

# **Systemic Coaching: An OD Strategy Applied to Mergers and Acquisitions**

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*The traditional concept of executive coaching is expanded to make the case for systemic coaching (SC)—organizationally focused coaching of key influential leaders throughout an organization. Executive coaching has been purported to provide organizational impact by accelerating the development of leaders. We suggest that coaching pivotal leaders throughout an organization can facilitate organizational development, specifically during times of change. We apply SC to the context of mergers and acquisitions (M&As) and discuss difficulties of M&As that can be addressed by systemic coaching.*

## **INTRODUCTION**

Leaders are facing increasing demands of a rapidly growing global economy that is both dynamic and expansive. One way organizations are addressing this concern is bringing in executive coaches to help leaders deal with the ambiguity created by the complexity of these ever changing business demands. Coaching leaders has become a means of evolving management as quickly as the business environment. Traditionally, the nature of coaching is an individually focused effort toward the development of the leader. In this paper, we argue that an organizationally focused coaching effort that equips key influential leaders throughout the organization with coaches, what we will term as systemic coaching (SC), can increase the impact of leaders as an organizational development tool during change initiatives.

Coaching has been purported to have a positive impact on organizational outcomes (Kampa-Kokesch & Anderson, 2001; Moen & Skaalvik, 2009). In this paper, we will highlight how SC can have a strong impact on the organization using the business context of a merger and acquisition (M&A). We begin by outlining the effectiveness of coaching leaders and the resulting organizational impact. Then we discuss areas of an M&A that are rich in developmental opportunities and challenges for leaders. We propose areas of executive coaching that can address these concerns and potentially provide resources for leaders to navigate through the transition of a M&A. Finally, we make the case that SC, as applied in this case to an M&A, can be an organizational development intervention.

## LITERATURE REVIEW

### Executive Coaching

One method available to executives and business leaders dealing with the need to develop on the job is to seek out or be assigned executive coaches (Kampa-Kokesch & Anderson, 2001). Kampa-Kokesch and Anderson (2001) provided one of the most succinct definitions of the executive coaches' role when working with senior leadership:

Executive coaching is a facilitative one-to-one, mutually designed relationship between a professional coach and a key contributor who has a powerful position in the organization. This relationship occurs in areas of business, government not-for-profit, and educational organizations where there are multiple stakeholders and organizational sponsorship for the coach or coaching group. The coaching is contracted for the benefit of a client who is accountable for highly complex decision with [a] wide scope of impact on the organization and industry as a whole. The focus of the coaching is usually focused on organizational performance or development, but may also have a personal component as well. The results produced from this relationship are observable and measureable. (International Coaching Federation Conference [ICF], 2000, p. 208)

As described by ICF, one of the key roles of executive coaches is to serve as an independent feedback sounding board (2000). In addition, coaches are able to provide insight into developmental tools and techniques that address the challenges the leaders face (Kampa-Kokesch & Anderson, 2001). Executive coaching can potentially have the greatest organizational impact when targeting decision makers with the greatest influence. Kombarakaran, Yang, Baker, and Fernandes (2008) suggested that coaching can result in five areas of executive change: (a) effective people management, (b) better relationships with managers, (c) improved goal-setting and prioritization, (d) increased engagement and productivity, and (e) more effective dialogue and communication. Given these potential outcomes, coaching can be leveraged as an organizationally focused intervention when targeting key individual leaders throughout the organization and aligning their coaching outcomes with an organizational initiative.

At the heart of the coaching experience is the alliance, or relationship, between the executive and the coach which is built on trust and mutual respect, and is an important factor in order for coaching to have a positive impact (Jones & Spooner, 2006). This alliance is based on a mutual understanding that the goals of coaching are in the best interest of both the leader and the organization. This understanding could be more easily established with an internal coach and issues of confidentiality and familiarity may persuade organizations to use internal coaches. However, the advantage of external coaches is their independence from the organization's political dynamics (Frisch, 2001). This debate will not be addressed in this article, but is a practical dilemma worth further discussion. Regardless of the coach's affiliation, the percentage of outcome variance accounted for by relationships comparable to those between a client and coach is 30% (McKenna & Davis, 2009). This suggests that regardless of the background between coaches and their clients, a strong alliance is crucial for coaches to challenge and support the leader's personal and career development by providing the five necessary conditions for development: insight, motivation, capabilities, real-world practice, and accountability (Peterson, 2002). Given the unique relationship formed by the alliance, coaches are in a position to address these five conditions to facilitate leader development.

While there is little empirical evidence directly linking executive coaching and organizational performance, there is considerable circumstantial evidence regarding the impact of executive coaching on managerial behaviors (Levenson, 2009; Peterson, 2009; Kombarakaran et al., 2008; Kampa-Kokesch & Anderson, 2001). Managers tend to show improvements in their leadership skills as identified using surveys, 360-degree reviews, interview data, and other organizational measures. These results are still extremely valuable, as some suggest that multi-rater feedback has higher criterion validity than self-report (Seifert, Yukl, & McDonald, 2003). In addition to reports from leaders who have received coaching,

coaches have also documented their positive impact on the organization (Levenson, 2009). A review of outcomes from executive coaching suggested that executive coaches influence the improvement of managerial skill and performance, as well as their retention over time (Peterson, 2002). Among others, these areas included positive changes in working relationships, efficient teamwork, organizational commitment, organizational outcomes and productivity (Kampa-Kokesch & Anderson, 2001; Peterson, 2002). These outcomes are beneficial not only to the individual being coached, but also to the organization that is attempting to retain or obtain key management, expertise, and human capital.

Despite the professed benefits of executive coaching, the actual impact on the organization depends on a variety of factors. These factors include how much the leader is dependent on others to accomplish their goals and responsibilities—the degree of interdependence of the leader’s role (Levenson, 2009), developmental readiness (Avolio & Hannah, 2009), and effective utilization of job appropriate skills and knowledge (Levenson, 2009). If task responsibilities are highly interdependent and the individual is a significant contributor, mistakes can result in significant roadblocks for the organization’s overall goals (Levenson, 2009). Providing coaching may help reduce the likelihood of mistakes and obstructions as leaders continue to develop.

A second factor impacting executive coaching is the level of developmental readiness of the leader, which refers to the ability and motivation of the individual to learn new information and apply new skills (Avolio & Hannah, 2009; Kampa-Kokesch & Anderson, 2001). The individual’s readiness for change can either impede or accelerate the collaborative process between coach and client, ultimately impacting the degree of value derived from coaching (Avolio & Hannah, 2009). These elements can be taken into consideration when deciding which leaders will impact the organization most strongly through coaching.

### **Who Receives Coaching?**

The application of executive coaching within an organization has traditionally focused solely on developing high level executives. Coaching has since expanded to include additional influential leaders, from managers through the top management team (Kampa-Kokesch & Anderson, 2001). These leaders of influence can be an incredible resource for implementing change given their earned credibility and respect within organizations. Influence can be described as the ability of leaders or individuals to elicit support and compliance from others (Yukl et al., 2008). Hogan, Curphy, and Hogan (1994) provided a view on leadership that entails influencing other people and setting aside individual concerns to pursue common goals that are important for the welfare of a group. This is a critical component of the concept of systemic coaching given its general applicability as a change management tool. Organizational changes and the method of execution are not always perceived to be in favor of the individual employee; therefore, the ability to see beyond personal outcomes to the needs of the organization and employees can help transcend the obstacles and carry out the new initiatives.

In addition to assessing task interdependence and developmental readiness, methods for identifying prominent individuals of influence (Yukl, Seifert, & Chavez, 2008; Peters, 2001) throughout the organization are vital to obtain the strongest impact from SC. While traditional coaching efforts are individual-focused, the organization’s business needs lie at the heart of SC due to the focus on multiple influential leaders across levels and departments of the organization who are provided with the benefits of coaching. Systemic coaching helps to mobilize leaders and their followers toward a consistent organizational goal by accelerating both leader and organizational development.

### **Why Organizational Change Initiatives?**

Situational factors where leadership development becomes even more crucial for organizations include highly stressful and novel circumstances. In fact, leaders themselves often identify key developmental events in their career as stressful, trial by fire, or virgin experiences (McCall, 1998; McCauley, Ruderman, Ohlott, & Morrow, 1994). Supporters of on-the-job development suggest that actively seeking stretch assignments are essential to advancing career development (McCall, 1998; Yost & Plunkett, 2009). These types of situations hold the potential for strong leadership development, as the leader is forced out of their comfort zone and required to grow and learn on the job in order to be

successful. These seminal points in leaders' careers are a great opportunity for coaching to have a significant impact on their development. Specifically, we suggest that the use of SC can capitalize on the developmental opportunities implicit in the challenges provided by an M&A.

## APPLICATION TO M&As

By focusing SC in critical areas that are naturally rich developmental opportunities, an organization can potentially optimize not only the development of great leaders, but also positively impact organizational development. M&As largely aim to increase economies of scale, which require the consolidation of resources as well as knowledge sharing (Hitt, Ireland, & Harrison, 2001). Despite the economical motives of M&As, the best way to “unlock the synergistic potential” is embedded in the integration/restructuring stage of an M&A (Barkema & Schijven, 2008, p.696). Given the myriad of additional complexities that leaders face as a result of organizational change, M&As offer a perfect case study for SC. These complexities include various aspects of change management such as: downsizing, acculturation, and re-organization, along with their combined impact on the survivors' ability to work productively (De Meuse, Marks, & Dai, 2011; Fugate, Kinicki, & Scheck, 2002; Hogg & Terry, 2000; Marks & Mirvis, 1992). Employee productivity concerns can also stem from the *social identity theory* of M&As which suggests that individuals tend to categorize themselves and others into in- and out-groups (Hogg & Terry, 2000). This can complicate the collaboration between individuals from different companies of origin, reduce the effectiveness and retention of leadership, and disrupt the structures of work groups (Hogg & Terry, 2000).

In addition to pre-existing assumptions, the most challenging situation presented by M&As is a high degree of ambiguity, which is experienced by everyone (Marks & Mirvis, 1992). This ambiguity can result in undesirable outcomes, such as rumors that instill panic and deviance (Schweiger & Denisi, 1991). More generally speaking, SC can be most useful as a change management tool to address the complications that arise as a result of ambiguity and cultural adjustments. Research has supported the implementation of transitional structures—tools that guide the change processes of M&As (DeMeuse et al., 2011; Marks & Mirvis, 2000). Systemic coaching, as a scaffold for leader development through a period of high ambiguity, can serve as a form of transitional structure for pivotal leaders. Leaders and leadership practices have been implicated as a critical component of attempts to provide direction, facilitate understanding of the process, and motivate performance during M&As (Schweiger & Denisi, 1991; DeMeuse et al., 2011). Leaders stationed along the sutures of the two organizations may be the most critical individuals of influence.

### Ambiguity

One of the hazards of M&As is uncertainty in terms of its success, acculturation, integration of key talent, layoffs, policy changes, and task reorganization (Seo & Hill, 2005). This uncertainty can result in undesirable outcomes such as negative emotions, decreased perception of control, decreased social support, and disruptive behaviors that impede productivity (Fugate et al., 2002). One way to address the above issues is to provide clear communication regarding merger related decisions and processes to all members of the organization through the key leaders. Clear and honest information that is timely, easily accessible, and accurate can provide a transitional structure that reduces negative side effects of M&As and helps to reestablish pre-merger productivity (Schweiger & Denisi, 1991). While transparency about these decisions may be difficult, research suggests that disclosure from the leadership team is ultimately more practical for all parties involved (Marks & Mirvis, 2000; Schweiger & Denisi, 1991).

In addition to the ambiguity inherent in a reorganizational attempt, *causal ambiguity*—lack of clarity between decisions and outcomes—can exacerbate the obstacles found while accomplishing M&A goals (King & Force, 2008). *Linkage ambiguity* describes an obscured understanding of how integration decisions affect organizational performance outcomes due to the amount of time that elapses before outcomes are clear (King & Force, 2008). This means that the actual impact of decisions is not clear, which can result in poor decisions, communications, and/or situations that negatively impact the

organizational outcomes. Coaches with experience in M&As and organizational change can help shed some light on potential hazards and decrease the level of ambiguity leaders are facing.

Another form of ambiguity stems from the merging of two cultures. Individual organizations tend to have their own unique cultural fingerprint. However, in M&As, merged functional teams can consist of survivors of both companies. These survivors tend to draw in-group/out-group lines determined by the company of origin. Research by Hogg & Terry (2007) suggests that some complications in merged teams are due to issues that stem from identification with the prior organization and its culture. Additional research implicates cultural differences as a potential source of friction when integrating teams and organizations (Nahavandi & Malekzadeh, 1988; Seo & Hill, 2005). Systemic coaching can prepare pivotal leaders for *cultural leadership*—the ability to reconcile cultural differences and establishing a new culture (Bligh, 2006). These efforts can facilitate the socio-cultural integration of employees, increase the realization of M&A potential, and potentially reduce the amount of employee casualties.

## COACHING THROUGH AMBIGUITY

This portion of the paper will suggest three areas where SC can help leadership throughout the organization deal with the ambiguity inherent in M&As. These consist of accountability, communication, and intergroup leadership. Firstly, coaching leaders in goal setting can help hold leaders accountable to their goals and positively impact the productivity of their unit (King & Force, 2008; Locke & Latham, 2002; Peterson, 2002). Secondly, the accuracy, accessibility, and timeliness of communication regarding the M&A process have been suggested components of a key transitional structure that can bring productivity back to pre-merger levels (Schweiger & Denisi, 1991). Coaches can encourage and support leaders through the disclosure of some difficult organizational decisions. Thirdly, ambiguity regarding organizational commitment and cultural identity can potentially be alleviated through strong intergroup leadership (Hogg & Terry, 2000; Pittinsky & Simon, 2007), a competency that leaders may not have previously developed. Coaches can be a resource for these individuals to develop these skills. Systemic coaching can help leaders throughout the organization manage through M&As by addressing these key issues.

### Accountability

Equipping critical leaders engaged in M&As with coaches can strengthen the links between departmental and organizational goals by holding leaders accountable for goals that are consistent with the broader business initiative. In an M&A, leaders tend to look for the most immediate solutions to problems (Barkema & Schijven, 2008). Because these “scans” for issues are relatively local, the needs of other departments and/or the organization are not accounted for. In contrast, having coaches strategically placed throughout the organization at key groups equips leaders with a resource that can constantly hold their decisions accountable to the organizational goals and needs of other departments. This can prevent leaders from ignoring their impact on the organizational system and guard against decisions that will have a negative impact during this critical time period.

Breaking down a complex goal into proximal, small wins, can facilitate goal achievement (Locke & Latham, 2002). We suggest that coach supervised proximal goals are potentially more effective due to increased opportunities to assess the alignment between leader, department, and organizational goals. Furthermore, coaches can help to ensure that these goals are not only aligned with the organization, but also effective. Key components of effective goals are specificity, measurability, and difficulty (Locke & Latham, 2002). Similarly, intermediate goals can reduce causal ambiguity to result in more efficient M&A performance (Cording, Christmann, & King, 2008). Research by King and Force (2008) found that intermediate goal achievement mediates the relationship between decisions and performance. Through the emphasis of clear goal setting, SC can influence organization wide development by holding key leaders and their goals accountable to the objectives of the M&A.

## **Communication**

Due to the difficulty of communicating business decision, which may or may not have a negative impact on employees, transparency is useful to avoid the ambiguity of employee reactions (Fugate et al., 2002). Coaches can offer support and advice about how to relay the most pertinent information in a timely manner without divulging proprietary information. Clear and accessible communication of critical information has been related to the reduction of disruptive employee behavior and the return of pre-merger productivity (Schweiger & Denisi, 1991). Because coaches are in a unique position to challenge and advise leaders, they can also screen what the leader wants to disclose and identify where communication may be unclear or have potentially more negative than positive effects. For example, leaders can practice the delivery of sensitive information through role-playing exercises with their coach. The coach's alliance with leaders can offer a sounding board regarding the clarity of communication as well as provide support when the leader needs to disclose unpleasant information.

## **Intergroup Leadership**

Traditionally, intergroup leadership focuses on the dynamics between two different teams (Pittinsky & Simon, 2007). A crucial role of SC is to help leaders redirect allegiances from their company of origin toward their functional role (job) in support of the organizational goals. While the key leaders may be effective at managing their traditional teams, they may not have experience melding two distinct social groups. Leaders may need guidance regarding tools to manage the dynamics of in-groups and out-groups within their own teams.

Systemic coaching can help leaders manage their own transition, and/or the transition of their team members from previously held social identities to their new organizational role. This transition is important as social identity, social categorization, and organizational culture boundaries can result in a sort of social segregation in M&A's (Hogg & Terry, 2007; Stahl & Voight, 2008). Effective intergroup leadership reduces ambiguity that stems from social identity and belonging by managing interdependencies (shared roles, goals, and rewards), promoting superordinate and dual identities, a positive intergroup attitude, and focusing on procedure (Day & Zaccaro, 2007; Marks, DeChurch, Mathieu, & Panzer, 2005; Kozlowski & Ilgen, 2006; Pittinsky & Simon, 2007). Systemic coaches can provide the framework through which leaders can develop skills in the areas we mention below.

Leaders are potent influences on the functionality of the team because they provide structure as well as foster relationships (Day & Zaccaro, 2007). Firstly, leaders are responsible for the organization of tasks and the motivation of team members. Arranging interdependent roles, setting goals, structuring feedback and rewards can all increase the effectiveness of one's team (Cohen & Bailey, 1997; Kozlowski & Ilgen, 2006; Pearsall, Christian, & Ellis, 2010). A second method for leaders to resolve intergroup hostility is the establishment of superordinate identities (Pittinsky, 2010; Pittinsky & Simon, 2007). These superordinate identities can be dual—for example professional and organizational—to avoid the turmoil that can result from being forced to abandon an identity during the M&A (Pittinsky & Simon, 2007). Additionally, those who identify with both a subgroup and a superordinate group tend to be less biased. Third, leaders can reduce in-group bias by exhibiting a positive intergroup attitude (Pittinsky & Simon, 2007) that can be contagious to team members (Cohen & Bailey, 1997). Leader behavior affects the unit's team climate and can inform members of norms and expectations (Kozlowski & Ilgen, 2006). Lastly, focusing on procedural fairness can trigger internal motivations to behave in the interest of the group (Pittinsky & Simon, 2007). Using SC to scaffold learning in these areas throughout the organization can not only reduce the ambiguity leaders face when confronted with intergroup conflict within their team, but also reduce the ambiguity team members cope with regarding their social identity. In the context of an M&A, coaches can provide insight, advice, and model aspects of what may be a new competency, intergroup leadership. Strong management of M&A survivors can increase productivity, motivation, and allegiance to the new organization.

## CONCLUSION

This theoretical paper re-conceptualized traditional individual focused executive coaching as SC, an organizationally focused change management tool. We hypothesized that identifying key influential leaders and equipping them with coaches can increase the organizational impact of coaching and facilitate the achievement of organizational goals through attending to the developmental needs of individual pivotal leaders. Specifically, in the context of an M&A, SC can function as a structural resource to reduce ambiguity and increase the productivity and efficiency of M&A efforts.

### Additional Considerations

This paper mostly focused on how coaching could affect the successful integration phase of an M&A. In addition to integration, M&A's have various stages with fluctuating employee coping behaviors that may have different emphases of concern for leadership (Fugate et al., 2002). Additionally, different types of teams—project versus management—(Cohen & Bailey, 1997) and their respective life cycle stages (Hackman & Wageman, 2005) may require different foci for coaching. The customizability of coaching to the individual as well as the organizational needs provides an additional strategic advantage for SC in the case of M&As—the ability to guide leaders through the various stages of an M&A. It would be advantageous for SC in M&As to identify these fluctuating needs and identify how to best address them through the different stages and types of an M&A.

The application of SC suggested in this paper could also be useful in corporate restructuring and corporate change initiatives. This paper grounded the concept of SC in the context of an M&A, limiting our ability to generalize these suggestions to other business cases. However, there may be other situations where SC can be a strong OD intervention. Another area that needs more research is how using internal, external, or some combination of coaches to meet the SC needs will impact the process. We encourage any additional research that can further our understanding of how SC can be used in various settings and applications to positively impact organizations.

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