

Implications and Consequences:

How can learning from use of a psychometric tool  
inform other HRD interventions?

THE UNIVERSITY OF HULL

Implications and Consequences:  
How can learning from the use of a  
psychometric tool inform other HRD interventions?

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## **Abstract**

This thesis presents findings on the implications and consequences of using a personality preference model as an organizational development tool. Whilst the research focuses on the proprietary model Insights Discovery®, the intention is not to validate or test the instrument or to see if it ‘works’ in a technical sense. Rather, the aim is to critically evaluate the ramifications of its use from an individual perspective. In doing so, the thesis explores the conflicting purposes and values associated with this psychometric tool and discovers how its use is rationalised, vindicated and proliferated by studying five case study organizations.

There appears to be an assumption that the Insights Discovery psychometric test is an innocuous tool which is fun and entertaining to use, producing mutual benefit to participants and the organization. This research challenges these assumptions and explores to what extent the promotional ‘hype’ is accurate.

Although the findings might be of particular interest to both those who instigate the use of Insights Discovery within organizations and practitioners who deliver it, the aim is that the conclusions will have a broader application. The focus is therefore on organizational development implications, considering if the learning from delivery of the Insights Discovery model can inform other HRD interventions.

The thesis emphasizes the complexities and potential contradictions and implications of utilising a psychometric tool in organizational learning and change initiatives. Indications suggest that psychometric profiling has the potential to be damaging to the individual and thereby, ultimately the organization. The thesis therefore sets out to establish if it is really possible that the potential ‘fallout’ of using such tools could ‘make or break’ a career?

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# **1. Introduction to the Thesis**

## **1.1 Introduction**

This chapter opens the thesis by offering justification and rationalization for the research. It examines the ways in which the thesis will contribute to wider theory and also offers an overview of the thesis structure. It goes on to provide a detailed narrative of each chapter, emphasizing links to the research aims and questions.

## **1.2 Rationale, research aims and research questions**

Personality tests are ubiquitous in the world and Insights Discovery is just one of approximately 2,500 personality questionnaires available on the market today. The predominant functionalist discourse surrounding Human Resource Management (HRM) and Human Resource Development (HRD) has resulted in the practice of psychometric testing becoming a taken for granted feature of organizational life (Turner, 1983).

Insights Discovery is an online personality profiling tool that uses a colour-coded system to assess an individual's personality preferences and place them on a colour wheel (see Appendix 2). It was founded by Andy Lothian and his father in 1988 and is now available in 30 languages, enjoying success in more than 40 countries worldwide, being used extensively by global companies such as Boeing, Microsoft, BP, Zerox, Merck and BT.

Grounded in the work of psychologist Carl Jung (1875-1961), it describes the personality in terms of both the dominant conscious energies and the opposing, less conscious energies. By answering a short questionnaire online - 25 questions - personality preferences are established and a detailed personal profile is electronically created which indicates colour energy preference (yellow, red, green or blue), key strengths, weaknesses, suggested areas for development and recommendations on how to improve performance (see Appendix 3).

Insights Discovery differentiates itself from other models as being “simple, practical and fun”, claiming immediate impact, simplicity, being easy to remember and implement, recognising everyone is unique and producing a personal profile. “It’s like holding up a mirror” (2012).

14 years ago I was a participant on an Insights Discovery workshop. A year later I became an Insights Discovery accredited practitioner. For the last nine years I have been employed by the University of Hull Business School and have used Insights Discovery both in my previous role as Management Consultant for the External Business Unit and in my current position as Lecturer in the Organizational Behaviour and HRM subject group. This has involved running Insights Discovery workshops for external clients (both as standalone events and as part of wider learning and development programmes) and University staff teams. I have used the tool on hundreds of individuals and therefore have a valuable wealth of experience and access to a large pool of potential research subjects.

Although this research focuses on the Insights Discovery model, the aim is not to validate or test the instrument or even to see if it ‘works’ in a technical sense. Rather, the aim is to carry out research from a social constructionist perspective, uncovering individual interpretations of the learning intervention, viewing them through a critical lens, within the boundaries of the conceptual framework. By exploring the interpretations and meanings attributed to the event by stakeholders, the research aims to understand the implications and consequences for individuals participating in the Insights Discovery model. It is considered inevitable that where individual consequences occur, organizational consequences will ensue, and therefore the intentions and expectations of those using Insights Discovery will be made visible, and any tensions between employees and employers exposed.

Whilst the conclusions might be of particular interest to both those who instigate the use of Insights Discovery within organizations and practitioners who deliver it, it is expected that the outcomes will have a broader application, contributing to literature

and knowledge by considering the wider implications for HRD practice and opportunities for further research. The focus is therefore on organizational development implications, considering if the learning from delivery of this model can inform other HRD interventions.

Reports are in existence regarding the validity and reliability of the Insights Discovery tool (Benton et al., 2008), as are papers on its application to sports teams (Beauchamp et al., 2005) and project management (Mullaly and Thomas, 2007). Literature on this subject is sparse however, in marked contrast to other models, such as MBTI, which are more widely and critically debated. Predominantly, writing around the model is of a promotional nature and there is insufficient empirical research on the consequences and implications of its use. These important issues are not fully understood and we do not adequately know how to deal with what follows use of this psychometric tool.

Turnbull and Elliott highlight that “little thought has been given to the short- and long-term effects of training and development on the identities, emotions and well-being of those who participate in training programmes with powerful identity messages”(2004:191). Others caution against over reliance on another psychometric tool – the Myers Briggs Type Indicator (MBTI) - and asks those planning to use the test to “take a long look at the value of using personality type labels in their work”(Pittenger, 1993: 6). Some argue that personality tests may be simply substitutes for observation and good management (Hayakawa, 1950, Melamed and Jackson, 1995, Lewis, 1999) and brand them as “nothing more than an alluring fantasy or perhaps wilful deception” (Paul, 2004:221). Training is too susceptible to flavour of the month (Mumford, 1997), and HRD practitioners are advised to ask themselves why the method used is more appropriate than any other method for a particular need and will the outcomes to be gained be worth the cost involved.

Melamed states that “a good psychometric test must be fit for purpose and the results only interpreted for what it was intended....we need to guard against the untrained and ‘incompetent’ manager using the information in isolation to make judgemental decisions” (1995:12). McGregor recognises that personality tests and a manager’s

knowledge of an employee yield at best an imperfect picture, stating that psychometric tests “have genuine value in competent hands” (1972:517).

Despite these warnings however, personality tests are generally seen as a functional, innocuous tools and HRM/HRD adopt a normative, and often, prescriptive approach as to their desirability and mutually beneficial outcomes. This is an assumption that the thesis seeks to question. In addition, psychometric tests are frequently delivered by minimally trained personnel and untrained managers are free to interpret the results with unknown impact.

It is therefore pertinent and timely to question to what extent is there parity between the aims and benefits sought by management who instigate use of the model and those realised by participants. It is also relevant to consider the consequences for those who take part in Insights Discovery workshops. In addition, as the concerns and interests of senior management and participants become entwined, it is also important to consider the implications for HRD professionals.

These enquiries are frequently posed by critical HRD scholars in the context of learning and development interventions. O’Donnell et al seek to surface “the implicit, often unspoken agendas of power, exploitation and control that often lay beneath the cosy, overly humanist and unitarist surface exterior of much HRD discourse and practice”(2006:4). Some refer to the massive gulf between the humanistic ‘mutual gains enterprise’ (Kochan and Osterman, 1994, McGuire et al., 2005) and the mercenary ‘individualised corporation’ (Ghoshal and Bartlett, 1998). Alvesson and Willmott brand humanistic HRD as “a fatally crippled, ideologically polluted version of ‘emancipation’ that merits harsh critique” (1996:229). Other scholars, such as McLagan (1989), also support the view that the organization is the main beneficiary of HRD activities. It is argued that humanistic approaches continue to be too uncritically taken for granted by far too many theorists and practitioners (McGuire et al., 2005).

As an HRD practitioner, I support wholeheartedly the humanistic perspective of HRD (Swanson and Holton, 2001, Rogers, 1969)) and I believe unreservedly that those who enter the profession do so predominantly to focus on the individual, to encourage self-

actualisation and motivate employees to self-develop. They believe in the possibility of a win situation, building engagement and loyalty at the same time as strengthening relationships between the individual and organization (Swanson and Holton, 2001, Aktouf, 1992). Years of working with HRD professionals has convinced me that they have the upmost respect for the employees they work with, they value individual dignity and aim to develop the whole person though experiential and participative methods. That said however, exposure to the critical HRD scholars has alerted me to the possibility that good intentions may cover a multitude of sins. The purpose of my research therefore is to challenge the 'taken for granted' assumptions made inside organizations and uncover some of the issues and equalities that long ceased to be visible or questioned. The narrative may, at times, appear skewed in favour of the critical voice, and to downplay the positive role of HRD in organizations, however, this has been a conscious decision, made to in part to counter my previous humanistic/functionalist view of HRD and most importantly to contest the predominantly held opinion that any learning and development activity is good.

Despite the extensive deliberation of critical scholars, the issues of power, control and exploitation have not been specifically explored with regard to the use of psychometric tests as organizational development tools. This thesis attempts to address this omission by developing a pluralistic and critical understanding of the use of the Insights Discovery psychometric tool in learning and development arenas. It will do this through an exploration of interpretations and experiences of stakeholders involved in the use of the Insights Discovery model in five case study organizations.

Foucault states that the construction of knowledge in HRM and HRD calls for "effective instruments for the formation and accumulation of knowledge-methods of observation, techniques of registration, procedures for investigation and research, apparatuses of control" (1980b:102). As an HRD tool, Insights Discovery seeks to shape employees and remould individuals to act in certain ways, bonding them to what are considered to be "appropriate" identities (Townley, 1989). "Essentially, these tests function as a means of measuring and evaluating individuals, rendering them calculable and manageable" (Rose, 1988:195). The status of the individual and their right to be 'individual' and 'be who they really are', often gets lost in the process (Townley, 1989). Willmott's reports

on corporate cultures that “secure control by managing the impression of respecting the distinctiveness and individuality of each employee” (1993:526).

Hollway discusses attempts to harness the employees ‘soul’ for productive ends and Barratt considers that practices such as self-development, competencies, involvement and empowerment are all designed explicitly to engage the “psyche of the employee” (2003:1073). Foucault (1977) highlights the real danger as being not necessarily that individuals are repressed by the social order but that they are "carefully fabricated in it" as power penetrates into their behaviour. He recognizes that, in order to acquire productive workers "power had to be able to gain access to the bodies of individuals, to their acts, attitudes and modes of every day behaviour" (1980b:125). Ackers and Preston (1997) assert that if we respect people and their rights, there is something unethical about shaping the personality of an individual to suit the organization and expecting that organization to dominate their lives. Insights Discovery is essentially a tool that allows easy access to the bodies and minds of willing participants and therefore ethical issues will be an important consideration in my research.

This thesis will challenge the commonly held view of HRD as an ethically positive practice and in particular the ethicality of personality shaping. It will do this by exploring the views of those who contest the idea that learning is an “intrinsically good or virtuous activity... and ...that organizations that provide the means for training and development are acting virtuously” (Woodall and Douglas, 1999:249). By adopting a critical management perspective (Alvesson and Willmott, 1996, Mabey and Finch-Lees, 2008) it will challenge assumptions and taken for granted ‘truths’ questioning the ethics and morality of HRD practices.

Turnbull and Elliott state that HRD professionals may well find uncomfortable the accusation that they are “tacitly supporting hidden and unacknowledged agendas of organizational control” (2004:191). It is clear from the outset that this research will fundamentally challenge my own personal beliefs and assumptions, as well as testing my views of HRD as an ethical profession. Woodall and Douglas warn that the “tradition of ethical humanism present in earlier work on adult learning and organizational development can be undermined by developmental interventions designed to change

culture and personal values” (1999:249). They question the ethics of exposing personal identities and then seeking to change them – challenging the right of the facilitator to subject individuals to transformational learning.

For precisely this reason, “the implications of the identity shaping role of HRD and the moral as well as social repercussions” warrant further investigation (Elliott and Turnbull, 2004:191). Elliott and Turnbull question whether HRD should be involving itself with identity shaping and ask if HRD professionals are prepared to take responsibility for employees making life-changing decisions to change their career, their attitudes and their beliefs. The fact that HRD is involving itself in this field of personal change places “a heavy burden of responsibility and care on HRD practitioners designing such programmes”(2004:199). Alvesson (1996) states that consideration of the impact of the intervention on participants is crucial both ethically and professionally. This thesis explores the possible implications of one such learning intervention and seeks to examine the repercussions and consequences from a critical perspective.

### **1.3 Contribution to knowledge**

This thesis seeks therefore to make an original contribution to knowledge in this area through the exploration of the implications and consequences of using the Insights Discovery psychometric tool.

Firstly, it contributes to the field of critical HRD studies by means of empirical data and analysis - analysing and theorising on the impact on “identities, emotions and well-being”(Elliott and Turnbull, 2004:191) of those who participate in identity changing learning interventions such as Insight Discovery.

Secondly, it brings together various fields of existing knowledge to attempt to explain the power and influence of the Insights Discovery tool and the reasons behind its ardent following.

Thirdly, the research discusses the consequences of using the Insights Discovery model and explores any resulting tensions and anxieties that emerge. The exploration of the use of Insights Discovery in five case study organizations enables a thorough examination of the empirical data from the perspectives of three stakeholder groups; programme sponsors, participants and non-participants.

Lastly, the thesis contributes to practice by challenging the way HRD uses transformational learning tools such as Insights Discovery within organizations. It cautions HRD practitioners to be aware of the potential dangers and ethical issues involved and reiterates the critical role played by HRD professionals.

In these ways the thesis seeks to make a strong contribution to theory by offering a rigorous, analytical account of an area that appears to have been previously under researched. Existing research in the field of psychometric testing in HRM/HRD areas is predominantly descriptive and normative, eulogizing the common-sense, taken-for granted, mutual benefits of such interventions. This analysis of a psychometric profiling tool carried out in an organizational context, is conducted from a critical perspective and seeks to disrupt 'normalised' understanding and assumptions to reveal hidden meanings and critical insight.

Thus it is anticipated that the lessons learned will be transferable to other HRD interventions and will inform future practice. Exploration and comparison of stakeholders' perspectives, experiences and interpretations will reveal a complex, and power infused picture which will lead to unanticipated thoughts and realisations. This thesis seeks to unpick existing claims by giving a voice to participants, thereby uncovering experiences that lay concealed behind the tool's promotional facade.

To this end the research questions are formulated as:-

- What are the implications and consequences of using the Insights Discovery tool?
- How can the distinctive power and influence of Insights Discovery be explained?
- How can learning from the delivery of the Insights Discovery tool inform other HRD interventions?

I will now clarify the reasoning and logic behind the thesis by providing a narrative guide to the structure and content, showing how each chapter specifically relates to the research aims and questions.

## **1.4 Chapter guide**

**Chapter 2:** explores literature pertinent to the key elements of the research. It provides a contextual backdrop to the thesis by examining literature under the headings of HRD, transformational learning and ethics, organizational learning and psychometric tests. Examination of the prevailing discourses will enable an understanding of how learning and development interventions have become viewed as universally beneficial regardless of their format and intended outcomes.

**Chapter 3:** explains the construction of my conceptual framework. This is structured from concepts, assumptions, expectations, beliefs and theories and will act as a map to my research journey. The chapter explores and explains the underpinning commitments to my ontological and epistemological approach and demonstrates my own position on the philosophical issues that have shaped my research.

**Chapter 4:** discusses the research design and offers an explanation for the process undertaken and the rationale behind it. It explains how my philosophical stance has influenced and informed the methodological approach, before going on to explore the techniques used to collect and analyse data in order to provide evidence for the posited knowledge that the research constructs.

**Chapter 5:** presents the five case study organizations and offers an overview of each by considering the following relevant aspects; The Organization, Delivery, Senior and Line Management Commitment, Relationship and Relevance to Business Objectives. A summary table is then provided for each organization, allowing key facts to be

assimilated so that similarities and differences can be highlighted and comparisons made.

**Chapter 6:** is the first of three chapters which uses a key theme, identified from the empirical material, to explore the data. This chapter surfaces the issues of gender stereotyping and discrimination, challenging the Insights Discovery claim that “there is no opportunity for bias or boxing in the Insight system” (Insights®, 2012). Viewed through a critical lens, it discusses the effects of personality profiling on participants, guiding the reader from findings to theories, showing the path taken to arrive at these interpretations. Chapter 6 therefore specifically addresses the research question;

- What are the implications and consequences of using the Insights Discovery tool?

**Chapter 7:** is the second chapter to analyse the empirical material in relation to a key theme; power. This chapter addresses the issue of power and the Insights Discovery model, thereby specifically addressing the research question;

- How can the distinctive power and influence of Insights Discovery be explained?

Again viewed through a critical lens, it discusses the effects of public exposure and scrutiny on participants, guiding the reader from findings to theories, showing the path taken to arrive at these interpretations.

**Chapter 8:** is the third and final chapter which uses a key theme to analyse the data. This chapter addresses the influence and role of colour in the Insights Discovery model. Driven by the empirical data, it deliberately and intentionally focuses on the colour red and challenges the putative innocuous use of primary colours. It explores the connection between colour and meaning, and the extent to which these draw on assumptions and beliefs that remain outside our consciousness.

This chapter therefore addresses and specifically contributes to the research questions;

- What are the implications and consequences of using the Insights Discovery tool?
- How can the distinctive power and influence of Insights Discovery be explained?

**Chapter 9:** presents a summary of the findings under the three themes. It provides an opportunity to make interpretations and linkages, and to draw out and describe key issues being discussed by participants within the empirical data.

The three themes are;

- Stereotyping, gender and the Insights Discovery model
- Power and the Insights Discovery model
- The importance of colour

**Chapter 10:** brings the thesis to a close by discussing the issues and implications of using the Insights Discovery model.

It confirms how analysis of the empirical data specifically addresses each of the research questions. Each research question is considered consecutively in order to substantiate unequivocally that the aims of the thesis have been achieved and the research questions answered.

In particular, this chapter serves to answer the research question ‘How can learning from the delivery of the Insights Discovery tool inform other HRD interventions?’ It finally concludes with an explanation of how the thesis has made a contribution to knowledge and discusses opportunities for further research.

## **1.5 Concluding remarks**

This chapter has provided a rationale for the research and has demonstrated how the thesis will contribute to theory by providing a rigorous, analytical account of an area that has apparently been previously under researched. The analysis of a psychometric profiling tool carried out in an organizational context, is conducted from a critical

perspective and seeks to disrupt 'normalised' understanding and assumptions to reveal hidden meanings and critical insight.

The thesis argues that existing research in the field of psychometric testing in HRM/HRD areas is predominantly descriptive and normative, eulogizing the common-sense, taken for granted, mutual benefits of such interventions. Chapter 2 therefore seeks to explore literature pertinent to the key elements of the research and situates the thesis in the context of discourses around learning and psychometric tools.

## **2. Exploration of the Literature and Discourse**

### **2.1 Introduction**

The purpose of this chapter is to review literature pertinent to the key elements of the research and situate the thesis in the context of discourses surrounding learning and psychometric tools.

The goal of this discussion is to explore the prevailing discourses and understand how they combine to present learning and development interventions as unchallengeable, common-sense ways for individuals to improve themselves and organizational performance. It will put forward an argument that the predominant functionalist approach to HRD should be challenged and that learning interventions – using psychometric tools or otherwise – may not necessarily lead to learning for individuals or the organization.

Exploration of the current literature is an important and expected part of my research journey; however, there are pitfalls to be aware of. Maxwell refers to Becker's (2007) warning that existing literature, and the assumptions embedded in it, can deform the way research is framed, resulting in potentially overlooking important ways of conceptualizing the study or key implications of the results. The literature has the advantage of what he calls "ideological hegemony" so that it is difficult to see any phenomenon in ways that are different from those that are prevalent in the literature (2013:51).

In an attempt to heed this warning, I have read diversely, focusing not only on studies and theories specifically relevant to the HRD arena, but also considering discourses from other disciplines. Maxwell (2013) advises researchers to bring in ideas from outside the traditionally defined field of study, integrating different approaches, lines of investigation or theories that may not have been previously connected .

My goal throughout has been not only to describe the literature but to look for alternative ways of framing the issue. I have therefore approached previous research

and theory “not as an authority to be deferred to, but as a useful but fallible source of ideas about what is going on” (Maxwell, 2013:31). This experience has informed my research regarding existing theory, highlighted gaps in current research, helped create an argument as to why the research is needed, as well as solidifying the research questions.

It is a given that this literature review is of my own personal construct and reading around HRD, Learning and Development interventions and the tools used, brought certain themes to the fore whilst others were ignored. Cunliffe (2003) confirms that inevitably as we put the spotlight on certain theories and ideas, others fall into the shadows. The literature review presented, is therefore just one of many forms it could have taken.

The academic areas chosen to focus on and develop links between were:-

- HRD: humanism or exploitation? - There was a need to understand the differing perceptions of HRD and consider alternatives to the predominant ‘win win’ discourse associated with learning and development.
- Transformational learning and ethics – This theme was chosen in order to explore the effects on participants of using transformational learning techniques (such as Insights Discovery) and to importantly consider the ethical implications of putting individuals through a potentially traumatic learning experience.
- Learning and organizations – Learning is predominantly seen as a good thing to do and most organizations adopt the view that ‘any training and development is better than none’. By exploring this area of the literature, the review sought to question this assertion and reveal whether learning and development initiatives are a worthwhile investment.
- Perspectives on psychometric tests – Insights Discovery is a psychometric test, and as such, it was necessary to explore the historical background of these tools and the views of academics who are expert in this field.

Deliberation on previous work, studies and questions asked by other academics around all these themes, led to the development of the research questions.

## 2.2 HRD: humanism or exploitation?

In recent years the humanistic approach to HRD has gathered momentum and employee centred practice is seen as the vehicle to move individuals from 'job compliance to job commitment' (McGuire et al., 2005). Swanson and Holton (2001) argue that humanism is absolutely central to the HRD field with its core emphasis on the inner motivation of employees to develop themselves.

The link between recognition and value, commitment, job performance and economic success is supported by empirical studies (Schuster, 1998, Aktouf, 1992). Humanistic approaches to HRD hail from the work of Rogers (1969) who emphasises the importance of self-esteem and self-development to employee work place performance (Knowles, 1998, Adesso, 1996). Employees are seen as adding value and McGuire asserts the existence of "an implicit reciprocation of values on behalf of employees and the organization – namely that employees agree to invest their time and effort to further organizational goals and in exchange that the organization commits to treat them equitably and with respect" (McGuire et al., 2005:3).

Assumptions made from a functionalist, unitary view assumes that HRD will unquestionably benefit both the employee and the organization. Learning is seen as "intrinsically good" (Woodall and Douglas, 2000:116) and organizations that offer training and development bathe in this optimistic glow. Trainers and facilitators of learning and development initiatives are, by their association with learning, considered to be of similar virtue. Elliott and Turnbull point out, that despite this widely held assumption, the "social and ethical roles played by HRD in influencing workforce behaviour, or the role of HRD as a moral conscience of the organization" is rarely acknowledged (2004:189).

From a humanistic perspective, HRD is seen to be focused on the individual, emphasising self-actualisation, motivating employees to self-develop. This notion flourishes in an environment where "employment relations in organizations is deemed to have become

more informal, apparently consensual and loosely democratic” (O'Donnell et al., 2006:1). The discourse of mutual gain of both the organization and the individual appealingly offers a win: win situation, building engagement and loyalty as well as strengthening relationships between the individual and organization (Swanson and Holton, 2001, Aktouf, 1992). The humanistic literature sees the employees as stakeholders who can benefit from HRD and its mutual gains agenda. This view has been long accepted without question by organizations, managers and employees who see HRD as supporting and delivering the development of employees and their organizations (McGoldrick et al., 2002, Darmon et al., 1999). Perhaps this explains why HRD has felt little pressure to examine in any detail the ethics of its policies and practices. Becker (1975) observes the difficulties of examining the morals of an agent (such as an HRD professional), compared to a situation. It is therefore possible for a 'virtuous' label to be self-awarded and exist uncontested.

The functionalist view that HRD is concerned with maximising resources is widely practiced (Armstrong, 1999). HRD is increasingly recognised as a complex, heterogeneous discipline serving many stakeholders with diverse purposes, incorporating “the multiple threads of organizational existence most quintessentially” (Mabey, 2003:430). The focus on increased performance and enhanced shareholder value inevitably links to the exploitation and abuse of employees. It is argued that the term 'human resources' is in itself derogatory, regarding people as having similar value to materials such as money, buildings or technology. Oxtoby and Coster (1992) state that resources are classed as important only for their ability to be exploited in order to add value.

O'Donnell et al go further, seeking to upturn the “hegemonic agenda” of the humanistic view, surfacing “the implicit, often unspoken agendas of power, exploitation and control that often lay beneath the cosy, overly humanist and unitarist surface exterior of much HRD discourse and practice”(2006:4). They label the humanistic vision as one-sided, politically naive, poorly informed, with employees expected to conform and support the current HRD agenda. They argue that performance is and will be the dominant driver and even in unionized organizations, the work force is forced into the role of 'silent follower'. HRD is therefore said to involve “the instrumental exploitation of employees

to drive organizational performance and enhance shareholder value” (2006:1). Other authors refer to the gulf between the potential of the humanistic ‘mutual gains enterprise’ (Kochan and Osterman, 1994, McGuire et al., 2005) and the mercenary ‘individualised corporation’ (Ghoshal and Bartlett, 1998). Alvesson and Willmott are similarly perturbed by the humanistic HRD discourse, branding it as “a fatally crippled, ideologically polluted version of ‘emancipation’ that merits harsh critique” (1996:229). McGuire asserts that “Humanistic approaches mislead employees and perhaps HRD professionals by fostering the illusion that the needs of employees and organizations are mutually inclusive.... they present to employees the ethos and ideals of a not-for-profit organization where individuals work together for the unitarist good of all” (McGuire et al., 2005:4).

Other scholars support the view that the organizations benefit more from HRD activities than do any other stakeholder groups. The movement from job for life to ‘employability’, places the heavy responsibility of career development squarely onto employees, who have to rely on self-motivation to develop themselves, frequently in their own time and with their own money (McLagan, 1989). Beck argues that the labour market has now become the driving force behind the individualisation of people’s lives. “employees are actually forced to look to themselves in protecting their market position”(1994:348).

O’Donnell concludes however that the labour force is generally content with the status quo and the relationship between themselves and HRD is acceptable and working. “In the intangibles and knowledge economy, human capital has some voice in its relations with capital—and the capability of ‘exit’ to experience other better paid, more interesting or challenging variations of capital” (2006:11).

Perhaps then if employees are empowered to leave an employer as and when they see fit, HRD has less influence on career planning and individual development than we assume. Recent research suggests career paths are in fact more a result of accidental opportunity than deliberate action (Watson and Harris, 1999, Lord, 2003). Du Gay (2000) attempts to explain this view by stating that employees are intrinsically driven to

search for meaning and fulfilment, taking responsibility for their own development but relying on the support of the organization to provide appropriate opportunities to make it happen . Indeed, many employees strategically use HRD initiatives to their own advantage, to meet their own career and personal development goals. Garavan et al (2004) refer to the increasing focus on the individual and the acceptance that self-enhancement may be as worthy a reason for seeking out development as to enhance job related competency. Employee goals may be career advancement, increased remuneration, the desire to learn something or simply to 'go with the flow' in their organization. It is noteworthy that in most organizations, opposition or refusal to take part in an HRD intervention is rarely considered a viable option.

HRD practitioners will undeniably have their own view of HRD and the ethical implications of a humanistic or functionalist approach. However the necessity to defend the existence of HRD in monetary terms is clear to all. HRD professionals recognise it is in their own interest to contribute to the survival of the organization. Harrison and Kessels (2004) describe the community of an organization as having a shared and vested interest in achieving its goals and objectives via the sharing of knowledge and learning.

The link between corporate goals and HRD is exposed by the definition of Strategic HRD as a function designed to construct a learning culture which responds to and simultaneously shapes the organizational strategy. This explanation clearly highlights the priority of the organization and at the same time devalues the humanistic HRD approach which respects individuals and encourages personal development and self-actualization (McCracken and Wallace, 2000). Acknowledgment that HRD is "serving multiple masters" has questioned who HRD is developing employees for. Is it for benefit of the individual, for the benefit of the organization or for the benefit of both? (O'Donnell et al., 2006). A commonly held view in the HRD community is that learning and development is not about teaching but about providing opportunities for employees to learn (Gintzberg and Reilley, 1964, Kolb, 2015, Revans, 1982, Lloyd, 1990).

Critical HRD – the fusion of HRD and critical management studies – is dominated by power, politics and a move towards the emancipation of employees (Stewart et al., 2007). Arguments over who benefit from HRD implicitly assume it will benefit the

employer and/or the employee – it is simply the distribution of benefit that is challenged. Mabey (2003) criticises those who view HRD from a single perspective – focussing on performance measures, or exclusively on individual development - and proposes that we need “an interplay of multiple lenses” so we can confront the tensions and contradictions that appear in HRD literature (2003:431). This research therefore focuses on taking a critical perspective of HRD.

The “multiplicity of purpose” means that HRD exists in a continuous state of “dialectical tension” between the imperatives of the organization and the labour force (O'Donnell et al., 2006:2). O'Donnell et al state that; “discussions on tension within the capital-labour relation are healthy, but ultimately, where does the real power reside? Much here is beyond the influence, let alone control, of any HRD practitioner” (2006:6). The humanistic view of a caring, considerate organization, amenable to the needs of its employees remains an aspirational goal. In many organizations “the capital-labour relation remains much closer to a dictatorship... There are fine organizations to work for; and there is rampant exploitation in others—wherein the roles adopted and the psychological and political tensions that HRD practitioners must cope with are decidedly different” (2006:11). Vince concurs with this view, urging us to ask “what function does HRD have within the political systems of organizing, how and why HRD provides mechanism for the control and manipulation of organizational members and what role fear (or other such powerful emotion) plays in defining how HRD is and is not done” (2005:27).

The struggle between reconciling the needs of individuals and the needs of the organization are widely recognised, and the role of HRD frequently questioned. Should HRD be an emancipator of the people, freeing them from the shackles of capitalist exploitation and employment degradation? (O'Donnell et al., 2006). Perhaps as HRD professionals we need to take an honest look at our motives, methods and interventions and uncover the real winners and losers. HRD practitioners are generally branded as well-meaning and moral, but as the proverb says, the road to hell is paved with good intentions. Good intentions alone are not a guarantee of virtue or ethical behaviour. Perriton warns HRD practitioners that “ we too rarely stop to ask if our actions and

interventions are virtuous or whether what we hold to be virtues are always viewed as such by those who are placed in our professional care” (2004:186).

Landy and Trumbo (1976) refer to King (1969) who reminds us of the significance of the old French word ‘trainer’ , meaning ‘to drag’. They argue that the role of HRD is to provide interventions which are intended to ‘drag’ employees in a certain direction in order to ensure they fit with the prescribed values and attitudes of the organization . HRD professionals may well therefore find themselves as an unknowing participant in these unspoken agendas, thereby placed in an untenable position (Turnbull and Elliott, 2004). Turnbull and Elliott go on to ask “whether HRD should be in the identity shaping business to the extent that it takes responsibility for an employee making a life-changing decision to change her/his career trajectory, or should it avoid such engagement?” They go on to assert that as soon as we start to “engage with a person’s work identity in any form, it is inevitable that this will have effects on their home and social identities that we neither see nor understand” (2004:199).

Alvesson and Deetz argue that “objects of management control are decreasingly labor power and behaviour and increasingly the mind power and subjectivities of employees” – intellectual capital (1996:192). The fact that HRD is involving itself in this field of personal change “places a heavy burden of responsibility and care on HRD practitioners designing such programmes” (Turnbull and Elliott, 2004:199). Considering the impact of the intervention on participants is crucial both professionally and ethically.

O’Donnell et al state however that “HRD scholars have yet to adequately inform practitioners about how critical discourse is relevant, and more importantly, how practitioners might cope with such tensions and draw critical insights in informing their everyday HRD practices” (2006:2). Humanistic approaches continue to be uncritically taken for granted by far too many theorists and practitioners (McGuire et al., 2005). It is therefore the purpose of my research to challenge the ‘taken for granted’ assumptions made inside organizations and uncover some of the issues that long ceased to be visible or questioned.

## 2.3 Transformational learning and ethics

HRD interventions are seen, from a functionalist perspective, as playing a central role in creating and changing organizational culture. Mabey and Salaman (1995) criticize this overly simplistic discourse because it ignores the pluralistic nature of organizations in assuming there is one culture in existence that can easily be changed. O'Donnell et al (2006) state that the idea of a unified organizational culture often goes unchallenged and that in practice, employees quickly see unashamedly strategic HRD practices for what they are and choose to defy or disregard them completely.

Changes in labour have seen a shift from manual to knowledge workers and as a result, the “objects of management control are decreasingly labour power and behaviour and increasingly the mind power and subjectivities of employees” (Alvesson and Deetz, 1996:192). The shifts in power may be so deep rooted in organizational norms and taken for granted assumptions that employees become socialized into complying with guidance in how to think and behave (Rusaw, 2000). This has led to an HRD agenda that emphasises knowledge management and organizational learning, as well as organizational culture and values. The result of which is that “the priorities and purposes of HRD frequently become blurred and the outcomes difficult to assess” (Mabey, 2003:430). The focus has been on designing and delivering learning interventions that can shape and change the cultures and values of the organization and its employees. Turnbull and Elliott consider that the “vogue for cultural management” (2004:190) is waning, replaced by programmes aiming to imprint employees with the values of the organization.

HRD is increasingly concerned with identity shaping – transformation and change. Organizations want employees to be transformed into people who represent their core competences, values and beliefs. “HRD practitioners have often found themselves at the helm of such initiatives, but frequently with little understanding of the impact they have on those who are targeted by them” (Turnbull and Elliott, 2004:191).

The short and long term impact of change interventions on participants is identified by Turnbull and Elliott as being under researched. “Much of HRD is concerned with identity

shaping” (2004:191) and they ask “those involved in the design and delivery of HRD programmes to consider the immediate and longer term political impact of such programmes on other facets of their lives” (199). For these reasons, the “implications of the identity-shaping role of HRD and the moral as well as social repercussions” warrant further investigation (191). This research is therefore relevant and timely.

The desire of organizations to influence and change the thinking and attitudes of employees, has led to the development of many sophisticated learning theories. Mezirow (1978) developed the concept of transformational learning which is defined as learning that induces greater, further reaching change in the learner than other forms of learning. It particularly refers to learning experiences that shape the learner and produce a significant impact – a paradigm shift - which affects the learner’s subsequent experiences (Clark, 1993). Transformational learning is seen as a focus of research in the area of adult education (Taylor, 1998, Boyd and Myers, 1988) and has developed “into a comprehensive and complex description of how learners construe, validate, and reformulate the meaning of their experience” (Cranton, 1994:22).

Mezirow (1978) developed the idea that individuals have a unique view of the world. He termed the phrases ‘meaning perspectives’ and ‘meaning schemes’, which are constructed from specific knowledge, values, and beliefs about an individual’s own experiences. Meaning schemes combine together to form a meaning perspective, and this provides a frame of reference which influences not only the individual’s behaviour but also their interpretation of events (Taylor, 1998). He states that meaning perspectives were created during childhood, influenced by events, culture and context, acting as perceptual filters that determine how an individual will assign meaning to their life experiences. Mezirow advises that meaning perspectives change naturally, evolving over time in response to life experiences, especially those prompting strong emotional responses, a “disorienting dilemma”. These may include personal crises, disaster or accident (1995:50). Transformational learning also has a confessional element, “The learner is encouraged to go in search of his or her false assumptions, and then go through the cathartic experience of owning up to them” (Newman, 2014:348). This is particularly pertinent to my research, as the Insights Discovery model potentially

provides the unexpected, powerful experience that changes the way people see themselves and their world.

Mezirow (1997) writes that changing meaning perspectives is a fundamental part of transformational learning, and through a combination of reflection and discussion, individuals are capable of shifting their world view. He asserts however that transformational change will only happen when new experiences do not fit within our current frame of reference . This concurs with Lewin (1939) whose seminal works on change management have had a major influence on the way we think about learning. He states the key to resolving social conflict is to facilitate learning and so enable individuals to understand and reorganize their perceptions of the world.

Lewin's 3-Step model states that any successful change project, either for an individual or an organization, involves three steps:

- Step 1: Unfreezing. The equilibrium or status quo needs to be destabilized (unfrozen) before old behaviour can be discarded (unlearned) and new behaviour successfully adopted (Lewin, 1947). Allport (1948) describes the 'catharsis' which seems necessary before prejudice can be removed. Lewin (1951) quoted in Marshak (1993) states that "to break open the shell of complacency and self-righteousness it is sometimes necessary to bring about an emotional stir up" (1993:400). Schein comments that "the key to unfreezing . . . was to recognise that change, whether at the individual or group level" and describes it as "a profound psychological dynamic process" (1996:27).

The term 'comfort zone' has become widely used and is defined as "...a behavioural state within which a person operates in an anxiety-neutral condition, using a limited set of behaviours to deliver a steady pattern of performance, usually without a sense of risk" (White, 2009:3). Having established a comfort zone in a particular area of life, the subject will become lethargic and inert, tending to stay within that zone and not step outside of it. To step outside their comfort zone, they must experiment with new and different behaviours, and then experience the new and different responses that occur within their environment.

A comfort zone may result when the mental concept that a person has about something and the apparent reality of it are not congruent with one another. Comfort zones can be the greatest adversary of human achievement, a self-constructed boundary or barrier which results in steady state operation. Human beings are creatures of habit and can easily become reluctant to change.

Inevitably, stepping outside a comfort zone, perhaps as a result of a 'disorienting' dilemma, raises anxiety level causing a stress response, the result of which is an enhanced level of concentration and focus (White, 2009). Yerkes and Dodson (1907) were the first to investigate the impact of anxiety on performance in their pioneering experiments with mice . Bardwick (1991) relates that they discovered performance improved with anxiety until an optimal level of arousal was reached. White (2009) refers to this optimum level as the Optimal Performance Zone . Beyond this point, in the 'danger zone' performance falls as anxiety increases. The conclusion is therefore that increasing anxiety will boost performance but too much anxiety will decrease performance. In either case it will cause the subject to move out of their comfort zone (Bardwick, 1991).

From a facilitator's perspective therefore, the objective is to move participants to the Optimal Performance Zone for long enough to enable new perspectives and new skills to become embedded.

Schein reports to achieve unfreezing, it is necessary for individuals to disprove the status quo, experience guilt or survival anxiety but at the same time experience psychological safety. " .. unless sufficient psychological safety is created, the disconfirming information will be denied or in other ways defended against, no survival anxiety will be felt and consequently, no change will take place" (1996:61). It is therefore important that facilitators ensure participants feel safe from loss and humiliation before they can accept the new information and reject old behaviours.

- Step 2: Moving. Schein notes that unfreezing is not an end in itself. It ". . . creates motivation to learn but does not necessarily control or predict the direction"(1996:62). Lewin (1947) also states that any attempt to predict or identify a specific outcome from

planned change is very difficult because of the complexity of the forces concerned. Instead, he argues, we should seek to take into account all the forces at work and identify and evaluate, on a trial and error basis .

- Step 3: Refreezing. Lewin (1939) saw this as the final stage of the change process. Refreezing seeks to stabilize and ensure new behaviours are embedded . Mezirow concluded that for learners to change their “meaning schemes (specific beliefs, attitudes and emotional reactions) they must engage in critical reflection of their experiences, which in turn lead to a perspective transformation... ” (1991:167).

The research has shown that Insights Discovery is clearly a more powerful tool when used in groups than with individual participants, and this is explained by the conclusions of Lewin (1947). “Lewin saw successful change as a group activity, because unless group norms and routines are also transformed, changes to individual behaviour will not be sustained” (Burnes, 2004:313). The refreezing process frequently demands that changes are made to organizational culture, policies and practices (Cummings and Huse, 1989).

Although Lewin’s 3-Step model of change has been challenged and criticized (Dawson, 1994, Hatch, 1997b, Kanter et al., 1992) it is nevertheless an influential model of change and can be seen to underpin many change management initiatives (Hendry, 1996) including that of the Insights Discovery intervention.

Transformative learning occurs when participants engaging in critical reflection, challenging long held, common sense assumptions and beliefs. Daloz sees the need to make meaning as the fundamental motive for learning in adults and the impetus for development. "We develop," he writes, "by progressively taking apart and putting together the structures that give our lives meaning" (1986:236). Kegan reports that "the activity of being a person is the activity of meaning-making" (1982:11). Development is a series of transformations of how we see ourselves in relation to others. Jarvis writes that "learning... is the process of transforming .... It is about the continuing process of making sense of everyday experience" (1992:11).

Mezirow (1997) considers critical reflection to be a crucial part of the learning process, and one in which students question their view of the world. He suggests 'rational discourse' as a catalyst for transformation, with participants discussing ideas with their tutor and class mates. The Insights Discovery intervention attempts to do just this, with the profile and workshop taking the role of "disorientating dilemma", challenging participants to alter their world view, acting as a catalyst to challenge assumptions and belief. It encourages discussion and reflection with a view to developing action plans to be instigated post-session.

Over the years, there have been many critics of transformative learning (Cranton, 1994, Taylor, 1998). Mezirow's theory describes a learning process that is primarily "rational, analytical and cognitive with an inherent logic" (Grabov, 1997:90). Boyd and Myers (1988) question this view, putting the emphasis on the emotional/kinaesthetic component, believing the desired outcome of transformation is not autonomy, but a greater interdependent and compassionate relationship with other people. Mezirow's argument that critical reflection is central to transformative learning has also been questioned by Taylor who states that "critical reflection is granted too much importance in a perspective transformation, a process too rationally driven" (1998:33-34).

Grabov views transformative learning as an "intuitive, creative, emotional process" (1997:90). Other research points towards a spiritual connection and raises questions around self-exploration (Dirkx, 1997) and life purpose (Kroth and Boverie, 2000). Newman (2014) likens transformational learning to a spiritual quest, a religious conversion. He compares comments from learners, such as 'I see things really differently now' 'I have really changed my view on the world' to the cries of a reformed sinner 'I was lost but now I'm found'. He speaks of his dislike for the 'pseudo-religious' tone of some transformational learning literature which resonates with the exuberant and at times fanatical quotes published in the Insights Discovery promotional material.

Mezirow (1997) describes the ideal transformative learning environment as safe, open and honest, free from pressure and coercion. He encourages participants to be critically reflective and suggests meaningful ways in which this process could be stimulated e.g. learning journals, group projects, role play, case studies etc. He states that these could

stimulate critical reflection and rational discourse. Mezirow asserts that discussion and exploration result in transformational learning, however perhaps surprisingly; he is not a supporter of the extreme emotional experiences favoured by some facilitators.

These two views of transformative learning are apparently contradictory; one advocating a logical, critically reflective approach and the other based on feelings and emotion. Grabov suggests however that these views are not opposed, attributing differences purely to emphasis, highlighting similarities such as “humanism, emancipation, autonomy, critical reflection, equity, self-knowledge, participation, communication and discourse” (1997:90).

Differing views (Cranton, 1997, Taylor, 1998) suggest that there is no ‘right way’ of achieving transformative learning, indeed experiences will be different depending on the learner, the context, and the facilitator. Cranton (1994) stresses that transformative learning is not the only means of learning and the method may not be relevant for everyone . Taylor (1998) similarly suggests that transformative learning is not suitable for all learners, all facilitators or all learning situations .

Taylor (1998) supports Mezirow’s (1997) view of creating a ‘safe’ transformative learning environment and stresses the importance of trainers building trust and caring, sensitive relationships. Schein (1996) also confirms that participants must feel psychological safety . Loughlin refers to the responsibility of the trainer to create a “community of knowers”, individuals who are “united in a shared experience of trying to make meaning of their life experience (1993:320-321). Boyd and Myers (1988) advise trainers to act as role models and mentors, reflecting on their own personal journey, in order to help others in their transformation. Baumgartner (2001) also emphasizing the importance of developing a trusting and supportive relationship between participants and trainer , claiming that students who view the trainer as overly powerful and dominant, may find it difficult to challenge conventional values, assumptions and beliefs.

Daloz (1986) recognizes that growth can be a risky and frightening journey into the unknown, as students are challenged to let go of old conceptualizations of self and the world. Baumgartner (2001) likewise cautions that transformational learning frequently

provokes powerful emotional responses in both participants and trainers. Daloz challenges trainers to structure their teaching around the personal development of participants rather than developing specific competencies. He frequently uses the metaphor of transformation as a journey in which the facilitator or tutor serves as a gatekeeper as well as a guide for students on the journey .

Transformative learning is widely recognised as a powerful tool for personal learning, and Baumgartner, asks trainers to consider some ethical questions which arise from its use, for example “What right do instructors have to encourage transformational learning?” (2001:21). When transformative programmes require participants to ‘cast off’ their former identity and adopt new ones, it is to be expected that tensions and anxieties will arise (Turnbull and Elliott, 2004).

Facilitators need to be equipped to deal with the emotional side of learning and the grieving phase that ensues when participants realise that their old patterns of thinking, perceiving, beliefs and values are replaced by new patterns (Baumgartner, 2001, Boyd and Myers, 1988). It is impossible to say at the outset what the journey might entail and the possible issues that might be uncovered.

“The journey tale begins with an old world, generally simple and uncomplicated, more often than not, home... The middle portion beginning with departure from home, is characterized by confusion, adventure, great highs and lows, struggle, uncertainty. The ways of the old world no longer hold, and the hero’s task is to find a way through this strange middle land, generally in search of something lying at its heart. At the deepest point, the nadir of the descent, a transformation occurs, and the traveller moves out of the darkness towards a new world that often bears an ironic resemblance to the old. Nothing is different, yet all is transformed. It is seen differently... Our old life is still there, but its meaning has profoundly changed because we have left home, seen it from afar, and been transformed by that vision. You can’t go home again.” (Daloz, 1986).

Daloz expresses the power and drama of the transformational learning journey eloquently, yet the link between personal and organizational learning remains tenuous.

## **2.4 Learning and organizations**

There has been, for many years, considerable concern in the UK related to declining industry and low productivity. Several factors have been blamed for this, including a lack of investment in equipment, archaic financial systems, falling levels of interest in manufacturing, weak change management processes and poor workforce development practices. Surveys confirmed that at the heart of the problem was under investment in human capital, owing to a lack of belief from UK managers that training was a worthwhile investment in terms of profit (Hayes et al., 1984).

As a result, there has been growing support to encourage organizations to invest in training, learning and development, with a view to increase the competitive edge of UK businesses and boost the economy. “Learning is the key to prosperity – for each of us as individuals, as well as for the nation as a whole”(Secretary of State for Education and Employment, 1998:7).

This government imposed solution is entrenched in human capital theory, concluding that individuals, communities and whole nations are poor because their human capital has not been adequately developed. Training, learning and development are therefore regarded by many as central to the success of every organization. The belief is that as managers and employees acquire new skills and engage in learning and development processes, organizational performance is also enhanced, so making “a key contribution to economic competitiveness and social well-being” (Gold and Smith, 2003:139).

Karabel and Halsey see this as a smokescreen, diverting “attention away from structural failures and injustices.... [blaming] victims for their poverty” (1997:15). Keep and Mayhew (1998) likewise challenge the government’s focus on education by stating that up skilling workers may not be the only or best option for survival . There are many

organizations who concur with this opinion, choosing to minimize expenditure on training and who are sceptical about its benefits.

Keep and Mayhew agree that “many employers are pursuing perfectly rational training policies because their competitive strategies do not necessarily require them to up skill their entire workforce” (1998:8). Rees and Bartlett have suggested that the assumption that up skilling and economic prosperity is linked is “dangerously oversimplified” and therefore the personal development model argues for “an increase in capacities to achieve individual self-fulfilment in all spheres of life, not just in economic activities” (1999:21).

UK Governments has extolled the virtues of learning organizations and a learning society, at the same time as encouraging individuals to be accountable for their own learning (Harrison, 2000). “Efforts must be focused on mobilising their commitment and encouraging self-development and lifetime learning” (CBI, 1989:9). The claim that learning is the “key factor for survival, sustainability and competitive advantage at the level of the individual, organization and nation” (McGuire, 2014:6) infers that to remain employable, individuals must be prepared to learn continuously. Gold and Smith (2003) suggest that learning can be both a source of change and also a response to it and can therefore help to make organizations competitive and current in a demanding marketplace .

The idea of lifetime or lifelong learning can be traced back to the work of Dewey, Lindeman and Yeaxlee in the early twentieth century (Jarvis, 1995). Illich and Verne argue however that lifelong learning is “not a symbol of our unfinished development but a guarantee of our permanent inadequacy” and will constantly reassign learners to their place in meritocracy (1976:13). “Compulsory emancipation via lifelong learning is a contradiction in terms” (Coffield, 1999:489) and as long as individuals’ learning is controlled by the organization, it serves organizational needs (Antonacopoulou, 2006). This contradiction is similarly noted by Elliott and Turnbull as they discuss bombardment of employees with ambiguous messages;

“On the one hand, they are entreated to maximize their individual performance through life-long learning, be innovative and creative in their roles and develop

their leadership qualities... on the other hand, they are being encouraged to subscribe to their organization's values (and hence subordinate their individuality) to work towards the organization's vision and mission and be good corporate citizens" (2003:459).

Pedler et al defined the learning company as an organization which "facilitates the learning of all its members and continuously transforms itself" (1991:1), a definition supported by Senge (1990) and Nonaka et al (1994). The White Paper 'Education and Training for the 21st Century (Department for Education and Employment, 1991) and Green Paper 'The Learning Age'(Department for Education and Employment, 1998) heralded a discourse promoting 'lifelong learning' as a means to encourage independent learning and increase control over the workforce. Learning subsequently became a 'hot topic' (Grey, 1998) and " the message of learning became more powerful, depicting learning as an obvious 'good thing'" (Gold and Smith, 2003:140).

Wain (2000) makes the explicit link between lifelong learning and the concept of performativity, tracing its emergence back to the human capital theory and human resource investment discourse of the 1970s. The consensus that lifelong learning is a good thing and individuals will be "able to learn what is relevant for them in ways that are appropriate" appears to have been accepted without question (Edwards, 1991:85). This view is refuted by Coffield who asserts that lifelong learning is a form of social control. He encourages us to reject the idea that "lifelong learning is a wonder drug or magic bullet which, on its own, will solve a wide range of educational, social and political ills" (1999:479).

Gold and Smith refer to the 'learning movement' – a dynamic body providing "discursive and rhetorical resources and support for those who make decisions about training, learning and development" (2003:140). Garavan (1997) reveals that the learning organization, sitting within the learning movement has, despite being idealistic and elusive as a concept, retained its persuasive appeal and strongly influences how managers and others should think about organizations .

The discourse surrounding training, learning and development is dominated by the organizational perspective. The contestable link between training and individual learning, although relatively under researched, is assumed true because it serves organizational purposes (Casey, 1980, Baldwin and Ford, 1988, Antonacopoulou, 1999). HRD is therefore aimed at facilitating the attainment of organizational aims, while at the same time ensuring the full employment of the knowledge and skills of employees. Humanistic HRD adopts a developmental discourse, emphasising self-actualisation and purporting to provide training, primarily for the individual's benefit (Guest, 1999) at the same time as overlooking the objective of increased shareholder return, profit, market share and maximising employee productivity at the least cost (McGuire et al., 2005).

Antonacopoulou criticises organizations who deliver training and development activities in this way, saying that they create uncertainty about whose learning needs are being addressed – the organization or the individual – as well as creating unrealistic expectations about the purpose and worth of the training which often cannot be met. Individuals and organizations may therefore have vastly different expectations about a training intervention, which may influence the way they perceive training initially. “Consequently from the individuals perspective, training cannot be assumed to produce learning, nor that learning is always an integral part of training” (1999:17).

It also cannot be automatically assumed that just because there is governmental endorsement of learning, supplemented by copious initiatives, supporting structures and processes, organizations will buy into it. There is still a lack of evidence to confirm that organizations can actually benefit from training and Antonacopoulou (2001) vehemently challenges the relationship between training and learning and the assumption that one is synonymous with the other.

Concerns are also raised about the multiplicity of factors affecting the effectiveness of training (Mathieu et al., 1992, Noe, 1986) and the difficulties of transferring learning back into the workplace (Baldwin and Ford, 1988, Casey, 1980). Other contestable relationships are suggested between training and financial performance, training and adaptability to change, learning and organizational competitiveness. Despite these ongoing debates, it is nevertheless the general assumption of many organizations that

training can and will provide the conditions for effective learning and so the link between training, learning and improved organizational performance remains strong. (Argyle and Smith, 1962, Thomason, 1988, Harrison, 1992, Ashton and Felstead, 1995, Felstead and Green, 1994).

Antonacopoulou (2001 and 1999) suggests however that although the relationship between training and learning may appear strong on the surface, in practice it may be superficial and mechanistic. She argues that this will become increasingly so as learning interventions focus more on developing the organization than the individual. The link between training and learning may also be compromised by the transfer of learning or lack of it. The definition of transfer of learning being “the learning process involved when a person learns to use previously acquired knowledge, skills, competence, expertise in a new situation” (Eraut, 2004:10).

Literature relating to the transfer of learning suggests that as little as 10-20% of the learning gained from management development is actually applied on the job (Curry et al., 1994). A 2006 study surveying 150 organizations states that less than 50% of employees transferred learning six months after the training (Saks and Belcourt, 2006). These figures may not offer any firm conclusions, but they do suggest an overall poor transfer of learning across the organizations concerned.

Eraut (2004) highlights four variables which he believes are responsible for the level of transfer and which need to be considered in order to improve the process – the nature of what is being transferred, differences in context, the disposition of the participant and the time and effort devoted to facilitating the transfer. It is clear therefore that transfer of learning is dependent on many complex issues and the ‘ideal mix’ may be different in each case. Waller also agrees that the individual characteristics of participants, programme design and work environment are key factors in ensuring learning is transferred. “the ‘transfer climate’ ... is crucial ... because the factors involved can have an influence on both an individual’s motivation to transfer and on their personal capacity to transfer” (2011:9). A participant may be motivated to apply what he has learned, but without the time, energy or mental space to allow this to happen, the learning will most likely be forgotten. Waller stresses that the role of the manager

is essential, both in supporting participants to use the new learning, giving them the opportunities to use it and in providing feedback on their level of performance.

Chiaburu and Marinova (2005) suggest that transfer of learning can be encouraged by involvement of the entire organization . A participant is more likely to adopt behaviours and practices if they perceive them as being valued and important to all levels of the organization. Managers have the power to facilitate the transfer therefore by displaying enthusiasm for learning, demonstrating the required behaviours themselves and providing a supportive environment. Swap et al describe how stories can be used as “powerful conveyors of meaning and tacit knowledge” to demonstrate support for the learning. They suggest that stories that dramatize or illustrate a behaviour or model are more likely to be “believed and acted upon” (2001:264). Stories are powerful in verbal form and their effects can be enhanced further via the use of other media, for example using visual aids around the work environment. The enthusiasm and drive of the programme sponsors, married with high profile promotion and positive storytelling, may therefore account for the instances where Insights Discovery was transferred back into the workplace.

## **2.5 Perspectives on psychometric tests**

### **2.5.1 An overview of psychometric tests**

Psychometric testing has a ubiquitous presence in the world of today and there is a burgeoning market for these ‘off the peg’ solutions. These tests are generally recognised as a useful HRM/HRD tool and they are routinely used in schools, colleges, courts, hospitals and millions of workers are required to take these tests to either secure a job or advance their careers. In their many guises, the one constant is that they all claim to reduce complex, chaotic and changeable individuals into a simple label.

In 2007, Personnel Today reported that 70% of UK companies with more than 50 employees were using psychometric tests, and that worldwide spend in this area was

estimated at being between £1bn and £1.5bn (Rust, 2007). The market continues to grow and they were reportedly used in 85% of FTSE 100 companies (Howard, 2008). These tests have a range of applications in an organizational setting, including recruitment, leadership development, team working and personal development, and may be linked to a desire to increase profits, improve people management or develop a competitive edge (Williams and Dobson, 1997, Jenkins, 2001).

It is now estimated that there are well over 2,500 personality questionnaires on the market including the Myers-Briggs Type Indicator (MBTI), developed by Isabel Myers and her mother Katherine Briggs (Myers, 1962). More than 3.5 million people around the world complete the Myers-Briggs Type Indicator (MBTI) every year (Briggs Myers, 2000). Other similar models include the DISC Personality Profile based on the work of renowned psychologist William Moulton Marston (1928) and The Strength Deployment Inventory test (SDI) developed by Elias H. Porter (1971). These alternative psychometric tools are well documented, as are participant experiences of using them. As this research focuses specifically on the participant experiences of using Insights Discovery and not with the workings of the model itself, it is not considered relevant to make any further or more detailed comparisons with the alternative tests listed above or with participant responses to them.

Ladkin (2005) suggests that psychometric tests can be divided into two categories; Preference based tests and trait based tests . Personality preference tests acknowledge that individuals have the option to select from a range of possible behaviours, but believe that they have preferences that can be exposed via probing questioning. Examples include MBTI (Myers, 1962), Honey and Mumford's Learning Style Questionnaire (1992) and the Insights Discovery model (1988).

Insights Discovery was founded by Andy Lothian and his father in 1988 and it now enjoys success in more than 40 countries worldwide, being used extensively by global companies such as Boeing, Microsoft, BP, Xerox, Merck and BT. It is an online personality profiling tool that uses a colour-coded system to assess an individual's personality preferences. 'Personality' referring to a "more or less stable internal factors

that make one person's behaviour consistent from one time to another, and different from the behaviour other people would manifest in comparable situations" (Child, 1968:83).

It describes the personality in terms of both the dominant conscious energies and the opposing, less conscious energies, while identifying elements of potential development contained within the six attitudinal functions separating the two polar opposites. It differentiates itself from other models as being "simple, practical and fun", claiming immediate impact, simplicity, being easy to remember and implement, recognising everyone is unique and producing a personal profile. "It's like holding up a mirror" (Insights®, 2012).

By answering a short questionnaire online - 25 questions - personality preferences are established and a detailed personal profile is electronically generated which indicates colour energy preference (yellow, red, green or blue), key strengths, weaknesses, suggested areas for development and recommendations on how to improve performance.

Accredited practitioners who deliver this test are charged with emphasising that there is no right or wrong personality type and explaining that personality preferences work in the same way as we have a preference for which hand to write with.

The second type of psychometric test aims to categorise and measure an individual's personality traits. An example of which is the 16 Personality Factor Inventory (16PF) (Cattell, 1943) which uses factor analysis to establish sixteen core factors between for example, 'Reserved: Outgoing' and 'Shy: Uninhibited'. This questionnaire is still used extensively, in particular for recruitment and selection purposes.

All psychometric tests make some important assumptions (Ladkin, 2005) which are the subject of much academic debate. Firstly they assume that personality can be identified, categorized and measured accurately. Secondly, they assume that an individual's personality is distinct and remains stable regardless of the situation and context. Both preference based tests and trait based tests also rely on self-evaluation and self-

awareness for their results. The assumption is therefore that individuals are capable of, and can be trusted to accurately assess and judge their own personality – again a supposition that is strongly contested by many psychology scholars.

### **2.5.2 An historical perspective**

Writer and philosophers throughout history have used similar patterns to explain human behaviour. Greek physician Hippocrates (460–370 BC) considered that certain human moods, emotions and behaviours were caused by excess or lack of body fluids. He constructed a framework based on four ‘humours’; phlegmatic, sanguine, melancholic and choleric and subsequently, Galen (131–200 AD) developed the first typology of temperament looking for physiological reasons for different human behaviours.

MBTI and Insights Discovery are grounded in the work of psychologist Carl Jung (1875-1961). His publication ‘Psychological Types’ (Jung, 1921) established a conceptual framework which described personalities and predicted related behaviours. He proposed that differences in human behaviour are not down to chance, but due to basic and observable differences in how people assimilate and process information. Jung (1921) identified six preferred behaviours or psychological functions, linked in pairs as contrasting preferences that were considered to determine the underlying structure of personality: introversion (I) and extraversion (E); sensing (S) and intuition (N); and thinking (T) and feeling (F). He suggests we all use all of these functions to different degrees but have a preference towards either ‘sensing’ or ‘intuition’ when gathering information, and towards ‘thinking’ or ‘feeling’ when making decisions.

Jung (1921) refers to introversion and extraversion as attitudes that characterise the inward/outward movement of psychic energy. Cited in McGuire and Hull (1997:305) he states “Sensation establishes what is actually present, thinking enables us to recognise its meaning, feeling tells us its value, and intuition points to possibilities as to whence it came and whither it is going in a given situation”.

The interaction of these elements results in the description of eight personality types; extraverted sensing, introverted sensing, extraverted intuition, introverted intuition, extraverted thinking, introverted thinking, extraverted feeling, introverted feeling. Jung recognises however the somewhat idiosyncratic and anecdotal nature of his evidence;

“My scheme of typology is only a scheme of orientation. There is such a factor as introversion, there is such a factor as extraversion. The classification of individuals means nothing, nothing at all. It is only the instrumentarium for the practical psychologist to explain, for instance the husband to a wife or vice versa” (McGuire and Hull, 1997:305).

Somewhat surprisingly, despite his findings, Jung does not believe people should be permanently slotted into one category or another, asserting that everyone is an exception to the rule and to label people would be nothing more than a childish game (Jung, 1921).

### **2.5.2 The perceived benefits of psychometric tests**

Psychometric tests are normatively recognised as a useful HRM/HRD tool and they are routinely used in a range of organizational contexts, from recruitment and selection to leadership development. The excessive demand for these tools is perhaps attributable to their ability to provide a quick ‘off the peg’ means of gather information about employees. Each individual is given a label which removes the need for time consuming observation, discussion and evaluation.

Psychometric tests also claim to explain the reasons behind certain behavioural traits, for example, the Insights Discovery promotes its ability to explain the factors that underlie certain behaviours, thereby raising awareness of how these behaviours may be altered and improved.

“Have you ever wondered what it is that makes you click with someone? You know...that feeling of connection and a certain special something that puts you on the same wavelength as the other person and speaking their language? Fantastic isn’t it? Well, how wonderful would it be if you could tap into that

feeling of connection with other people in your life too? The great news is you can!" (Insights, 2015).

Psychometric tests also profess to provide a 'neutral' language' for discussing aspects of individual personality and behaviour. For example a person who is criticised for their abrupt and direct communication style may gain greater understanding of their actions and their effects on others. Individuals can therefore appreciate that their style is not necessarily a sign of inherent rudeness but just a result of their extraverted thinking preference.

The Insights Discovery tool stresses that colour energy preference should not be used as an excuse. Rather the intention is to highlight individual development needs and encourage creation of an action plan which will develop strategies for dealing with this preference effectively.

Ladkin reveals that in her experience "when a profile accurately reflects someone's understanding of themselves it can give them permission to consider their developmental needs in a more open and accepting way." (2005:37).

A degree of compassion and understanding of self and others can be achieved as well as providing a catalyst for self-reflection and personal development.

### **2.5.3 A critical perspective**

Although Jung (1923) states that preferences and traits are part of the soul and spiritual DNA, this view is not upheld by critics of psychometric tests who question the assumption that identities are constant, or stable enough to be accurately measured. Gergen suggests "a more fluid or nomadic conception of the self, one that is not fixed in any category" (1999:54). Identities are therefore not something that we are born with and exist independently; rather they emerge and develop via significant interactions and experiences. "If this is the case, it would be meaningless to measure personality traits

in an individual as if they were fixed essences, when in fact they are likely to be in a constant state of flux” (Bolden et al., 2011:45).

The first important review of the use of personality testing in organizations was conducted by Guion and Gottier, who conclude that “it is difficult in the face of this summary to advocate, with a clear conscience, the use of personality measures in most situations as a basis for making employment decisions about people” (1965:703). Subsequently, vast amounts of research have sought to disprove their claim and support the notion that personality can be an accurate and useful predictor of workplace performance.

Case and Phillipson (2004) argue that although personality tests are often sold as being of scientific origin, those grounded in the philosophy of Jung (such as MBTI and Insights Discovery) have origins firmly rooted in astrology and alchemy and thus are based on ‘unscientific’ beliefs. In doing so, they demonstrate that the ‘modern’ tools we use today to classify and measure people in organizations are not in fact ‘neutral’ or ‘objective’, but instead are often grounded in historical assumptions that predate the modern era.

Interestingly, Case and Phillipson specifically refer to the Insights Discovery model and remark on its spurious claims. “There is one company that has self-consciously used the alchemical aspects of his [Jung’s] system in their management consultancy practice... Insights Learning and Development Ltd..” (2004:485). They draw attention to the “striking structural resemblance” between the 12th century Rosarium Philosophorum chart, featuring the four elements – fire, air, earth and water, the “Annus-Mundus-Homo astrology diagrams of the Renaissance” which depict the signs of the zodiac and link astrology and alchemy - and the Insights Discovery model. “It is we suggest, a further indication of how this particular aspect of premodern cosmology is being purveyed in a postmodern corporate marketplace” (2004:486).

Labels are evidently used in all aspects of life, helping to simplify and understand a very complex world, having the ability to convey a large amount of information in one word. It is very easy however to fall into the trap of believing we know about a person simply

by their label. “The danger of stereotypes lies not in their existence, but in the fact that they become for all people some of the time, and for some people all the time, substitutes for observation”(Hayakawa, 1950:209).

Thompson and McHugh highlight the link between personality testing and stereotypes, stating that “they help to sort a bewildering variety of information about a person into categories that can be more easily comprehended and evaluated” (2002:234). They go on to discuss how the polarization that occurs as a result is based on limited evidence and serves to promote discrimination and erode diversity.

Morgeson et al conclude their review of personality tests stating that “they are poor predictors of criteria such as job performance and are difficult to justify as a basis for making high-stakes decisions about individuals’ (2007:1032). Some experts have even stronger views and Johnson and Blinkhorn argue that “proponents of the use of personality tests for occupational selection continue to play fast and loose with statistical methods, and to make claims which do not stand up to close inspection”. They go on to say that psychometric tests are not the “worst offenders. But they are amongst the most conspicuous offenders in so far as the impact of psychology on the everyday lives of the population at large is concerned”(1994:167).

Warnings regarding the use of psychometric tests, state that personality tests may be simply substitutes for observation and good management (Hayakawa, 1950, Melamed and Jackson, 1995, Lewis, 1999). They “should provide information which cannot be obtained more easily, cost-effectively or reliably from other sources” (Melamed and Jackson, 1995:14). Lewis (1999) asks if there is a better way for employers to get to know their staff, how they work and what motivates them. He acknowledges his approach is more complicated than using a psychometric test, but recommends that leaders get to know their employees, empathise with them, ask them what is important to them and treat them as individuals.

Pittenger likewise, cautions against over reliance on MBTI and asks those planning to use the test to “take a long look at the value of using personality type labels in their work”(1993: 6). Mumford (1997) states that training is too susceptible to flavour of the

month, advising HRD practitioners to ask themselves why the method used is more appropriate than any other method for a particular need. Are the outcomes to be gained worth the cost involved? Murphy and Dzieweczynski concur with this view, adding that “personality tests used in organizations are still poorly chosen” (2005:343) and “theories linking personality constructs and job performance are often vague and unconvincing” (2005:346).

King and Lawley represent other scholars who question the reliability of personality profiles and their ability to realistically characterize an individual’s personality. “They can be seen as reductionist, that is to say they reduce complex human phenomenon such as personality down to a few figures on a set of scales” (2013:253). Chernyshenko et al (2011) support the view that individual behaviour is not consistent enough across time and different situations to enable personality to be measured. Situation is more influential than personality in behaviour. Personality therefore has only a small role to play in predicting outcomes.

Melamed and Jackson stress that “a good psychometric test must be fit for purpose and the results only interpreted for what it was intended....we need to guard against the untrained and ‘incompetent’ manager using the information in isolation to make judgemental decisions” (1995:12). McGregor recognises that personality tests and a manager’s knowledge of an employee yield at best an imperfect picture, stating that psychometric tests “have genuine value in competent hands” (1972:517).

Thompson and McHugh argue vehemently that personality tests serve only to embed stereotypical beliefs and expectations in organizations, suggesting that they are useful in finding managers who are “male, middle class and middle aged” (2009:283). Paul takes a similarly hostile view, asserting that personality tests are “nothing more than an alluring fantasy or perhaps wilful deception” (2004:221). Wilson is also aligned with this perspective, arguing that “there is worldwide abuse of personality testing”. She asserts that “despite... poor validity, personality tests continue to be used by management consultants to dupe clients and satisfy the demand for assessment of personality” (2010:199).

Nevertheless, despite these warnings, personality tests are generally seen as a functional, innocuous tools and HRM/HRD adopt a normative, and often prescriptive approach as to their desirability and mutually beneficial outcomes.

## **2.6 Summary**

A review of the literature paints a complex picture. It challenges the taken for granted, humanistic approach to HRD and raises the question that there might well be a “multiplicity of purpose” in the use of learning and development. This results in a “dialectical tension” between the intentions and expectations of employers and employees (O'Donnell et al., 2006:2). The power of organizations in determining how HRD is used, whether as a means to provide self-actualization and fulfilment to individuals or as a means to create profit and ‘designer employees’ formed in the image of the organization, is clear. As the humanistic approach is exposed as being uncritically taken for granted (McGuire et al., 2005) this research, aiming to uncover issues relating to the Insights Discovery model that have previously gone unnoticed and unquestioned, is pertinent.

The role of HRD as a provider of self-improvement and empowerment is confronted and their increasing focus on transformation and change revealed. Turnbull and Elliott (2004) explain that practitioners are frequently finding themselves tasked with shaping identities of employees with little appreciation of the impact their actions will have on the lives of their targets (Turnbull and Elliott, 2004). The use of powerful transformational learning tools, such as Insights Discovery, puts practitioners in a hazardous position and they are in some cases oblivious to the potential dangers they are exposing participants to. Transformation learning launches individuals on a journey infused with power and drama (Daloz, 1999), yet little research has been done about the long term repercussions. There is minimal evidence to confirm that organizations can actually benefit from training (Antonacopoulou, 2001), yet it is still considered

acceptable to put employees through highly-charged, traumatic processes – the ends outweighing the means.

The ethical implications of these practices are evident. Holden and Griggs question what right HRD professionals have to force employees “to enter those private, possibly dark and uncomfortable, places of emotion, feeling and attitude on the basis that this is in some way ‘good for them’” (Holden and Griggs, 2011:485). It would appear that their right to do this comes from the power of the organization to dictate what employees do, how they think and how they behave. Foucault recognizes that, in order to acquire productive workers organizations have “to be able to gain access to the bodies of individuals, to their acts, attitudes and modes of every day behaviour” (1980b:125). It could be said therefore that HRD professionals, either consciously or unconsciously, use the vicarious power of the organization, combined with the power of learning and development tools at their disposal, in order to achieve business aims. The ethics of this practice is challenged by Ackers, who asserts that “if we respect people and their rights, there is something unethical about shaping the personality of an individual to suit the organization and expecting that organization to dominate their lives” (1997).

The discourse surrounding learning within organizations is shown as dominated by the organizational perspective and the literature points to the views of individual employees being overlooked. The link between training and individual learning is strong, despite a being considered by many as under researched (Casey, 1980, Baldwin and Ford, 1988, Antonacopoulou, 1999). Perhaps this is a view promulgated by powerful organizations who use HRD as a means to achieve their business aims.

This view is particularly relevant in this research project and highlights the dual role of HRD, on one hand facilitating the achievement of organizational aims, while at the same time ensuring that employees are self-developing and in possession of knowledge and skills appropriate for effective job performance. This duality, and the resulting tension it causes, appears to be discounted by Humanistic HRD. The humanistic view emphasises self-actualisation and purports to provide training, primarily for the individual’s benefit (Guest, 1999) at the same time as overlooking the objective of increased shareholder return, profit, market share and maximising employee

productivity at the least cost (McGuire et al., 2005). The powerful role organizations play in the activities of HRD is therefore clear. HRD practitioners may well be said to be pawns in the game of corporate conformity, colluding with the organization to create 'designer employees'.

The literature refers to psychometric tests as being normatively recognised and useful HRM/HRD tools, which are routinely used in a range of organizational contexts, from recruitment and selection to leadership development. The power of these tests from an organizational perspective is perhaps in their presentation as a 'quick fix' means of gathering and sharing employee information. The label given to each individual eradicates the need for messy, time consuming observation and conversation. From an individual perspective the 'clout' of psychometric tests may come from the organizational belief and investment in the model, the desire to read about ourselves and the convenience of being able to pigeon hole and simplify our relationships with others.

Regardless of the specific causes, the £1.5 worldwide spend on psychometric tools is testament to their influence and power. Despite the fact that authors such as Case and Phillipson (2004) argue that although personality tests are often sold as being of scientific origin, those grounded in the philosophy of Jung (such as MBTI and Insights Discovery) are based on 'unscientific' beliefs. Their conclusion being that although psychometric tests are sold as modern, scientific tools, they are in fact based on historical concepts such as astronomy and alchemy. Wilson (2010) claims therefore that those who sell these tools are doing nothing more than duping clients who are hungry for the latest learning and development fad.

The literature review has presented a complex, power charged picture of organizations and their employees – each expecting different things from learning and development. Despite this however, the predominant view remains that learning is good and therefore any training and development must be a positive activity. HRD is therefore challenged with delivering learning and development interventions that meets these contrasting and contradictory expectations. In the desire to show their organizational worth, serve 'multiple masters' and get a 'result', practitioners may well therefore, use powerful

learning and development tools, sometimes without giving adequate thought and due regard to the longer term implications – the consequences of which we know very little about.

The enticing promise of psychometric tools as a remedy to cure all organizational ills, may in some way be responsible for the ‘gung-ho’ attitude displayed by organizations towards Insights Discovery. There is a suggestion however that this explanation does not present the whole story. Insights Discovery appears to have a certain ‘je ne sais quoi’, an ‘x-factor’ that injects it with a level of power and influence, the like of which has not been previously seen in a transformational learning tool. What this ‘extra something’ is, requires further investigation.

This review of literature has therefore helped create an argument as to why the research is needed, as well as solidifying the research questions. The research questions have therefore been developed as:-

- What are the implications and consequences of using the Insights Discovery tool?
- How can the distinctive power and influence of Insights Discovery be explained?
- How can learning from the delivery of the Insights Discovery tool inform other HRD interventions?

## **2.7 Concluding remarks**

The chapter set out to review literature pertinent to the key elements of the research and situate this thesis in the context of discourses around learning and psychometric tools. It has therefore examined academic literature under the headings:-

- HRD: humanism or exploitation?
- Transformational learning and ethics
- Learning and organizations
- Perspectives on psychometric tests

This chapter has positioned my research against a backdrop of academic literature in order to create understanding of how the discourses combine to present learning and development interventions as unchallengeable, common-sense ways for individuals to improve themselves and organizational performance. It has brought together ideas from outside the traditional HRD field of study, integrating theories from different areas in order to present an argument that the predominant functionalist approach to HRD, particularly in respect of the use of psychometric tools, should be challenged and the consequences considered.

Chapter 3 now goes on to explore my conceptual framework and the concepts, assumptions, expectations, beliefs and theories that underpin its construction.

## **3. Construction of a Conceptual framework**

### **3.1 Introduction**

The previous chapter positioned the thesis against a backdrop of academic literature in order to create understanding of how the various discourses combine to present learning and development interventions as unchallengeable, common-sense ways for individuals to improve themselves and organizational performance. It brought together ideas from outside the traditional HRD field of study, integrating theories from different disciplines in order to present an argument that the predominant functionalist approach to HRD, particularly in respect of the use of powerful psychometric tools, should be challenged and the consequences considered.

This chapter seeks to utilise this academic discourse to underpin construction of a personal framework of concepts, assumptions, expectations, beliefs and theories. The resultant conceptual framework will be a unique construct which will guide me through my research.

As a novice researcher, the notion of developing a conceptual framework was a daunting prospect. My initial assumption was that the task would involve finding a relevant framework already in existence and adapting my work to fit. Clarity on this subject was illusive until I came upon a body of work relating to conceptual frameworks and studied guiding literature. Maxwell explains that a conceptual framework is “a system of concepts, assumptions, expectations, beliefs and theories” (2013:39).. “constructed, not found” (2013:41) ). something to be pieced together. A personal framework built of something old – borrowed bits of existing theory and research – and something new – a structure and coherence developed by the researcher given their own specific research context. Sinclair likens the framework to a ‘map or journey plan’ - “Research is a journey towards an endpoint – to develop new knowledge that will contribute to practice – and a theoretical map provides a guide” (2007:160).

This analogy helped my confidence grow and I began to understand that the function of this theoretical framework was to inform the rest of my design, help me assess and refine goals, develop realistic and relevant research questions, select appropriate methods and identify potential validity threats to my conclusions.

It was clear from the outset that my conceptual framework was set to play a key part in my research design. A conceptual framework “explains, either graphically or in narrative form, the main things to be studied – the key factors, concepts, or variables – and the presumed relationships among them” (Miles and Huberman, 1994:18). It plays a crucial role, as “even carefully collected results can be misleading if the underlying context of assumptions is wrong” (Heinrick, 1984:151). It is also worth noting that this is not something to be worked on at the start of the research and then shelved. Sinclair explains that “the theoretical framework evolves and develops until it becomes refined and burnished, to emerge as a robust outcome of the research” (2007:39).

### **3.2 Epistemological and ontological perspective**

A paradigm is a belief system or theory that guides the way we do things, or more formally establishes a set of practices. Kuhn describes a paradigm as “the entire constellation of beliefs, values and techniques, and so on shared by members of a given community” (1970:175). He states that a paradigm not only influences the questions to be asked but also determines which questions cannot be asked. “This function then is enormously powerful. A paradigm can actually prevent questions from being answered!” (Munhall, 2007:79).

Choosing a paradigm should involve assessing which paradigmatic views best fit with a researcher’s assumptions and methodological preferences. Maxwell describes “trying to work within a paradigm or theory that doesn’t fit your actual beliefs is like trying to do a physically demanding job in clothes that don’t fit – at best you’ll be uncomfortable, at worst it will keep you from doing the job well (2013:44). Guba adds that “it represents a worldview that defines, for its holder, the nature of the ‘world’, the individual’s place in it, and the range of possible relationship to that world and its parts” (1994:107).

According to Guba and Lincoln, the philosophical and methodological paradigms I draw on will form a particularly important part of my conceptual framework and can be identified by my answers to three fundamental questions:

1. The ontological question. What is the form and nature of reality and therefore, what can be known about it?
2. The epistemological question. What is the nature of the relationship between the knower or would-be-knower and what can be known?
3. The methodological question. How can the knower go about finding out whatever he or she believes can be known?

These questions in themselves do not produce the answers, but rather help draw out pre-existing beliefs. "Your decisions about paradigm issues are not entirely a matter of free choice. You have already made assumptions about the world, your topic and how we can understand these, even if you have never consciously examined these."(Maxwell, 2013:44).

Epistemology is the theory of knowledge (Greener, 2011:11). It is concerned with the philosophical study of what knowledge is, and what counts as good knowledge, "the grounds upon which we believe something to be true" (Oliver, 2010:35). As such, "the researcher's epistemological stance is central to the choice of methodology in terms of its purpose and goals" (Snape and Spencer, 2003:1).

A researcher's ontological stance – concerning the reality of the world - and epistemological view – concerning the knowledge of that world – are intrinsically linked.

"In simple terms, an ontological view of knowledge as reality that exists separately from a learner's interpretation means epistemologically, knowledge can be obtained from objective observation, where as an ontological view of knowledge as subject to interpretation means, epistemologically, that knowledge is arrived at through sense-making and meaning" (Jackson, 2013:54)

As a researcher, I have therefore benefitted from determining both my ontological and epistemological stance as these guided and informed the methodology, and "the

decisions made therein are needed to justify the way in which the research brings about new knowledge and the strength of conviction within the research” (Jackson, 2013:54).

My ontological view is that reality is subject to interpretation and this means epistemologically, that knowledge is arrived at through social construction, sense-making and meaning. My epistemological stance is therefore determined as transactional and subjectivist. The investigator and the object of investigation are assumed to be interactively linked so that the findings are created as the investigation proceeds. “The researcher’s epistemological stance is central to the choice of methodology in terms of its purpose and goals” (Snape and Spencer, 2003:1)

### **3.3 Personal beliefs**

When my initial research proposal was written, I had limited knowledge of philosophy and certainly no awareness of my own philosophical assumptions. I was clear from the outset however that my method of research needed to explore individual experiences and interpretations, which I assumed would be different for each participant. This view was not aligned to any formal philosophic standpoint, but rather attributable to my own personal philosophy of life, formed from a patchwork of experiences and long held, pre-existing beliefs. “...one chooses certain elements from different theories and operates according to those principles” (Elias and Merriam, 1980:206). Despite the unconscious and perhaps random development of this personal philosophy, its merits are clear as “it can inform practice, provide guidelines ...for everyday practice... A philosophy offers goals, values, and attitudes to strive for. It thus can be motivating, inspiring and energizing ..” (Merriam, 1982:90-91).

My personal philosophy was an important factor, but my decision making was undoubtedly also influenced by my beliefs regarding the underpinning assumptions of the Insights Discovery model. My overriding and long held belief was that the model had virtuous aims, with perception lying at its foundation, encouraging participants to appreciate differing perspectives rather than tolerate differences of opinion. Covey is

referenced frequently within Insights Discovery to explain the existence of differing perspectives. “Each of us tends to think we see things as they are, that we are objective. But this is not the case. We see the world, not as it is, but as we are – or, as we are conditioned to see it”(Covey, 2009).

Contemplation about conceptual frameworks prompted self-reflexivity to think critically about my own beliefs, biases and assumptions and the role they would play in (prior to and during) my research. In particular, I was alerted to the influence my actions, language and conversations would have during the interview and understanding process.

My view has always been that the human mind is uniquely powerful in determining meaning – it has a choice, consciously or unconsciously whether it interprets experiences as positive or negative. These beliefs are supported and expanded on in the Phenomenology of Perception (Merleau-Ponty, 2002) which claims that nothing has meaning unless that meaning is bestowed on it by our consciousness. “We must not therefore wonder whether we really perceive a world, we must instead say: the world is what we perceive” (2002: xviii). Transcendental idealism (Kant, 1781) likewise confirms that we cannot know what things are like beyond their appearance to us. Kant reports that we do not perceive or experience a pre-existing world. Our minds impose structure on the data our senses receive from the world which in turn creates the world we see.

‘The Social Construction of Reality’ (Berger and Luckmann, 1966) is considered by many to herald the emergence of Social Constructionism, however it is perhaps more accurate to say the book presents a formal recognition of this pre-existing epistemological view. “It would be misleading to say ... that the movement is of recent origin.... the roots of the movement may properly be traced to earlier eras...” (Gergen, 1985:266).

Social constructionism challenges many long held beliefs, “sometimes called a movement, at other times a position, a theory, a theoretical orientation, an approach: psychologists remain unsure of its status” (Stam, 2001:294). Regardless of its label, there are many subtleties of social constructionism existing below the surface and the

views and assumptions of those academics that support this paradigm, range from subjective reality – where individuals make meaning within social situations - to intersubjective reality – where meaning and reality is created with others “There is no I without you” (Shotter, 1989). Relationally Responsive Social Constructionism is just one strand of thought under this heading and carries its own views on how we construct meaning – namely that;

“we create a sense of and meanings about, our social surroundings and ourselves in conversations and interactions with those around us. In doing so, we see our surroundings as having some sort of substantiality. In other words, they do not become real: they have a quality of seeming real to us, which plays back into our conversation as we talk about ‘organizations’, systems, leaders etc.” (Cunliffe, 2008:129).

This perspective views experience as intersubjective, dialogical and dialectic - an embedded form of knowing which exists unconsciously and is often intuitive in nature. “The focus is on social reality because there is no fixed, universally shared understanding of reality – but how people shape meaning between themselves in response to dialogue” (Cunliffe, 2008:128).

Reality therefore exists in the eye of the beholder, constantly changing and shifting as we mould and shape our understanding and construct meaning during our interaction with other people. “We come to be aware that each truth about ourselves [and others] is a construction of the moment, true only for a given time and within certain relationships” (Gergen, 1991:16).

The goal of interpretive research is to understand and interpret human behaviour rather than to generalize and predict causes and effects. Participants are encouraged to consider personal views and beliefs, to explore their ‘embedded, intuitive knowing’ and consider how this impacts on their social reality and the living practices of their organization. It is important to understand motives, meanings, reasons and other subjective experiences which are context specific (Hudson and Ozanne, 1988). It demands that the researcher, who is entrusted with the arduous task of unpicking and attempting to make sense of multiple realities (Lincoln and Guba, 1985), is receptive to

the meaning of interactions and dialogue. Language and discourse are the “means by which humans constitute and order their social realities” (Hatch, 1997a: 276).

Cunliffe (2008) suggests that social constructionist research should begin with clarification of the researcher’s ontological and epistemological assumptions. It is a given at this stage that the basic assumption is that reality is socially constructed, however there are many subtleties of social constructionism and the views and assumptions of supporting academics, range from subjective reality – where individuals make meaning within social situations - to intersubjective reality – where meaning and reality is created with others. As a researcher the decision whether to adopt a subjective or intersubjective approach was a complex one - whether the research focuses on how individuals make sense of their surroundings (subjective) or on how our social world emerges continually as we interact with others (intersubjective). Cunliffe (2008) helpfully offers a ‘continuum of choice’, and refers to clouds that overlap and merge in a variety of shifting forms. She emphasises the subtle differences in each, which thankfully allowed me to opt for a ‘middle of the road’ approach, sometimes considering subjective institutional practices, symbols and power infused processes and sometimes considering how people create meaning and realities in spontaneous, responsive ways.

The implications of adopting a social constructionism approach to my research were widespread. I was prepared for the process to be ‘messy’ and unpredictable, organic in nature, in clear contrast to the apparent certainty of positivistic research. Cunliffe (2008) warns that the outcomes will be an unknown entity, a rich tapestry of communication – strained through the many and variable filters of the researcher. Understanding is formed from dialectic interplay, the back and forth conversations and communications which help to make sense of the world around us. Language lies at the heart of communication and therefore it plays a major role in socially constructing meaning and reality. “Speaking isn’t neutral or passive. Every time we speak, we bring forth a reality. Each time we share words we give legitimacy to the distinctions that those words bring forth” (Freedman and Combs, 1996:29).

Cunliffe (2010) highlights that talking about ‘the organization’ as existing and factual is more consistent with an objectivist than a subjectivist or intersubjectivist approach and

therefore fraught with difficulties,. She advises to discuss more tentatively, possible meanings and interpretations. Researchers are therefore required to test and challenge their own assumptions and consider how the interactions impact on them, on their reality, the participants, the research process and the creation of meaning and conclusions.

Many academics challenge social constructionism for “its internal contradictions. These include its incapacity to assert anything at all given its claims on the nature of language, objects, reality, and the like...” (Stam, 2001:292). This presents an issue for interpretism as the positivist approach is predominant in business and organizational studies. Social constructionist research is not about objectivity however. How can the subtlety of language and intuition be quantified in such a way? By its very nature it is not replicable, generalisable or predictable. It is a complex mix, a coming together and a creation of something which exists just in that one moment. It is however about rigor, transparency, internal validation and integrity. It is important therefore that my research is seen to be all these things.

Rigor was achieved, firstly, by looking reflexively at my role as a researcher and unravelling my inner complexities. What were my underlying assumptions, thoughts, beliefs, biases and motivators? These acted as filters through which my data passed and therefore dramatically affected the conclusions made. Erickson recommends having a constant self-dialogue, keeping diaries and extensive records. “I think that it is best to make the research process as reflective as possible” (1973:14). He suggests it would be appropriate to “step back, move to a higher level of abstraction and ask questions which would define more clearly the terms of inquiry” (1973:16), seeking feedback from other researchers and colleagues to clarify concepts and regain insight.

### **3.4 Consideration of an alternative paradigm**

In order to analyse and justify my approach more fully, it is beneficial at this juncture to follow Erickson’s (1973) advice and take a step back to consider other alternative

paradigms and their relevance to my research. Potential challenges to my preferred approach, first and foremost, were that it lacked scientific rigor. It is possible to ensure claims are defensible and reasonable; however there is no way to tangibly measure consequences or implications. From a social constructionist epistemology, I could only enter into dialogue with individuals and attempt to understand and unravel the meaning they had given to this intervention, psychometric tool and surrounding events.

Psychometrics is the branch of Psychology devoted to the study of individual differences and psychological and educational assessment. Since its beginnings in the early 20th century, the field has been realistic in its orientation, based on the ontological assumptions that psychological attributes such as intelligence and behaviour exist and can be measured. According to Cronbach and Meehl (1955) psychological and personality constructs are “postulated” or inferred characteristics or traits of a person. Many concepts or constructs in psychology are not tangible, for example it is impossible to physically see personality traits, they are simply made to appear more concrete by complex tests that are set up to measure them. Because psychometrics and their positivistic claims appear to be at odds with social constructionism, my approach has been frequently challenged. I assumed throughout that these challenges were based on misunderstanding of my research aims, and it has therefore been very important to reiterate not only what my research was investigating but also what it was not.

My aim was not to validate the Insights Discovery model or any other psychometric tool. I did not set out to prove ‘it works’ or ‘does not work’. Rather my aim was to uncover individual interpretations of a learning intervention involving a psychometric tool and investigate its legacy – what it leaves behind after the intervention. To some this was a disconcerting departure from the conventional functionalist treatment of psychometric tests and many colleagues tried to persuade me of the need to use quantitative methods to accurately measure the results. This was perhaps because most HRM research is firmly embedded in a positivist paradigm. HRM and organizational studies predominantly focus on cause-effect relationships and statistical studies (Mendenhall, 1999, Brewster, 1999). It is implicit within this positivistic ontology and epistemology that if best practice is followed, desirable outcomes are likely to be achieved. Therefore,

it is assumed that valid and reliable research methodologies need to be used in order to uncover these cause-effect relationships.

The Insights Discovery model is sold as a 'real entity', a functionalist tool, a 'thing' that exists and according to the promotional literature, "spreads enthusiastically" across organizations "at the speed of light". We are told that the "Insights colours are invaluable for gaining greater self-awareness and a better understanding of other people" (Insights, 2015). In other words, bringing order to an organization, creating social unity and solidarity by promoting shared norms and values - value consensus. Organizations in this respect appear to mirror schools, who according to Durkheim (1982) represent a miniature version of society in which people live and work . Parsons (1937) argues that schools take over the primary socialization role of parents providing a bridge between the 'particularistic' values given by the family (values which take account of individual skills, abilities and habits) and the 'universalistic' values which are those given to everyone . It could be said that HRD adopts a similar parental role when using Insights Discovery interventions. There are familiar echoes of 'you need to get along with each other', 'play nicely', and 'we know what's best for you'.

A realist ontology and positivist epistemology may offer a workable alternative to social constructionism, bringing certainty and assurance, stating that reality exists 'out there', constant, absolute and the same regardless of who observes it. The inference is that reality exists and can be discovered and measured. Any consequences of using the Insight Discovery model will be either there or not there – they will be real and measurable. The initiative will be prescriptive and have an 'effect', the degree of which can be measured and reported on in an objective way.

My beliefs in this regard are challenged by Weber who invites the reader to revisit the key assumptions regarding differences between positivism and interpretism. He claims that these differences are simply rhetoric built on "false assumptions and tenuous arguments"(2004: iii) and "if any indeed exist, are shallow rather than deep"(2004: x). Weber concludes "it is time for us to move beyond labels and to see the underlying unity in what we are trying to achieve via our research methods"(2004: xii). "Excellent researchers simply choose a research method that fits their purposes and get on with

the business of doing research” (2004: xi). This appears to concur with my own view that whilst I may decide to change my research method depending on the situation and my research goals, my philosophical beliefs are deep rooted and cannot be cast aside so easily.

Accepting that the lines between positivism and interpretism are not so clear cut and that researcher bias will be present - positivists “understand that they affect the qualities of a research object any time they try to measure them” (2004: vii) - has helped me to accept more confidently my chosen approach and research methods as being appropriate to this particular research at this particular time.

### **3.5 Critical thinking**

In order to challenge the functionalist view of the tool, there is a strong rationale for carrying out my research from a critical standpoint. Critical subjectivity refers to

“a quality of awareness in which we do not suppress our primary experience; nor do we allow ourselves to be swept away and overwhelmed by it; rather we raise it to consciousness and use it as part of the inquiry process” (Reason, 1988:12).

Mezirow states that “by far the most significant learning experiences in adulthood involves critical reflection, reassessing the way we have posed problems and reassessing our own orientation to perceiving, knowing, feeling and acting” (1990:13). It was hoped therefore that looking at the use and after effects of Insights Discovery through a critical lens would allow me to uncover more about the problematic nature of these interventions, the conflicting interests of those instigating and participating, and the role power plays in the post-intervention outcomes. Fundamentally, critical thinking is about approaching an issue with scepticism and doubt, rather than with unquestioning acceptance - questioning whether the ideas, arguments and findings represent the bigger picture. Thorough analysis and evaluation of information was crucial in order to identify assumptions and go beyond the superficial surface. King suggests that critical thinking can be enhanced by asking thought provoking questions “What are the implications of...?” “What are the counterargument for...?” (1995:14). Cottrell claims

that "good critical thinking includes recognising good arguments even when we disagree with them, and poor arguments even when these support our own point of view" (2005:47).

Looking through a critical lens allowed me to explore meaning and the underlying assumptions surrounding these learning interventions. It allowed me to unpick the contradictions and tensions that exist between the various stakeholders and examine the social and organizational contexts in which they occur.

The personal impact of challenging my beliefs and assumptions should not be underestimated. Since becoming an accredited practitioner of the Insights Discovery model I have accepted as true, without question, the promotional rhetoric. I have been an active cheerleader, ensuring that the model continues to be used. My unitarist, perhaps naïve, view saw me accepting without question the following assumptions:

- Insights Discovery interventions are good and lead to positive change for everyone.
- Insights Discovery leads to improved communication which in turn improves organizational performance.
- Participants benefit from sharing and discussing the outcomes of the test in an open forum.
- When participants are resistant to the model it is because they are not aware of the benefits that will come from its use.
- Although sharing the results of the test may be uncomfortable for individuals, it is a price worth paying for the ultimate good of the team and the organization.
- A mix of colour energies in a team and organization is good and organizations respect this, valuing them all equally.
- Stakeholders realise that individuals are a mix of all four colour energies and therefore do not stereotype.

Challenging these long held assumptions was the first stage of my exploration. I was well aware that Insights Discovery may be viewed as all or none of these things or other things which would unfold as I pursue my research. I was prepared that my

investigation may uncover a paradox of 'contrary opinion' and result in a multiplicity of unanticipated outcomes.

### **3.6 Determinism or free will?**

Personality is defined by psychologists as the characteristic patterns of thoughts, feelings, and behaviours that make a person unique. Hampson explains that implicit personality is used in "an informal and often unconscious way" (1988:5). Linkages between personality characteristics such as 'warm' 'friendly' and 'sociable' enable us to build a picture of an individual based on limited information. "These beliefs help us to simplify and organise our social world by enabling us to categorise people in terms of their personality characteristics in ways which then allows us to make predictions about their future behaviour" (1988:7). This 'trait' approach to 'personality' is expanded on by Feist and Feist who define personality as a "pattern of relatively permanent traits and unique characteristics that give both consistency and individuality to a person's behaviour"(2008:10).

Consideration of these "relatively permanent traits and unique characteristics" raises the question of where these traits and characteristics emerge from. The matter of determinism or free will was therefore a fundamental question that had huge implications on my research. If participants are not responsible for their own behaviour then any attempt to change their behaviour and attitude is futile. The Insights Discovery model appears to suggest that our personality is determined and something that we must attempt to adjust and adapt to suit other people and different situations.

#### ***Determinism***

"To those who believe in determinism, the stability of the universe depends upon the laws of cause and effect, and freedom is only an illusion" (Nelson, 1991:327).

Behaviourists are strong believers in determinism, although there are many forms.

Strict determinism has the assumption that “every perception, every decision, and every act [is a] link in a chain of causes whose ultimate origin lies outside the individual” (Nelson, 1991:327). Environmental determinism also sees the cause of behaviour coming from outside the individual. For example, some assume that children who live with abusive parents are pre-determined to become abusive parents themselves simply through the process of observing and imitating them (Bandura et al., 1961). Another view is the genetic or biological determinism influences behaviour from the inside via our genetic makeup. Evolution consequently governs the behaviour of a species and the genetic legacy that each person has. Personality traits therefore are a result of “neuronal activity and brain physiology” (Nelson, 1991:328). Autonomous human beings do not exist, instead we are merely biological machines. Hyman explains that “the behaviour of an organism is determined by three classes of factors: previous experience, current environment and the structure of the organism. The human brain is structured in such a way as to cause humans to experience free will, even though their behaviour is in fact determined”(1994:143).

Positive and negative reinforcers are the actual cause of human behaviour and ‘free will’ and ‘motivation’ are merely illusions. It is our lack of awareness of the environmental factors that influence our behaviour that fool us into assuming that we have freedom of choice (Skinner, 1957, Skinner, 2002). “Autonomous man is a device used to explain what we cannot explain in any other way. He has been constructed from our ignorance, and as our understanding increases, the very stuff of which he is composed vanishes” (2002:200).

Baum affirms that metaphysical determinism is “the notion that [personality] is determined solely by heredity and environment” (1994:11). “Determinism asserts that free will is an illusion based on ignorance of the factors determining behaviour...all behaviour originates from genetic inheritance and environmental effects” (1994:15).

“If carried out to its logical extreme, the assumption of strict determinism would lead then to unpalatable conclusions – for example, that Mother Teresa does not deserve praise for her work among the poor and that Adolf Hitler did not deserve blame for his acts of genocide, because neither was free to choose otherwise. This also means that strict determinism is incompatible with the legal system,

which assumes the existence of free will in order to hold criminals responsible for their actions” (Slife et al., 1999:34).

Mother Teresa’s behaviours therefore are interpreted as the interaction of her genetic makeup with the environment to cause her philanthropic actions. Criminals likewise should not be blamed for their wrong doing as their actions have been caused by the same interaction of genetics and environment. Skinner (2002) considers that a law breaker is propelled by their environmental and historical experience and therefore criminal activity is predestined and unavoidable. For honest and obedient citizens a mixture of reinforcers reward them for following the rules and ensure they continue to do so. Every action and behaviour is therefore triggered by stimulus . The normative concept of personal responsibility is removed by metaphysical determinism. Baum argues that “Behaviour analysts argue that as long as we go on assuming free will, we will fail to solve our social problems” (1994:152).

Bandura et al (1961) speculates that personality is the product of three dynamic interacting forces: environment, behaviour, and personal characteristics. Behaviour is explained as a person's skills and actions. Personal characteristics include thoughts, emotions, expectations, beliefs, goals, values and perceptions. Environment is considered to be a person's social and physical surroundings. All three systems interact with each other; therefore, a change in one will influence a change in the other two. Bandura et al (1961) called the constant interaction among these three factors reciprocal determinism, indicating that people do have a say in their future, because of reciprocal interactions .

One implication of determinism is that freedom and choice are not possible. People may appear to make choices but all these are in fact determined by past environmental and genetic causes. This is a controversial claim as accountability and self-discipline lie at the heart of our society and determinist views are clearly inconsistent with moral and legal obligations.

Assumptions on whether human agency is unconscious and involuntary or purposeful and goal directed links directly with the debate on determinism and free will. It thereby

raises questions about personal responsibility and the implications for learning and personal change.

### ***Free Will***

The humanistic approach is based on the opposing assumption that human beings have free will to act and behave as they wish, making life choices and dealing with the consequences of our actions. “The freedom of self-determinism...decision independent of external constraint but in accordance with the inner motives and goals of the actor” (Runes, 1962:112).

There appears to be no one predominant theory supporting free will, however, there is a common concurrence that people do enjoy a sense of freedom (Dorpat, 1987, Nelson, 1991). Freedom is defined as “an ever changing phenomenon” (Nelson, 1991:335), the internal feeling an individual experiences either in the moment of or immediately following the decision, that the decision was without constraint and that they could have made different choices if they had chosen to do so. Nelson states that “freedom gradually emerges; and its limits expand or contract, depending upon physical and environmental circumstances ... Sometimes those limits may be so rigid and restrictive that behaviour is essentially determined by physical and environmental conditions; but even in extremely adverse circumstances, some degree of freedom is present on the perceptual and intentional levels”(1991:335).

Others assert that this sense of freedom is in itself tangible evidence of ontological free will (Frankl, 1959, Runes, 1962), or at least that humans have an “immediate powerful, common sense intuition that they are free and that while such an intuition could be false, it puts the burden of proving so on the deterministics “(Burr and Goldinger, 1984:20).

Some theorists suggest that belief in free will is an illusion (Immergluck, 1964, Smilansky, 1992). Smilansky accepts however that if this view was accepted by the mass population there would be widespread negative consequences. (2000:). He therefore warns that if

these beliefs were to be destroyed, the results would be catastrophic: “the difficulties caused by the absence of ultimate-level grounding are likely to be great, generating acute psychological discomfort for many people and threatening morality” (2000:166).

Humanistic psychologists however assert that free will is possible and crucial to becoming self-actualized human beings (Maslow, 1943, Rogers, 1951). “The idea of free choice and self-determination are fundamental to the development of self-actualization” (Nelson, 1991:329). Self-actualisation is therefore seen as a unique human need which creates motivation and sets us apart from all other species.

An example used by McLeod (2013) is that when two chemicals react together they behave in a certain and set way. There is no thought that they could behave in any other way. When two people meet and interact however, they may potentially agree, disagree, argue, come to a settlement, become aggressive etc. The possibilities and permutations are endless and in order to understand their behaviour we need to understand the choices made by each individual person .

Freud (1921) lies in the middle of the deterministic - free will continuum . Although he is cited as being a biological determinist, arguing that all our thoughts and actions are directed by the instinctive, unconscious mind, this appears to contradict Freud’s goal, which was to help his clients to overcome genetic and environmental forces. Therapy and learning have at their heart the belief that individuals have freedom to change. This contradiction is controversially explained by Needleman who states that “all that psychoanalysis can do is provide the patient with the illusion of freedom” (1963:108).

Freud’s followers or neo-Freudians have taken up this approach. One of the most influential is Fromm (1941) who argues that fear prevents us taking control of our lives. He questions the reasons why the ‘working classes’ seem particularly afraid of freedom and appear to be happy to relinquish it, allowing themselves to be controlled and governed by other people, circumstances or unfounded feelings. Fromm asserts however that determinism is not inevitable and that human freedom is a choice we can all make.

Psychologists that accept the existence of free will, consider that determinism fails to appreciate the individuality and dignity of human beings, serving to devalue human behaviour and independence. The removal of individual responsibility provides a readily available excuse for anti-social or immoral behaviour, as seen when participants use their colour energy to justify their negative actions - "I'm red so I can't help but be rude..".

In the context of this research project, it did not seem appropriate to adopt either a purely deterministic or free will approach. Soft determinism offered a middle ground, and was an approach adopted by Adler;(1956:). It suggests that behaviour is not a passive reaction, but rather an active response to both internal and external forces. This presents a scenario where the individual does have a choice but their behaviour is always influenced to some degree by biological or environmental forces.

Human brains are the most complex computational entities we know of. We compute vast amounts of information at many different levels, and we are only ever conscious of the smallest percentage of our vast subconscious mind. It is clear therefore that the concept of freedom in relation to human behaviour will continue to be explored and the arguments between free will and deterministic thinkers will persist (Pereboom, 1997, Goodman, 1998). Westcott argues that "the arguments mounted so far .. are trying to get at ultimate truth, and they beg the question as to whether there is one truth or alternative truths. Clearly there is one truth concerning free will: either it is or it isn't"(1988:18). Goodman similarly highlights the complexity of the debate in saying that "a solution to the problem of free will in a deterministic science eludes even the greatest thinkers"(Goodman, 1998:160).

From a social constructionist standpoint, there are multiple truths, and it is therefore impossible to say whether freedom exists or otherwise. The philosophical assumptions we make are liberating and constraining at the same time. We are without doubt influenced by our history and our beliefs, however by increasing our awareness of these influences we can reduce the constraints and open ourselves up to new possibilities.

### **3.7 My position as deliverer/researcher**

I was aware, even before commencing my research, that the experience would change me as a person, both professionally and personally. I began to realise very early in the process that challenging the assumptions of the Insights Discovery model and the intervention would at the same time challenging my own assumptions, values and beliefs. My role as seller and deliverer of the Insights Discovery model ensured I was inextricably linked to the intervention and its outcomes. I could not pretend to be a detached and objective observer – I had a strong emotional engagement with the model and the participants, and I have many mixed feelings about them.

The change in my personal perspective has also been illuminating and at times uncomfortable. Since being certified as a facilitator, I have been an active promoter of Insights Discovery, 'singing its praises' and ensuring that the use of the instrument is continued. Now, in an unexpected twist of events I have adopted an opposing view, conducting a critical review of its implications. This change in standpoint created many personal issues, forcing me to question my previous thoughts and actions. Had I been unknowingly brainwashed by the functionalist view predominant in mainstream HRD (Armstrong, 1999)? Had I been unwittingly drawn into the Insights Discovery 'cult'? Beliefs are powerful and make up our map of the world, shaping and influencing our actions and behaviours. Question our beliefs and everything changes.

This multifaceted role presented many complex issues, including my relationship with the participants. I have acted as a sales person for the tool, facilitator and now researcher. I therefore considered if there would be psychological pressure on interviewees to respond positively given my relationship with them – either because I sold the tool or because they bought it. I also thought about the 'tutor' and 'student' power differential and the possibility that it would skew results. From a positivist view, the role of an independent, unbiased observer is reasonable and obtainable. This paradigm assumes rational and logical research and assures that it is possible to extract 'true' data despite previous roles and relationships. However in order to achieve this, positivism expects detachment from participants and the ability to be emotionally

neutral, allowing important differentials to be made between fact and personal experience (Carson et al., 2001, Hudson and Ozanne, 1988).

I believe however, that my approach to this, and any future research projects, is more fundamental than simply making a choice of 'what hat to wear'. My beliefs and understanding existed long before my exposure to philosophical issues. I may have the ability to take a positivist view, but I did not view this approach as appropriate given the particular, specific set of circumstances and the questions I hope to address. It seems ludicrous to suggest that my research would not be affected by the large amount of 'baggage' I brought to the process - I cannot unknow what I know or unsee what I have seen.

As an "embodied and embedded" (Cunliffe, 2010:654) researcher, I encouraged discursive conversation –'reflexive dialogical practice' – to uncover tacit, embedded assumptions hidden in our ways of talking and communicating with each other. Although on the surface interviewees appeared to have similarities i.e. work in the same organization at the same level, have attended the same workshop, their experiences were fundamentally different – each experiencing a reality that was unique to them, formed as a result of their interactions with others. Boje seeks to illustrate this by using the analogy of 'Tamara' – a uniquely staged play, where the audience follow a character of their choosing. "No audience member gets to follow all the stories since the action is simultaneous, involving different characters in different rooms, on different floors" (1995:999). It is accepted therefore that my knowing was not be all encompassing – just a snap shot of that particular event taken at that particular time.

The social constructionist ontology therefore offered a welcome view that appeared to understand and accept my predicament without question. I can never be a detached, objective observer. This view concurs with Lippmann (1997) and his controversial review of the press in which he suggests that reporters can never move beyond their own biases and so objective reporting is impossible . My research reported 'their reality via my reality'. Our views and opinions fused to deliver joint interpretation and understanding.

The benefits of subjective research are extolled by many influential writers. “The most admirable scholars within the scholarly community... do not split their work from their lives. They seem to take both too seriously to allow such dissociation, and they want to use each for the enrichment of the other” (Wright Mills, 1959:195). “Separating your research from other aspects of your life cuts you off from a major source of insights, hypotheses and validity checks” (Maxwell, 2013:45).

The view that my personal baggage was something to be valued rather than subdued was an exhilarating prospect and was something that played a vital part in this research.

“The subjectivity that originally I had taken as an affliction, something to bear because it could not be foregone, could, to the contrary, be taken as “virtuous”. My subjectivity is the basis for the story that I am able to tell. It is a strength on which to build. It makes me who I am as a person and as a researcher, equipping me with the perspectives and insights that shape all I do as a researcher, from the selection of topic clear through to the emphases I make in my writing. Seen as virtuous, subjectivity is something to capitalize on rather than to exorcise”(Glesne and Peshkin, 1992:104).

Strauss emphasized many of the same points in discussing what he called “experiential data” – the researcher’s technical knowledge, research background, and personal experiences. He argued that “experiential data should not be ignored because of the usual canons governing research (which regard personal experience and data as likely to bias the research), for these canons lead to the squashing of valuable experiential data. We say, rather, mine your experiences, there is potential gold there!” (1987:11).

### **3.8 Research questions**

The literature review discussed in Chapter 2, presented a complex, power charged picture of organizations and their employees – each expecting different things from learning and development, and their HRD practitioners. In their bid to serve ‘multiple masters’, practitioners found themselves using powerful learning and development tools, sometimes without giving adequate thought to the consequences, in respect of

both the subjects and the organization concerned. The review of literature therefore helped to solidifying the research questions;

- What are the implications and consequences of using the Insights Discovery tool?
- How can the distinctive power and influence of Insights Discovery be explained?
- How can learning from the delivery of the Insights Discovery tool inform other HRD interventions?

These research questions play a critical role in my conceptual framework because they identify something that is going on in the world, with consequences that are potentially problematic.

The research is thereby justified because it gives a voice to participants. McKenna explains that in “HRM specifically the voice of the individual employee has rarely been elevated. Important contributions to the study and practice of HRM can, therefore clearly be made by elevating this voice”(McKenna et al., 2008:124).

In addition, the implications of using psychological profiling are not fully understood and we do not adequately know how to deal with what follows. This assertion is confirmed by Elliott and Turnbull who conclude that the short and long term impact of change interventions on participants is an under researched area. “Much of HRD is concerned with identity shaping” (2004:191) and they ask “ those involved in the design and delivery of HRD programmes to consider the immediate and longer term political impact of such programmes on other facets of their lives” (2004:199). For these reasons, the “implications of the identity-shaping role of HRD and the moral as well as social repercussions” warrant further investigation (2004:191).

It is thus of the utmost importance that further information and knowledge is gained in this area.

### **3.9 Ethical considerations**

Research conducted from a social constructionist paradigm raises some fundamental ethical questions. It assumes that the human race is intrinsically linked and that we make meaning of the world constantly through our interaction with each other. If we are jointly responsible for creating meaning, we are impacting on all aspects of the world all the time. We therefore have a joint responsibility to behave ethically and create 'ethical dialogue'. If we accept the notion that there is no universally shared meaning, then we are each responsible for protecting the rights, views and interpretations of others (Cunliffe, 2008).

As a researcher it has been important that I reflect and identify my own ethical framework as the results fundamentally affect my methodological approach and the interpretations of the findings. These rules and principles cannot be chosen or discarded at will, rather they are an integrated, embedded part of a person. Deontological ethics – concerned with doing the right thing regardless of the consequences – does not 'feel' right to me. This duty bound view sets absolute rules and has no consideration for intention or the complexity of the situation. 'The end can never justify the means'.

The absolute and rigid nature of this approach appears to be at odds with the social constructionist opinion that meaning is constructed via individual interaction. This black and white view does not lend itself to varying interpretations and consideration of different experiences and opinions. Its logical approach appears to take emotion out of the equation – an ingredient which is necessary for social constructionism. The ability to build relationships with interviewees relies on rapport building language, consideration of other people's feelings and sensitivity – something that does not easily fit with a truth at all cost mentality.

The need to consider ethics is emphasized by Russ-Eft who assert that we "will have a future only if we start to acknowledge our role in developing sustainable workplaces/organizations. If we as HRD professionals continue to assume a subordinate

role in organizations that are unethical and socially unresponsive then we are complicit” (2003:302).

As I result, I thought long and hard about the ethical implications of my examination of the Insights Discovery psychometric test. In seeking to challenge and uncover previously unobserved facets of a tool that I had judged virtuous and unequivocally beneficial had ramifications that are far reaching and potentially disruptive. In challenging the Insights Discovery model I was in the same instance challenging my own internal assumptions and the beliefs I hold about myself, about learning, personality and about the workings of organizations. This research, therefore, had the power to challenge the validity of my beliefs and cause me to question my understanding of the world and my place within it, therein shattering prior assumptions, a process which was, as anticipated, accompanied by a degree of psychological discomfort.

I have chosen to draw parallels with Posttraumatic Growth (PGT), a phenomenon described by Tedeschi et al as “both a process and an outcome... a cognitive process that is initiated to cope with traumatic events that extract an extreme cognitive and emotional toll” (1998:1). Comparisons are made with an earthquake that leaves mass destruction in its wake. A period of confusion and mourning precede the rebuilding of new, better and stronger structures and in the aftermath of the disaster it is possible to reflect on, not only what has been lost, but also the positive outcomes that have taken place as a result.

Psychologically, this is a process akin to that which I took part in. The ‘trauma’ of the research called into question my basic assumptions about the present and the future and therefore it inevitably produced anxiety and stress. “Inherent in these traumatic experiences are losses such as the loss of loved ones, cherished roles or capabilities, or of fundamental, accepted ways of understanding life” (Tedeschi et al., 1998:2). However, in the face of losing what is known and facing the unavoidable confusion and disruption that follows, the possibility will present itself to rebuild a superior way of life. This has the prospect to produce new found strength and a positive outlook through what Janoff-Bulman (2010) refers to as shattering of assumptions and the rebuilding of the “assumptive world” . Parkes describes the “assumptive world” as “a strongly held

set of assumptions about the world that the self which is confidently maintained and used as a means of recognizing, planning and acting... Assumptions such as these are learned and confirmed by the experience of many years" (1971:303).

I thus envisaged from the start that on a personal developmental level this research project would bring about the opportunity to identify new characteristics and strengths. I now recognize that the experience has changed me and helped me grow in important and meaningful ways. New opportunities emerged throughout the process, opening up possibilities that were not present before. Although this research project has left everything changed, I have come out at the other end with a more enlightened and liberal view of the world.

At the start of the research, I also considered the potential dilemma of uncovering information about the Insights Discovery model that made it untenable for me to continue as a facilitator and purveyor of the tool. I have worked with this model for almost 14 years and have, during this time, held it in high regard, been openly enthusiastic about its use, even at one time aspiring to be an employee of the company. It would therefore be a major decision to reject it completely and cut all ties. How would I explain my decision to clients who use the tool and who request workshops in the future? How would I manage the internal embarrassment and humiliation of admitting that I had been 'hoodwinked' by the model's promotional claims for such a long period of time? How could I continue using Insights Discovery if any hint of deception is uncovered? How can I manage the delicate balance between carrying out my job and doing what I believe to be right?

Contact was made with Insights Discovery at the start of the project to inform them of my research and ask if they could tell me about any other similar projects that they were aware of. They were happy to help with this, although not sufficiently interested in my work to contact me again to find out more about my progress and the results. This lack of interest, may in part, be due to lack of contact on my part, however perhaps when this thesis is complete it would be courteous for me to send them a copy. This action may well take the decision of continuing as a facilitator out of my hands completely, as it is quite likely they will take my critique of the model as an insult and feel I am no longer

a suitable ambassador of Insights Discovery. My hope is that this will not be the case but time alone will tell.

### **3.10 Concluding remarks**

At the beginning of this chapter I set out to build a personal framework of concepts, assumptions, expectations, beliefs and theories to guide me through my research. The opportunity to reflection and think deeply about these areas has helped solidify the underpinning theory that supports the research.

The conceptual framework is unquestionably a unique construct which will be viewed differently by every observer. My trains of thought, whilst possibly appearing random and disjointed to some, in my reality follow a meandering pathway of discovery, which has unfolded with each step of the process. Guba argues that "the sets of answers given are in all cases human constructions; that is, they are all inventions of the human mind and hence subject to human error. No construction is or can be incontrovertibly right; advocates of a particular construction must rely on persuasiveness and utility rather than proof in arguing their position" (1994:108).

Whilst there is no right or wrong way of constructing my journey, acknowledging the conceptual framework and appreciating its layers of complexity has enabled me to fully accept and understand my position as a researcher. Undeniably, consciously or unconsciously, the makeup of my conceptual framework has influenced and been influenced by my literature discussion in Chapter 2. The assumptions I have made about what areas I consider important and worthy of further exploration, and therefore my research questions, are inevitably, heavily influenced by my view of the world and my experience.

Chapters 2 and 3 have therefore combined together to allow me to adopt a set of beliefs and position within the literature with which to continue my journey. Now that my philosophical and theoretical stance have been confirmed, I am able to use this

understanding to consider my methodological approach and research design – areas that will be fully explored in Chapter 4.

## 4. Methodology

### 4.1 Introduction

The purpose of this chapter is to examine my research design and justify the choices made, offering an explanation of the process undertaken and the reasons behind it. The methodological approach adopted will be articulated as will the methods – for both collecting and analysing the data - in order to answer the following research questions:

- What are the implications and consequences of using the Insights Discovery tool?
- How can the distinctive power and influence of Insights Discovery be explained?
- How can learning from the delivery of the Insights Discovery tool inform other HRD interventions?

In the previous chapters I have presented a conceptual framework - a personal construction of concepts, assumptions, expectations, beliefs and theories to guide me through my research, and a review of literature considered relevant to my research themes. These underpinning studies, along with reference to the methodologies of other experienced researchers, as Wilson suggests, has given me “a good insight into the strengths and limitations of the various methodologies and methods being used” (2009:59).

Within the unique context of the research, it is advantageous to “carefully consider the conceptual background, including ontological and epistemological perspectives” (Jackson, 2013:49). Construction of the conceptual framework therefore, enables sensible decisions to be made, justifying the methodological approach, which in turn adds credibility to the research (Jackson, 2013). A robust rationale will not only underpin the methodology, but also provide justification for the research process and its outcomes, making “use of various philosophical tools to help clarify the process of inquiry and provide insight into the assumptions on which it conceptually rests” (Kincheloe and Berry, 2004:8).

Once the format of the research has been established and the conceptual framework constructed, the underpinning philosophy for the research is clarified by means of identification of the ontological and epistemological perspectives. Awareness of how the research is philosophically underpinned can “secure the quality of the research produced” (Snape and Spencer, 2003:1). Decisions can then be made about the methodology, as appropriate to the aims and objectives of the study.

It is timely at this point to make clear the distinction between method and methodology - “method and methodology are not the same thing” (Sikes, 2004:15). Methodology is defined as the way in which the research is designed in relation to answering the research questions. Method is the process used to collect and analyse the data in order to obtain evidence to support the research outcomes.

## **4.2 Choosing a methodology**

“Every piece of research, every researcher and every context is, in some way, different and a host of factors contributes to interpretation of phenomena as knowledge is constructed” (Jackson, 2013:50). The process is therefore unique, unreplicable and incomparable. Within these limitations, my role as a researcher is to ensure my methodology stems from a framework that is both robust and defensible, whilst at the same time appreciating that any product of my research will be of my own making and subject to my own assumptions and interpretations. Guba and Lincoln argue that all answers are “human constructions.. and hence subject to human error”... “a particular construction must rely on persuasiveness and utility rather than proof in arguing their position”(Guba and Lincoln, 1994:108).

Pring stresses the important of philosophical underpinning, suggesting that without it “researchers may remain innocently unaware of the deeper meaning and commitments of what they say or how they conduct their research” (2000:89). Wilson and Stutchbury suggest that “philosophical ideas often remain largely hidden”(2009:57) and, as such, research can be “strengthened by a transparent philosophy that underpins the justification of a research methodology” (Jackson, 2013:50).

As each research project is different, in order to choose an appropriate methodology, it is necessary to focus on the unique research questions. “Knowing what you want to find out leads inexorably to the question of how you will get that information” (Miles and Huberman, 1984:42).

Sikes states that an awareness and understanding of “researcher positionality” (2004:17) is an essential step in deciding on a methodology. It is crucial therefore to be clear on my own philosophical assumptions, values and beliefs, as well as ontological and epistemological views. Kincheloe and Berry claim “assumptions shape the outcome of the research and choices made about research methodology profoundly affects what I find” (2004:6). I therefore need to be mindful of the “way the researcher sees and the social location....to focus on the clarification of his or her position in the web of reality” (2004:2). Awareness of my own philosophical assumptions and “researcher positionality” is therefore crucial when making methodological decisions.

### **4.3 Researcher positionality**

As discussed in Chapter 3, ontology is the part of philosophy that studies what it means to exist. “Ontology is the theory of being” (Greener, 2011:9), “a philosophical study of the nature of reality” (Jackson, 2013:52). A researcher must therefore consider and reflect on “issues such as whether the world exists independently of [their].. perceptions of it” (Greener, 2011:6).

The outcomes of these thoughts and reflections form a researcher’s ontological position, which inevitably shapes the methodological approach used in their research. If a researcher has a realist ontology, believing that reality exists independently and externally and can be measured as such, their methodology will be vastly different than a researcher with a subjectivist ontology who understands reality as a socially constructed experience fashioned by the individual. A researcher’s personal stance determines whether a quantitative approach is needed in order to carry out objective

and measurable research, or if a qualitative approach is required for a subjective and interpretative study (Jackson, 2013).

Sikes explains that if the assumption is that knowledge is “real, objective and out there in the world to be captured” (2004,21) a researcher is able to see it, measure it and quantify it. If however knowledge is assumed to be subjective and a matter of interpretation and personal assumption “they will have to ask questions of the people involved” (2004:21). A researcher’s ontological perspective is also therefore “closely related to issues of how we decide to collect our research data...they are intimately linked to the basis upon which we think we know something to be true” (Oliver, 2010:34).

Construction of an ontological framework is helpful in the methodological decision making process and also give credibility to the research outcomes. Choosing a methodology that fits with the ontological framework provides a rationale for the choices made and validates the actions taken and methods used to collect and analyse data (Jackson, 2013).

Chapter 3 follows the construction of my own conceptual framework and concludes that my ontological perspective is subjectivist - my basic assumption is that reality is socially constructed. Realities are apprehendable in the form of multiple, intangible mental constructions, socially and experientially based, local and specific in nature and dependent for their form and content on the individual or group involved in the construction. There is no single reality that can somehow be discovered, but multiple perspectives on the issue. It assumes that different observers may have different viewpoints. “What counts for the truth can vary from place to place and from time to time” (Collins, 1983:88).

The aim of this research was to uncover individual interpretations of an Insights Discovery learning intervention, viewing them through a critical lens, within the boundaries of my conceptual framework. By exploring the interpretations and meanings attributed to the event by stakeholders, the research sought to understand the implications and consequences of using the Insights Discovery model.

In order to answer the research questions, it was necessary to determine my individual interpretations of learning and development interventions which used the psychometric tool, Insights Discovery. My transactional and subjectivist epistemological stance assumed that individual perceptions are a result of unique experiences and that those perceptions are formed unconsciously as we interpret and give meaning to events. A qualitative approach was therefore required to encourage research participants to talk openly about their experiences and an interpretative approach was necessary to analyse the narratives and uncover perceptions and meanings.

A subjectivist ontological perspective was taken in this research, as I view psychometric tools as a “human conceptualisation of the phenomena” (Jackson, 2013:53) we are faced with during our working lives. I regard psychometric tools, not as ‘thing’, an independent entity or something to be ‘done’ to the participant, but as a creative process they enter into, the outcomes determined by how participants relate to the tool and how they make sense and meaning of the experience. From this perspective therefore, psychometric tools are a human construction “created by human beings to make sense of and understand the world, to communicate our understanding and work with what is around us” (Jackson, 2013:53). The Insights Discovery psychometric tool involves individual engagement in an active process whereby learners think, discover, apply, communicate, and critically reflect.

From this subjectivist ontological perspective, the focus of my research was not to investigate the psychometric tool itself or study the participants or their organizations. The research was concerned with the relationship between the participants and Insights Discovery, uncovering individual interpretations of the psychometric tool, the participants and their experiences. Answering the research questions therefore involved exploring the qualitative experience and the interpretations individual participants place on these, in other words, the “internal relationship between the experiencer and the experienced” (Marton and Booth, 1997:113).

Epistemological stance also has an effect on the way in which psychometric tools are administered and perceived by participants. Psychometric tools can be viewed as a body

of knowledge, considered as 'truth' and proved by psychologists as valid and reliable. They are frequently seen as a set of processes and procedures that can be applied to any person and provide an output – “an existing as a body of truth to be taught by instruction and transmission of facts and explanation” (Jackson, 2013:54) - the result or effect of what Law refers to as a “network of heterogeneous materials” (1992:381). Constant repetition and reiteration may give a process, model or tool the appearance of truth or reality that is incontestable and enduring (Gold and Smith, 2003). “Knowledge linked to power, not only assumes the authority of 'the truth' but has the power to make itself true” (Foucault, 1977:27). In this way, psychometric tests can be seen as 'scientific' tools and as a result, achieve commensurate levels of status and power.

Psychometric tools can also be viewed as “reaching an understanding that is created through facilitation, active engagement with hands-on exercises and contextual” (Jackson, 2013:54) discussion so that participants can work through their own sense-making processes.

My personal ontological perspective of psychometric tools is that they are human constructs, created through the relationship between the experiencer and the experience. This view supports a subjective, interpretative epistemological stance where individuals make sense and meaning according to their own unique experiences. This perspective was influential in driving the need to gather data relating to individual interpretations and in considering how the data would be analysed.

#### **4.4 Phenomenological research**

A review of pertinent literature which specifically involved researching methodologies used by other similar studies, provided a strong rationale for a phenomenological methodology – an interpretivist approach which can “describe an aspect of the world as it appears to the individual” (Marton, 1986:33). “The fundamental results of a phenomenological investigation describe how the phenomenon in question is experienced” (Marton and Booth, 1997:122). Some literature views phenomenology as a purely philosophical method which is concerned with the researcher's own

interpretation of a phenomena, whereas phenomenography is the study of individual perceptions about their experiences of a phenomena. However, in much research literature the term phenomenology is widely used to mean the research method that attempts to describe and understand other people's viewpoints.

This is therefore a fitting methodological approach given that the philosophical underpinning for this research is individual experience and their relationship with and interpretation of the psychometric tool. "Experience is constituted between person and world,.. It cannot exist without both of its constituent parts, nor would the constituent parts remain the same were they not parts of the particular relation" (Marton and Booth, 1997:164).

A qualitative methodology is therefore necessary in order to discover how participants perceived and related to the psychometric tool and how they therefore constructed meaning from the event.

A phenomenological approach concentrates on the relationship between the experiencer and the phenomenon (Marton and Booth, 1997) and is appropriate for research when the relationship between the object – in this case the Insights Discovery psychometric tool - and the subject - the individual engaging in the activity - are not considered separate (Marton, 2000). The goal of phenomenological research is to describe a "lived experience [of a phenomenon] committed to the examination of how people make sense of their major life experiences" (Smith et al., 2009:1).

As a researcher, this means; "taking the place of the respondent, trying to see the phenomenon and the situation through her eyes, and living her experience vicariously"(Marton and Booth, 1997:121). Phenomenological methods are particularly effective at bringing to the fore the experiences and perceptions of individuals from their own perspectives, looking beyond the taken-for-granted 'truth', challenging structural or normative assumptions (Lester, 1999). It is generally accepted that perceptions are unique to the individual, may occur instinctively and without conscious recognition, and cannot readily be observed or articulated (Rokeach, 1968). Phenomenology provides a means to enable participants to describe "the relation

between an individual's prior experience and their perceptions of the situation" (Trigwell and Prosser, 2004:410). This allows new understanding of the experience of participants in relation to the phenomenon of the psychometric tool (Marton, 1986).

Epistemologically, phenomenological approaches are based on personal knowledge and subjectivity, and emphasise the importance of individual perspective and interpretation. Gathering data from this paradigm translates into gathering 'rich descriptions' of personal thoughts, experiences and perceptions through inductive, qualitative methods such as interviews, discussions and observation, and representing it from the perspective of the research participants. Phenomenology is viewed as being "particularly appropriate for engaging with complex, controversial or deeply held issues or viewpoints" (Cherry, 2005:62), and a review of the literature reiterates that personality can be an emotive topic. It was expected that feelings associated with this issue may include fear, vulnerability and embarrassment and therefore this approach provided a way to engage with emotive subject matter and allow sensitive exploration to occur. As a methodology, it is a powerful vehicle for understanding subjective experience, gaining insights into people's motivations and actions, and cutting through the clutter of taken-for-granted assumptions and conventional wisdom (Lester, 1999).

Pure phenomenological research seeks to describe rather than explain, and starts from a perspective free from hypotheses or preconceptions (Husserl, 1970), insisting that we must set aside existing understanding of the phenomena and revisit our experience of them in order that new meanings may emerge. Husserl believed current understandings have to be 'bracketed' to the best of our ability to allow phenomena to speak for themselves, unadulterated by our preconceptions. However, more recently, humanist and feminist researchers disprove the possibility of starting without preconceptions or bias, and emphasise instead the importance of clarity when explaining how interpretations and meanings have been placed on findings, as well as making the researcher visible in the 'frame' of the research as an interested and subjective actor rather than a detached and impartial observer (Plummer, 1983, Stanley and Wise, 1993). Adding an interpretive dimension to phenomenological research, allows it to inform, support or challenge current practice. This view was very welcome as I believe it would

be impossible, and indeed detrimental to the research, for me to erase my own experiences, pre-conceptions and assumptions related to the Insights Discovery model.

## **4.5 Method**

Methods are the tools and techniques that are used in the collection and analysis of data. Identification of the most appropriate methodology helps clarify the specific methods to be used. “We should use the methods that are best suited to answering our questions about a phenomenon” (Kincheloe and Berry, 2004:4).

Having outlined the rationale for my research methodology therefore, I can now discuss the practicalities of conducting the research in order to address the research questions:

- What are the implications and consequences of using the Insights Discovery tool?
- How can the distinctive power and influence of Insights Discovery be explained?
- How can learning from the delivery of the Insights Discovery tool inform other HRD interventions?

Just as a rationale for the methodology is required, so the choice of methods also requires justification. “The selection of data sources and the interpretation and analysis of data need to be rigorous in terms of reliability ... and validity ... so that the quality of research is not compromised” (Wilson, 2009:81).

### **4.5.1 Gathering the Data**

Phenomenological approaches can be effectively applied to ‘one off’ case studies, when the commitment is to carry out a detailed examination of the experience of the person and what sense this particular person is making of what is happening to them. It is understandably difficult to form generalisations from single subjects, however group research allows stronger inferences and conclusions to be drawn as factors or issues are

shown to reoccur across participants. It is essential not to assume conclusions that are too generalised. Lester advises researchers to “distinguish between statistical and qualitative validity” and be tentative in suggesting the extent to which their conclusions can be applied to the “population from which the participants or cases were drawn” (Lester, 1999:347).

Patton (2002) emphasises that the capturing part of phenomenological research must be through in-depth interviewing of the people who experienced the phenomenon first hand, i.e. the concept of “lived experiences”.

Phenomenological studies are generally conducted on relatively small sample sizes, the plan being to reveal something about the experience of each of those individuals. “The aim is to find a reasonably homogeneous sample, so that, within the sample, we can examine convergence and divergence in some detail” (Smith et al., 2009:3). Lester raises the issue that in a commercial or organizational setting the phenomenological approach is frequently misunderstood – “it can be hard to get over to people that a single-figure sample is valid - and there can be confusion between methods such as theoretical sampling, used to ensure that participants are drawn from a spread of contexts, and statistical sampling which is concerned with quantitative reliability and often with differences between contexts. If the sample size is increased a common misunderstanding is that the results should be statistically reliable” (1999:3).

My data gathering involved 25 semi-structured interviews and allowed exploration of similarities and differences between each case. Although immediate claims are bounded by the research group studied, generalisation is possible “where the reader is able to assess the evidence in relation to their existing professional and experiential knowledge” (Smith et al., 2009:4).

The research group included:-

- Participants - those who had taken part in Insights Discovery interventions.
- Non-participants - those who worked in organizations where the tool had been used, but had not been personally involved.

- Instigators - those who had commissioned the intervention, involved in decision making and implementation in each organization.

The research group was made up from all levels of the organization, including directors and senior managers. There was however no essential criteria for selecting specific interviewees, other than their agreement to take part. To some degree therefore interviewees self-selected themselves. It was perhaps inevitable that the interviewees that came forward to be interviewed had a story to tell and therefore the majority of the findings refer to interpretations and assumptions of those who had been participants on an Insights Discovery workshop. The participant group therefore had a dominant voice within the research.

The comments of non-participants were also included in the findings, but these were benign in nature, as may have been expected given their limited experience of the tool. The views of instigators were helpful in constructing the Organizational Context data used in Chapter 5. Their comments tended to be positive. Again this was unsurprising given many had invested heavily in the tool.

It is important to stress that the investigation provides only a partial view of the learning intervention in the target organizations and my personal observations and knowledge played an important part in building up a contextual picture. Likewise it was understood from the outset that this research presents only a snapshot of the experience of the interviewees at a certain point in time. Inevitably there were many other possible stories that could have been told, but because of the relatively small sample size, the voices of the majority of programme participants were not directly heard.

I was especially interested in how particular participants within the organizations were able to draw rhetorically upon the resources of talk, thought and action provided by the intervention to persuade others of the benefits of Insights Discovery and so produce a 'virtuous cycle' of Insights Discovery activities. This does not suggest however that all participants responded positively. Indeed, there are a whole variety of responses to the intervention, many of which may run counter to claims of the participants in the study.

A variety of methods can be used in phenomenologically-based research, including interviews, conversations, participant observation, action research, focus meetings and analysis of written or oral self-report, or even art, narratives, or poetry. Language lies at the heart of communication and therefore plays a major role in socially constructing meaning and reality. “Speaking isn’t neutral or passive. Every time we speak, we bring forth a reality. Each time we share words we give legitimacy to the distinctions that those words bring forth” (Freedman and Combs, 1996:29). Understanding is formed from dialectic interplay, the back and forth conversations and communications which help to make sense of the world around us. Research interviews therefore are deemed to be the source of the richest phenomenological data, enabling participants’ perceptions to be fully explored.

Please note that throughout this thesis, where interviewees have been directly quoted, names have been changed to protect their identity.

#### **4.5.2 The interview process**

“An important, and often neglected source of theory is the theories held by the participants in the study.... These theories are important for two reasons. Firstly these theories are real phenomena; they inform the participants’ actions, and any attempt to interpret or explain the participants’ actions without taking account of their actual beliefs, values and theories is probably fruitless (Blumer, 1969; Menzel, 1978). Second, participants have far more experience with things you are studying than you do, and may have important insights into what is going on that you can miss if you don’t take their theories seriously” (Maxwell, 2013:52).

The validity and reliability of the results of phenomenological research are affected by the validity of the data collected during the interviews so for this reason most researchers prefer to conduct interviews personally (Maxwell, 2005, Van Manen, 1990). The interview material was collected over a period of approximately a year and a half. This extended time frame was mainly due to my work commitments, but also, in part, due to the accessibility and availability of the research subjects. These face to face

interviews were conducted personally at a time and place to suit the respondent - either in their own workplace or within my office at the University. This flexible, participant-centred approach served to encourage engagement and minimise disruption in terms of their time and work (Green, 2005:39).

The University of Hull Code of Ethics was followed at all times during the research process and participants were informed at the outset that they were under no obligation to take part – indeed, participation was agreed upon as more of a favour to me than an opportunity to air their views. Confidentiality was assured (Cohen et al., 2000), and the nature and purpose of the research was clarified (McNiff et al., 1996) along with an explanation of how the data would be used (Bell, 1999) before the interviews were conducted. I also contacted Insights Discovery at the outset of my research to inform them of my intentions and to ask if they had knowledge of any previous work that had been carried out which might be helpful. As a result, they kindly sent details of a small number of studies focusing mainly on validity and reliability, project management and sports coaching. Unfortunately these were not relevant to my research but were nonetheless interesting to read.

Each interview undertaken lasted between one and one and a half hours long and permission was sought at the start for the conversation to be recorded on a digital recorder. Although it was recognised that this might present a barrier to some interviewees and may result in their conversation being censored or restrained, (Cohen et al., 2000:281) I considered at the outset that a digital recorder would provide a useful alternative to note taking, and may help the conversation flow naturally and freely at a reasonable pace. I also assumed that the use of the technology would serve to reduce the timings of the interviews which minimised disruption and absence from work for the participants.

The interviews were guided by a loose framework of open-ended questions or ‘prompts’ that provided a basic structure which could also be flexible and responsive enough to allow scope for participants to express their views freely. Polio et al caution that “it is a mistake to assume that questions always function in a the same way or serve the same purpose(s). ...the full meaning of the question emerges only from the engagement of

the researcher with the participant and vice versa” (1997:35). Research is therefore a craft - developed sensitively, thoughtfully and skilfully. There is a fundamental need for flexibility, intuitively shaping the research in response to what is happening in the moment. This organic and responsive approach is considered essential. “If we are driven by method, we may end up shaping our research around methodological obligations and the need to fit “data” to technical requirements, rather than being sensitive to what is going on around us.” (Cunliffe, 2010:667).

Participants were encouraged to consider personal views and beliefs, to explore their ‘embedded, intuitive knowing’ and consider how this impacts on their social reality and the living practices of their organization. Care was taken during the interviews to be as non-directive as possible, whilst at the same time encouraging a full description of their experience, thoughts, feelings, and perceptions (Green, 2005). “The questions, statements and summaries used by the interviewer are designed to evoke descriptions... The most useful questions focus on specific experiences described in a full and detailed manner” (Pollio et al., 1997:30).

The prompts and triggers use typically were as follows:

### **Interviews with participants**

1. Tell me about your job and the kind of things you do.
2. How did you happen to be participant on the Insights Discovery workshop/programme?
3. What were your aims/expectations of attending the workshop/programme – maybe regarding your job and personal expectations?
4. What do you think are the organization’s motives of running the workshop/programme?
5. What do you think did come out of it – personally or organizationally?
6. What were the things that helped or hindered?
7. Is there anything else that you think is relevant that we could discuss?

### **Practitioner Interviews:**

1. How did you become involved with Insights Discovery?
2. How do you think the organization came to use Insights Discovery?
3. What do you think participants get from the programme?
4. What does the organization get out of it?
5. What things do you think help/hinder?
6. Is there anything else that you think is relevant that we could discuss?

This conversational approach utilizing participant's own vernacular with open ended questions, tended to produce interesting and fulsome narratives and it was rarely necessary to prompt beyond the questions above. The discussions were generally free flowing and informal. Silences were also valued in order to give participants thinking time (McNiff et al., 1996), however when further detail was necessary, follow up questions such as "What was that like?" or "How did you feel when that happened?" helped the dialogue progress. Pollio recommends that "'why' questions be avoided when conducting phenomenological interviews as such questions often shift the dialogue away from describing an experience to a more abstract theoretical discussion"(Pollio et al., 1997:30).

When people are engaged with 'an experience' of something major in their lives, they begin to reflect on the significance of what is happening and phenomenological research aims to engage with these reflections (Smith et al., 2009:3). It recognises that access to experience is always dependent on what participants tell us about the experience and that the researcher needs to interpret that account from the participant in order to understand their experiences.

I specifically asked at the start of each interview if participants were happy to have the interview recorded and on a few occasions suggested that the recorder be turned off if it appeared to be hindering discussion of a particularly sensitive theme. It was deemed important "to ensure that the interviewees feel comfortable and that their willingness to co-operate is never abused" (Bowden, 2005:31). Mostly, the recording did not interrupt the discussion, though on several occasions, switching off the recorder at what I thought was the end of the interview, prompted divulgence of an invaluable piece of

information, which had to be captured manually to ensure it was not lost. In the majority of cases it was evident that the interview presented a welcome opportunity for respondents to discuss their thoughts and they were pleased to have their views sought out and paid attention to.

Informal interviews are frequently used by feminist researchers, who seek to interview participants in a way that does not suppress or dominate them. They claim that this method "conveys a deeper feeling for or more emotional closeness to the persons studied" (Jayaratne, 1983:145). Becker (1971) argues conversational interviews are preferable to more traditional formats. Feminists such as Oakley have argued that this is particularly significant when interviewing women, as "use of prescribed interviewing practice is morally indefensible [and] general and irreconcilable contradictions at the heart of the textbook are exposed" (1981:41). Although not the methodological focus of this study, my research did perhaps benefit from my female gender. The fact that I am a woman may have had a positive impact on the outcomes of the interviews, as several studies have found that women receive greater response in an interview situation than men (Hyman et al., 1954, Fowler and Mangione, 1990, Morton-Williams, 1993).

Traditional approaches to research methods have advocated that researchers maintain an emotional distance from the interviewees in order to sustain objectivity and to guard against any researcher influence impacting on the study. However, other writers have argued that developing an empathetic and trusting relationship with the participant can produce data which is richer and more meaningful. (Finch, 1984, Oakley, 1981). Greed similarly sees research as a two-way interaction, and writes "I am studying a world of which I myself am part, with all the emotional involvement and accusations of subjectivity that this creates. I do not attempt to keep my surveyors at arm's length and do research 'on' them as my subjects whilst maintaining a dominant position, as is common in much traditional 'objective' research" (1990:145).

My existing, positive relationship with the research subjects ensured that a good level of rapport and trust was already established and this allowed a depth of discussion that may not have been possible had this not existed. It was of course important for me to

be sensitive and empathetic at all times and surfacing 'deep' issues can be uncomfortable, particularly when taken for-granted assumptions or the status quo are challenged.

#### **4.6 Data analysis**

Interpretivist research operates under the belief that "multiple realities exist because of different individual and group perspectives...[and] no amount of inquiry will converge on one single reality because multiple realities exist and these realities are changing" (Hudson and Ozanne, 1988:509). The goal of research is therefore about understanding human behaviour and the context in which those behaviours occur (Rubinstein, 2013). Therefore interpretivist research does "not readily facilitate the statement of generalizations outside the context of the study, the approach does facilitate generalization within the context or case" (Hudson and Ozanne, 1988:511).

"It can be said that the researcher is engaged in a double hermeneutic because the researcher is trying to make sense of the participant trying to make sense of what is happening to them.." (Smith et al., 2009:3). In other words, "the participants are trying to make sense of their world; the researcher is trying to make sense of the participants trying to make sense of their world" (Smith and Osborn, 2008:53). Lincoln and Guba highlight the complex challenges and responsibilities of the researcher in considering "multiple factors and conditions, all of which interact,... to shape one another ... from the constant inter-play of its shapers, all of which are them-selves part of the action, indistinguishable from it, and shaping and being shaped simultaneously" (1985:242). Researchers must therefore be sensitive to interactions and dialogue; language and discourse being the "means by which humans constitute and order their social realities" (Hatch, 1997a: 276).

The first principle of analysis of phenomenological data is to use an emergent strategy, to allow the method of analysis to follow the nature of the data itself. The issue for researchers however is that phenomenological research generates a large quantity of interview notes and recordings, all of which have to be analysed. Social constructionist

based research is 'messy' and unpredictable, organic in nature, as data does not fall into neat categories and there can be many ways of linking different discussions or observations. This form of research is not about predicting outcomes, rather it is focussed on gathering a body of rich communication which will then be filtered through the experiences, values, beliefs and assumptions of the researcher. The task of trying to make sense of someone else trying to make sense of their experience is very complex and demanded reflexivity and consideration of my own 'taken for granted' assumptions. Smith et al, claim that the researcher's "sense-making is second order; they only have access to the participants' experience through the participants own account of it" (Smith et al., 2009:3).

Stake asserts that "there is no particular moment when data gathering begins" (1995:49). Qualitative data analysis is an intuitive and reflexive process that begins even before the researcher commits to the study. Barnacle (2005) however says that phenomenological rigour, involves approaching the data with no preconceived ideas of themes or categories that it may fit into. This contradicts Stake who claims that "one of the principal qualifications of qualitative researchers is experience" (Stake, 1995:49). As my relationship with Insights Discovery spans approximately 15 years, and much of the data is made up of my own impressions and interpretations, I believe it would be impossible to approach it without any preconceived ideas of issues that may arise. I accept that I did come to the research with my own opinions and thoughts and that these played a large part in the way data was analysed and themes developed.

The "lack of responsiveness of the investigator at all stages of the research process is the greatest hidden threat to validity and one that is poorly detected using post hoc criteria of 'trustworthiness'" (Morse et al., 2002). As such, responsiveness to whether the categorization scheme worked or not, was very important and had the potential to impact irreversibly on the research outcomes. Remaining open minded and using sensitivity, creativity and insight, enabled me to critically evaluate themes as they emerged and where necessary abandon them, regardless of the tempting potential that they initially appeared to offer. These actions were crucial in order to attain maximum reliability and validity.

As my interviews with participants were often weeks and months apart, I had ample opportunity to think carefully about each interview both in isolation and as part of the mass of data. Following the advice of Green (2005) I typed up transcripts immediately after the interviews so that I could check them against my memory and the recordings, and amend any errors. I then read them through in order to question the data critically, considering the contexts, personal interests and agendas that may be taking place. Stake recommends “sensitivity and scepticism” (1995:50) and I scoured the text thoroughly, considering my own assumptions and interpretations.

From the practical academic guidance available on how to extract themes from the data, it would appear that the predominant view is that as long as the data is analysed logically and systematically, (if not using software, post it notes or highlighter pens), suitable themes will emerge. My assumption at the start was that the analysis stage was a set juncture in the process, and that this was the point in time when I would get a feel for what was being said and identify key themes and issues. Upon reflection however I can see that the process of analysis and the formation of themes was in fact happening in the moment of the conversation as the experience of the interviewee became interwoven with my own experience of the model. The interviewer and respondent being jointly involved in knowledge production (Cunliffe, 2009). It was as participants’ interpretations confirmed and challenged my own assumptions that I actually began to make sense and meaning and thereby identify key concepts, not as previously assumed, when I purposefully sat down to ‘analyse the data’.

Although I chose to use a voice recorder during interviews, Stake asserts that it is of little value, “getting the exact words of the respondent is usually not very important, it is what they mean that is important” (1995:66). That said, reading the full transcripts did serve as a reminder, especially given the timescale of the interviewing process, however inevitably the innuendo, subtext and human emotion were somehow lost in the typed word and therefore missing from the page. Stake (1995) suggests forgetting about recordings, in favour of listening, noting down ideas about the meaning of the dialogue and how it might relate to the themes and asking for frequent clarification. This is certainly an idea I will take forward in future research.

In practice, the process of interpreting the data, reading through the transcripts and creating pools of meaning was an evolving, continuous process and not a fixed step on a linear progression route. This is perhaps a risky admission, given that “for many qualitative researchers, there still remains a (real and imagined) stigma attached to the concept of non-linear, fluid research which evolves through the constant re-evaluation and re-negotiation of its boundaries” (Sinkovics and Alfoldi, 2012:822). I am therefore involved in a constant challenge to defend intuitive decision making within a process which is messy and ever changing. Sutton discussed qualitative research as a “closet activity, because our norms about what is considered adequate scholarship are too restrictive” (1997:99). He states that many researchers who are new to academia, feel pressured to hide the way in which they choose their focus, collect data, interpret it, analyse it and formulated findings (Sutton 1997), as they are afraid of criticism from seasoned academics who share differing views. The organic nature of the research makes explanation to a third party a challenge, however I have endeavoured to be as transparent as possible when discussing and justifying my own thought processes and actions.

I found it helpful to note down my thoughts as I went along and constructed and added to a sprawling mind map as ideas emerged. This was a useful exercise and helped to clarify my thoughts and create new insights. In particular, it helped me realise that despite setting out with the aim of having no pre-conceived ideas as to what themes may emerge from the data, this was never even a remote possibility. I can now appreciate that given my embedded and embodied position within the frame of the research, it was inevitable that I did hold pre-existing ideas about possible themes that may emerge, which were fuelled by my own experiences, knowledge and perceptions. These ideas informed and were part of the logical decision making process I went through. I am now resolved to the fact that possible themes existed unconsciously in my head long before I highlighted key phrases and words in the transcripts and put that mind map together, creating categories or “pools of meaning across individuals” (Green, 2005:39). This was a process that happened organically and meant that neither the participants “nor the actual experience, were analysed, perceptions being interpreted from the interview data to form the phenomenographic ‘categories of description’”(Jackson, 2013:60).

I found that this gradual emergence of themes rather than being detrimental, was actually beneficial, in that it prompted me to listen selectively, focusing on particular comments in subsequent interviews, exploring areas I considered might add richness to my research. This self-dialogue allowed me to weigh up my own ideas against the lived experiences of the participants and to flexibly and intuitively shape the research in response to what was happening in the moment. This organic and responsive approach is considered by Cunliffe (2010) to be essential.

Although 25 interviews were conducted in total, there were inevitably some participants who had no notable story to tell. Some comments were nondescript and unremarkable and did not relate to emerging issues and so contributed little to the depth of the study. These conversations were of course never the less important and highlighted the significance of avoiding generalisations when analysing phenomenological data. The diversity of experiences and responses, and my own personal decisions about what to include and not include, resulted in the scale of the project being manageable and not so unwieldy as to cause problems.

The debate over the appropriateness of using computers to analyse data is one which I have carefully considered. Kelle (1997) believes that the 'Frankenstein's monster' effect which alienates the researcher from their data is often overstated (Fielding and Lee, 1991). Gilbert (2002) Hesse-Biber (1996), Seror (2005) however alert researchers to the possible dangers of software encouraging a mechanical approach to interpreting the data. Morison and Moir (1998) discuss the lure of software and believe that it dehumanizes the research process and destroys the personal, intimate aspects of data analysis. Although Sinkovics and Alfoldi feel these dangers may have been exaggerated, they nonetheless recognise the danger of "'tactile-digital divide' or the possibility of a 'coding trap'" (2012:838).

Although my choice not to use analytical software has been challenged by the literature and other seasoned academics, I stand by my decision. "If we are driven by method, we may end up shaping our research around methodological obligations and the need to fit "data" to technical requirements, rather than being sensitive to what is going on around

us.” (Cunliffe, 2010:667). Analytical software is not a ‘golden bullet’ and Bryman and Bell (2003) and Jack and Westwood (2006) warn against the danger of fragmentation and over-simplification’ that destroys the story rather than adding to its plausibility (Golden-Biddle and Locke, 2007) I suggest therefore that ‘old fashioned’ analysis was much more in keeping with the emergent, interpretive nature of this research and thereby assured the integrity of the data was retained in ways software could not.

The formation of relational links between categories inevitably involved judgements based both on the data, and on logical decisions made by me as the researcher (Cunliffe, 2010). Coffey & Atkinson emphasise that “good research is not generated by rigorous data alone ... [but] ‘going beyond’ the data to develop ideas”(1996:139). I believe therefore that my intuition and sensitivity captured and interpreted more accurately the nuances of both language and context, and ensured that the ‘in the moment’ understanding’ was not lost by the intrusion of technology and ‘good coding practice’. This view is confirmed by Wiseman who asserts that “...a serious problem is sometimes created by the very fact of organizing the material through coding or breaking it up into segments in that this destroys the totality of philosophy as expressed by the interviewee--which is closely related to the major goal of the study” (1979:278).

Analysis of the qualitative data and the development of themes, required reflection on the whole research process, the data, the interviews, the context of the organization and my role within this frame. “The whole is always understood to be greater than the sum of its parts, and so the social context of events, thoughts, and actions becomes essential for interpretation” (Schutt, 2006:322). This therefore involved extensive thought and cognitive processes which are, by their very nature, challenging to explain.

The analytical process resulted in the fusion of many thoughts, ideas, assumptions and beliefs. My own interpretation of this complex mix led me to the conclusion that the data fell broadly under three main ‘umbrella’ headings; stereotyping, power and colour. These themes are discussed fully in subsequently chapters.

## 4.7 Validity of phenomenological research

Relevance and rigour are pillars that support the research process. Researchers aim to address real life concerns inherent to human life and open themselves up to critical assessment from peers to ensure clarity and precision, which in turn allow public scrutiny (Pollio et al., 1997). As Morse et al notes: “Without rigor, research is worthless, becomes fiction, and loses its utility”(2002:14).

The validity and reliability of qualitative research compared with quantitative research is widely debated. Edmund Husserl (1859-1938) the philosopher and founder of the phenomenological research method, states that it is as rigorous as any other, and the validity of its results and the reliability of the method to be sound. Smith et al explain it is as “a philosophical approach to the study of experience” (2009:11). They add that phenomenologists may differ in their interests and emphasis and but the main theme remains, that of the meaning of being human, in particular in matters that are uniquely human.

The issue of repeatability can pose a problem for some researchers, as phenomenological research seeks to examine and clarify human experiences as they spontaneously occur in the course of everyday life (von Eckartsberg, 1998). Because of this and as it is frequently loosely structured, phenomenological research may be difficult to replicate. Also, as phenomenological research is often based on small case studies, this can give rise to concerns about generalizability to other situations. As phenomenology is grounded in the lived experience of a phenomena, its validity is created through understanding that experience as it was experienced. Validity, therefore, is understanding the phenomenon from the “accounts of those who have experienced it” and revealing “the 'essence' of an experience” (Jasper, 1994:312).

It is, therefore, not so much concerned with generalizations to larger populations, but with contextual description and analysis. As a result, “the question of generalizability within phenomenology is inappropriate in that the researcher does not intend to produce a theory of general application at the outset. On the contrary, the purpose of phenomenology as a research method is to generate concepts and theories which can

then be tested using other methods” (Jasper, 1994:313). Easterby-Smith et al (2012) also express concern regarding the use of the language of validity and reliability in a phenomenological context, stating that validity and reliability were originally developed for use in quantitative social science and applying these ideas to phenomenological and social constructionist research might imply acceptance of one absolute (positivist) reality.

Other authors take an opposing view, claiming that reliability and validity are and should be relevant to qualitative research. They argue that the introduction of any alternative criteria and parallel terminology undermines rigour and diminishes qualitative research (Morse et al., 2002, Lewis and Ritchie, 2003, Anderson, 2010). Some authors advocate approaches that abolish all criteria because they consider that the quality of qualitative research should be assessed according to the individual conclusions of individual studies (Rolfe, 2006, Miller, 2008, Armour et al., 2009).

As Seamon points out that “the ultimate aim of phenomenological research.. is not idiosyncratic descriptions of the phenomenon.. rather, the aim is to use these descriptions as a ground stone from which to discover underlying commonalities that mark the essential core of the phenomenon” (2000:157). Seamon goes on to argue that, from a phenomenological perspective, reliability cannot be defined as a measurement based on a predefined scale disconnected from the experience and understanding of the researcher. Rather, reliability can only be achieved through what he calls intersubjective corroboration - in other words, can other interested parties find in their own life and experience, either directly or vicariously, what phenomenologists find in their own work? In this sense, the phenomenologist's interpretations are interpretive possibilities rather than repeatable findings.

This debate appears to suggest that, because of the theoretical and methodological diversity of qualitative approaches, a single, universal set of criteria may not be appropriate for all types of research (de Witt and Ploeg, 2006). Guba and Lincoln (1981) replaced reliability and validity with trustworthiness – an overarching term which includes credibility, transferability, dependability, and confirmability. They note that, within the quantitative paradigm, the criteria to achieve rigour are internal validity,

external validity, reliability, and objectivity. These contrast with the qualitative paradigm criteria; credibility, transferability, dependability, and confirmability. They particularly stress the importance of the characteristics of the researcher, who must be responsive and adaptable to changing circumstances, holistic, having professional immediacy, sensitivity, and ability for clarification and summarization.

Van Manen writes that “the method of phenomenology and hermeneutics is that there is no method” (1990:30). My own approach, as defined by the conceptual framework, was to approach the data in a creative and flexible manner. Self-awareness is important to every researcher in order to minimize bias and ensure the validity and reliability of the results. Assessing and making visible the researcher’s position and factors that may affect the results and compromise the data are crucial.

I attempted to fulfil the dual role of trying to make sense of the participant trying to make sense of what is happening to them and “employing the same mental and personal skills and capacities [though more self-consciously and systematically] as the participant, with whom ..[I] share a fundamental property – that of being a human being (Smith et al., 2009:3). Morse et al (2002) claims that research is only as good as the researcher and it is their creativity, sensitivity, flexibility and skill that determines the reliability and validity of the study. Klenke (2008) reports that “instead of being constrained by a single method, qualitative researchers are increasingly encouraged to be flexible and utilize whatever methods necessary to explore phenomenon under consideration”.

This flexible approach contrasted starkly with methods promoting highly structured, step-by-step methods that focused on procedures and techniques as ways to ensure validity. Janesick referred to such approaches as ‘methodolatry’, when the researcher becomes preoccupied with selecting and defending methods to the exclusion of the actual substance of the story being told. Methodolatry describes “a preoccupation with selecting and defending methods to the exclusion of the actual substance of the story being told...the slavish attachment and devotion to method that so often overtakes the discourse” (2003:215).

Whilst it is recognised that prescriptive procedures may help provide a level of confidence and surety to novice researchers, when the goal is to achieve and/or enhance understanding, such methods may serve only to limit or restrict the research (Munhall, 2007).

In phenomenological research, rigour should be addressed in an integrative way using an approach that balances methodological and experiential concerns (Pollio et al., 1997). “Well-executed qualitative procedures that do not generate meaningful results are technique without soul....one needs to be convinced of the evidence serving to ground such findings in lived experience” (Pollio et al., 1997:55) .

The process and the outcome must therefore be addressed in a balanced way. “ ..a phenomenological study must take into consideration methodological congruence (rigorous and appropriate procedures) and experiential concerns that provide insight in terms of plausibility and illumination about a specific phenomenon” (Pereira, 2012:19).

#### **4.8 Reflexivity**

Reflexivity is the process of examining not only oneself as researcher, but also the relationship between researcher and participant. Self-reflexivity involves examining one's ‘conceptual baggage’, assumptions and preconceptions, and how these affect research decisions. Reflection on the relationship between the researcher and the participant, examines how the relationship dynamics affect responses to questions.

Pollner argues that “we need to engage in radical reflexivity, which enjoins the analyst to displace the discourse and practices that ground and constitute his/her endeavours in order to explore the very work of grounding and constituting” (1991:370). In other words, Pollner is asking us to recognize our own situated position and its impact on our research. Cunliffe (2009) suggests that we use radical reflexivity to help us become aware of assumptions and how these play into conversations, interactions and the responses of others, and how they shape meanings and organizational ‘realities’ in every day conversations.

Qualitative researchers are interested in meaning and how those meanings are produced and reproduced in various social cultural and relational contexts. The assumption is that meanings are interactively and socially constructed by individuals located within a social setting, determined by characteristics such as gender, race, class, age. It is inevitable that a researcher has personal views and thoughts on the research phenomena, as well as relationships with the participants. The research interview is an interactive, meaning making event and as such interpretation of the qualitative data requires reflection on the whole research context. Reflexivity involves making the research process itself a focus of inquiry, laying open pre-conceptions and becoming aware of situational dynamics in which the interviewer and respondent are jointly involved in knowledge production (Cunliffe, 2009). It is essential, not just because it requires us to question our ways of relating, acting, managing and organizing, but also because it highlights ethical and moral responsibility for personal and organizational actions.

In this research, my own bias and relationship with participants were undeniable and clearly evident. My assumption from the start was that my multifaceted role as a sales person, consultant, colleague, facilitator and now my reinvention as a researcher would unquestionably affect the process and my interpretation. I believe however that these multiple roles gave my research a depth and richness that could only be achieved by my unique mixture of experience and position.

The shifting balance of power between researcher and research subject are also important to acknowledge in qualitative research and particularly in this study. Participants held power initially in that they were able to decide whether to take part in the study or not and then when they were willing to be interviewed. The power held by me, as the researcher, was a result of the previous relationships and experiences I had had with participants. It is important to acknowledge that I have known many of the participants for various lengths of time and in a range of guises - as a Business Development manager working on behalf of the University, 'selling' learning solutions (including the psychometric tool, Insights Discovery) to their organizations, as a facilitator on the programme itself and on occasion as personal advisor. These roles

have, at times, resulted in partial immersion in the organization, allowing an almost 'ethnographic' experience of the culture and context. This experience gives me a unique perspective in that I have played a role in the learning intervention that I now wish to investigate. It is undeniable that these experiences inform my interpretations and understanding in innumerable and unfathomable ways.

Social construction is based on co-constructed meaning and a social reality that emerges in the moment as people interact. In combination with my previous roles, my reinvention as a researcher may have effected participants' perception of me and will undoubtedly have influenced how they viewed my role in the process, what they perceived my goals to be and therefore how they framed their discussions. Perhaps, for example, they may have assumed that because I delivered the programme, I expected/wanted them to give me positive feedback.

Meaning is created between researcher and participant, therefore just as I have considered participants' perceptions of me, I must also acknowledge my perceptions of them based on past experience and my own natural tendencies. Consideration of the role these things play in constructing dialogue and meaning are an important part of my own reflexivity.

By looking reflexively at my role and unravelling my inner complexities I was able to establish my underlying assumptions, thoughts, beliefs, biases and motivators – all of which acted as filters through which my data passed and therefore dramatically affected the conclusions I made. Erickson recommends having a constant self-dialogue, keeping diaries and extensive records. "I think that it is best to make the research process as reflective as possible" (1973:14). He suggests it would be appropriate to "step back, move to a higher level of abstraction and ask questions which would define more clearly the terms of inquiry" (1973:16) seeking feedback from other researchers and colleagues to clarify concepts and regain insight. This view is collaborated by Marton and Booth, who advise researchers to "step back consciously from their own experience of the phenomenon and use it only to illustrate the ways in which others are talking of it, handling it, experiencing it, and understanding it"(1997:121). The emphasis is on trying to see the intervention through the participants' eyes.

Cunliffe states that “meaning is created through a constant interplay of presence/absence and what is not said is as important as what is said because each supplement the other” (Cunliffe, 2003:987). The meanings I have given to the outputs of my research, are all products of my own assumptions, thoughts, beliefs, biases and motivators. It is inevitable that my own inner filters have homed in on some phrases and ignored others, focussed on certain writers and theories to the exclusion of others, and drawn conclusions from my own perspective. As I consciously illuminate one area of interest, another area falls into the shadows, therefore, “the truth is we cannot be truthful” (2003: 987). My account of this research journey is one in the midst of many other possible accounts. Cunliffe warns that “perhaps the danger lies in not recognizing the situatedness of our position and that it is just one amongst many” (2003: 986). By laying bare my role in this conceptual framework and methodology therefore, I hope to have demonstrated a level of reflexivity, opening my philosophical stance up to “critical questioning so that we expose their situated nature” (2003: 985).

#### **4.9 Concluding remarks**

In this chapter I have developed my theoretical and conceptual framework by further exploring the ontological and epistemological underpinnings of the research. This has allowed me to justify my choice of research design, offering an explanation of the process undertaken and the reasons behind it.

The methodological approach and method have been discussed in the context of collecting and analysing the data in relation to the following research questions:

- What are the implications and consequences of using the Insights Discovery tool?
- How can the distinctive power and influence of Insights Discovery be explained?
- How can learning from the delivery of the Insights Discovery tool inform other HRD interventions?

The chapter considered issues of validity relating to phenomenological research and accepts that the validity of the research is dependent on the individual perceptions of those who seek to evaluate it. Everything written in this thesis is of my own human construction and as Guba and Lincoln state, “the reader cannot be compelled to accept our analyses, or arguments, on the basis of incontestable logic or indisputable evidence; we can only hope to be persuasive and to demonstrate the utility of position” (1994:108).

Finally this chapter reflects on the relationship between the researcher and the participants in a bid to promote personal reflexivity. This allows me to become visible in the ‘frame’ of the research as an interested and subjective actor rather than a detached and impartial observer (Plummer, 1983, Stanley and Wise, 1993), recognizing my own place in the process and my taken for granted suppositions, actions and beliefs.

Chapter 5 now goes on to provide a descriptive account of each of the five organizations involved in the research. This chapter is of great significance, as it captures the context and setting of the people who supplied the data, which is an important part of qualitative research. Appreciation of the bigger picture is vital, as consideration of “the social context of events, thoughts and actions” (Schutt, 2006:322) is necessary for interpretation and meaning making.

## **5. Organizational Context**

### **5.1 Introduction**

The inclusion of this chapter within the main body of the thesis has been a deliberate and calculated decision. Capturing the context and setting of the people who produce the data is an important part of qualitative research. Within this research, the organizational context has proved influential and played an important role in analysing the findings and attempting to draw conclusions. I therefore believe a detailed description of the organizations in which the participants experienced Insights Discovery is an important addition and worthy of a prominent position within the text.

Schutt (2006) asserts that good qualitative researchers are distinguished by their focus on the whole – the setting, group or individual – rather than breaking the whole into separate bits. “The whole is always understood to be greater than the sum of its parts, and so the social context of events, thoughts and actions becomes essential for interpretation”.

The research for this thesis is based on five organizations, Organization A, Organization B, Organization D, Organization C and Organization E, to all of which I have delivered the Insights Discovery psychometric tool. This chapter provides a profile of each of the organizations, using a combination of personal experience and secondary data taken from company websites and publically available material.

The intention of this chapter is to provide a descriptive and arguably functionalist account of each organization. Inevitably, this description is based on a reality constructed from my own thoughts and interpretations, and the meaning I have given to my experiences of working within each business. It is important to mention at this stage that my research has also drawn on personal experiences and conversations with other facilitators and those who have had dealings with the Insights Discovery model

outside of these organizations. This has allowed me to paint a comprehensive picture and create meaning in a more holistic way.

In developing these organizational profiles, I have drawn on material extracted from instigators interviews, participant interviews, informal dialogue between myself and stakeholders, on-line resources and also from personal experiences amassed during my 'immersion' within these specific organizations.

The themes identified with which to produce these accounts are:

- The organization
- Commissioning
- Delivery
- Senior and line management commitment
- Relationship and relevance to business objectives

These themes are considered in order to construct a contextual backdrop, uncovering the organizational milieu and explaining how the intervention was staged in each case. Using these headings enables some useful comparisons to be made and also highlights distinct differences, fore fronting some important issues. In choosing these themes, I have already made personal assumptions that variations in these areas may affect the outcomes of using Insights Discovery and therefore the implications and consequences of its use.

Please note that Organization F was not used as a case study organization because I was not personally involved with the delivery of its Insights Discovery learning intervention. I have no knowledge of the background to the model's use or who instigated it. However I am familiar with the company and the two employees who volunteered to be interviewed as part of the study. They each had unique and relevant experiences of the Insights Discovery model and their thoughts and input have therefore been included in the research data and conclusions.

## **5.2 Organization A**

### **5.2.1 The Organization**

Organization A are a global medical technology business who is the world's largest producer of arthroscopy products, second-largest producer of advanced wound management products, third-largest producer of trauma and clinical therapy products and fourth-largest producer of orthopaedic reconstruction products. Its products are sold in over 90 countries.

The group has a history dating back over 150 years, when the founder opened a small pharmacy in Hull, England in 1856. Organization A has a track record of bringing innovative new products to the market that provide better clinical outcomes for patients and cut costs for healthcare providers. They have almost 11,000 employees and in 2013 annual sales were more than \$4.3 billion.

Hull remains a major cornerstone of Organization A and is the home of the Global Head Office for one of its divisions as well as being a major manufacturing site. It employs 700 staff; however recently there has been concern regarding potential job losses and the latest announcements stated that the workforce would be reducing by up to 140 jobs, resulting in voluntary and compulsory redundancies. The redundancy process was scheduled to begin in the middle of 2015 and the company anticipates the relocation of jobs to be completed by the end of July 2016.

The Hull site has committed to focussing on the manufacture of new products and a £9m investment in the Hull plant will strengthen its supply chain in the event that any major catastrophes happen (In December 2013 the site was flooded by a tidal surge of the River Humber). The company stress that they are bringing new processes to Hull in order to maximise their highly skilled workforce and to continue to create a sustainable future for the site.

My experience was based in the Head Office of one division and the central Learning and Development team. This team is made up of three learning and development consultants who report to the Organizational Development Manager, and who plan and deliver a wide range of courses and customized activities, not only in Hull, but across the UK and globally.

The Learning and Development function is part of a wider Human Resources team with the Organizational Development Manager reporting to the HR Director. The Organizational Development Manager holds her own budget and has autonomy to spend on a programme of activities agreed annually with the HR Director. This centrally held budget funds centrally managed courses. However the team are also able to provide other chargeable activities on request.

Employee and organizational development is high on the agenda at Organization A. There is a prominent humanistic approach to HRD and the company are keen to provide opportunities for staff to develop. With the proviso that they have a good business case; most requests are dealt with favourably. Performance is always at the forefront and the organization has a sophisticated performance management system which feeds into personal development plans and this is supported enthusiastically at a very senior level.

The Learning and Development Team were keen to promote themselves as having an 'organization development' orientation, aligning individual development to organizationally preferred behaviours and outcomes. Their function and their perceptions of it could be characterised as implicitly unitarist with their assumption being that everyone in the organization is a member of a team with a common purpose. The view is that all staff, whether managers or lower-level employees, should share the same objectives and work together harmoniously. Conflicting objectives are seen as negative and dysfunctional. The programmes and activities the team offer therefore have the sole aim of facilitating better organizational performance. HRD work closely with the HR function who have a strong presence at board level and so are able to contribute directly towards the organizational strategy.

At the time of data collection, the Insights Discovery tool was deeply embedded in Organization A's learning and development strategy after having been rolled out globally across the organization for approximately 15 years. The Insights Discovery model is available in 30 different languages, which encourages involvement from participants from a wide range of cultural and social backgrounds. In-house sessions ran at least once a month, sometimes for existing teams that had new members and sometimes for new teams, brought together to complete a specific project etc. The model was included in the sales force induction programme and the majority of Head Office staff had been through the workshop at least once (most teams prefer to repeat the model every 12-18 months).

### **5.2.2 Commissioning**

Within Organization A, this internal workshop was usually requested by line managers – either as part of a team building day or as a standalone event. The aim in most cases was to improve “personal relationships” and build “greater understanding “amongst the team, whilst others had a view that everyone was doing it and they did not want to miss out.

For the HRD Manager interviewed, the Insights Discovery model accounted for a great deal of her work. Discussions alluded to success of the model being important in order to maintaining her professional standing and credibility. It gave her a sense of value, a means to visibly contribute to the organization and also a source of power – she was the only person in the organization able to ‘bestow’ this ‘gift’ that other people wanted.

*“Insights Discovery is a great tool. It has been a huge success, everyone is keen to use it and the feedback is always positive.”*

*[Ann, Insights Discovery Practitioner, Organization A]*

Whilst some of this optimism may be valid, from a critical viewpoint, it may partially be attributable to the ‘Ikea effect’ (Norton et al., 2011) – the tendency for people to place a disproportionately high value on objects that they have partially assembled themselves – regardless of the end result. The object in this case, being the model they have brought into the organization and worked hard to promote. This may also

contribute to the sunk cost effect, whereby organizations continue to devote resources to programmes or projects in which they have invested their time and effort.

Despite the internal delivery mode, the financial amount invested in Insights Discovery by Organization A is unquestionably high. A global roll out for all employees over 15 years is a substantial investment. The cost was minimized however by accredited Organization A staff delivering the workshops internally. It was interesting to note that despite this level of investment, feedback was collected from a functionalist perspective rather than from a critical viewpoint. It seemed that the benefits no longer had to be proved. It had been judged to fit with the interests of the organization and therefore had sufficient momentum to roll forward without question or critique. How easy it would be to call a halt to the use of this model is hard to say. It has become so deeply embedded in this organization that it may be difficult for anyone to speak up against it. Perhaps an example of the “emperor’s dilemma” with people publically supporting a norm that they privately oppose and question (Centola et al., 2005).

### **5.2.3 Delivery**

At Organization A, Insights Discovery interventions were delivered by an accredited practitioner and took the form of a one to one coaching session, stand-alone group workshops or as part of a ‘team day’. These were conducted both on and off site and, depending on the group size, could be facilitated by one or two practitioners.

Cohorts were usually made up of pre-existing teams or newly formed project teams. Generally, participants welcomed the opportunity to be take part in this long established model and attendance and engagement was good. They frequently referred to the intervention as Insights ‘training’ which perhaps alludes to the perceived advantage of going through the model and developing their communication skills.

### **5.2.4 Senior and line management commitment**

The Insights Discovery model was well supported by Organization A senior managers, who were observed to take a functionalist ‘best practice’ approach to all learning and development activities. During the recession and times of budget cuts, Insights

Discovery sessions continued unabated because they were delivered in house and seen to be relatively low cost (the price for production of one individual profile is £65). Participants' departments did not have to bear the cost of the session directly, so it was consequently perceived as good value and no doubt this feature allowed the model to become more deeply embedded in the fabric of the organization than it otherwise might have been.

The model was ubiquitous within the organization and was particularly visible in the office environment in a number of significant and symbolic ways. Those who had attended workshops or one-to-one coaching had the Insights 'colour bricks' on their desk, many disclosed their colour preferences on their personal intranet page and on the bottom of emails, and other displayed team colour wheels on the office walls.

The programme was perceived to be at least partially connected to 'belongingness' - being a part of both the team and organization. There were also messages of diversity - that we [Organization A] need a mixture of all different types of people to be successful. This mirrored and reinforced the 'diversity is best' narrative, but as my findings discuss later, this was not necessarily borne out by the participant's experience. Nevertheless, at least at the level of rhetoric, the programme was linked to improved team work, valuing diversity and consideration of other people's perspectives.

#### **5.2.5 Relationship and relevance to business objectives**

Undoubtedly the widespread use of this model and financial investment was encouraged by its fit with the organization's competency framework and its close association with the Organization A's Vision and Values, and Brand Personalities:

"Values:

PERFORMANCE: being responsive to customer needs, setting clear goals and standards and achieving them, delivering quality and value and driving for continuous improvement.

INNOVATION: always seeking to improve, forward looking, anticipating customers' needs, overcoming barriers and developing opportunities, encouraging and supporting new ideas.

TRUST: building and encouraging close relationships with customers, colleagues and communities, listening to, understanding and respecting people's needs, being straightforward and doing what we say.

Brand Personalities:

Personable: friendly, approachable, caring, builds relationships, collaborative

Energetic: enthusiastic, makes things happen, values fresh ideas

Responsive: purposeful, fast, flexible, gets it done, clear and simple

Confident: expert, experienced, authoritative, thorough, dependable

Honest: genuine, straightforward, open, ethical, trusted"

*(Organization A, 2014)*

The importance of these values and behaviours are widely understood amongst employees and this perception is shared across the different groups of stakeholders. The Values and Brand Personalities are displayed right across the organization, on posters, display boards, screen savers etc. There was a strong sense that the Insights Discovery model had a direct relevance for how staff could better understand each other and perform more effectively.

Organization A's aspiration to be perceived as a 'learning organization' was to a great extent achieved in relation to the Insights Discovery programme. The existence of the programme per se reinforced the attitude that people felt proud to work for a progressive and forward thinking organization who valued self-development and team building. This was particularly so when contrasted with other organizations who did nothing that was not specifically output related.

*"It was good to spend the afternoon with members of my team and get to know them a bit better. Organization A is good for that – they're not afraid to spend money taking you out of work so you can spend time getting to know yourself a bit better. They're very forward thinking in that respect."*

*[Mark, Participant, Organization A]*

## 5.3 Organization B

### 5.3.1 The Organization

Organization B dates back to 1876 and is a business based in Hull employing 300 local people. It promotes itself as a business “bursting with passionate, enthusiastic people with a bias for action” (Organization B, 2014a).

They support 500 local businesses – claiming to turn every £1 into £3 for the local economy, investing £500m in health, education and community facilities, providing employability skills and experiences for over 1000 young people and investing £500,000 in community projects.

Organization B has a three tier Foundation, as illustrated below:

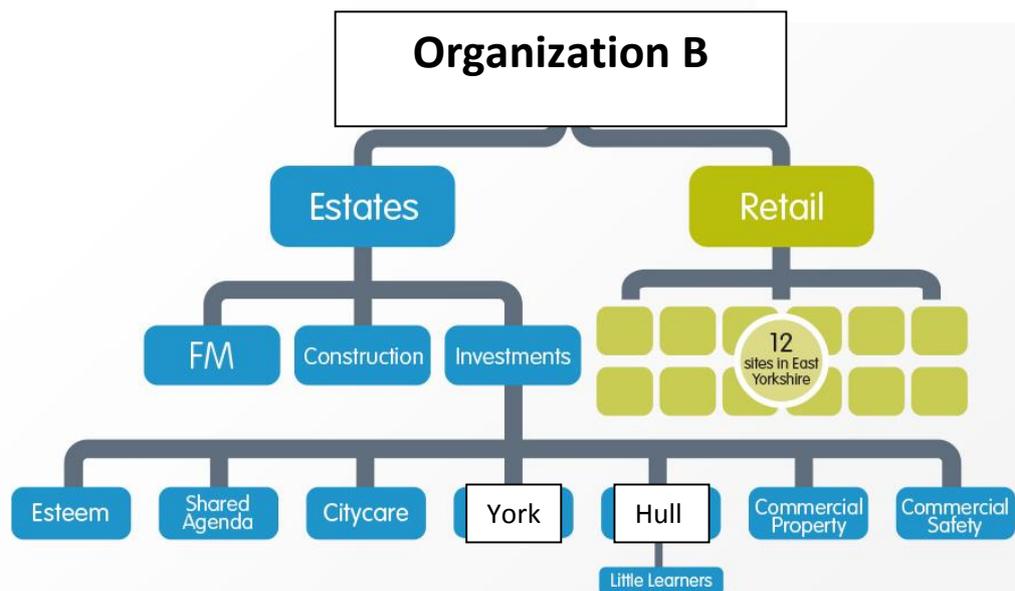


Figure 1: Organization B organizational structure

The organizational structure is made up of two branches. The Estates Division which provides a full range of services, ranging from large scale project development and delivery, to hard and soft facilities management and legal compliance services and the Retail Division ‘On the Go’ which serves over four million customers every year from twelve fuel and convenience stores across the region.

The construction group have delivered projects worth £200m in Hull and have helped change the face of healthcare and education through the delivery of its Building Schools for the Future and NHS Local Improvement Finance Trust (Lift) programmes. It has overseen the construction of 12 new healthcare centres and 22 educational developments since 2008.

Organization B strives to be a world class company, to be the best at what they do, and they are proud to be recognised as a 'Sunday Times Top 10 Best Company to Work For' business, following their core philosophy of "a great place to work and a great company to deal with" (Organization B, 2014a), with customers and communities at its heart. They are similarly proud of their Investors in People (IiP) award.

Employee and organizational development is high on the agenda at Organization B and their humanistic approach to HRD is apparent in their website claims that they want "an incredible mix of talented individuals who make it their job to go that extra mile" and in return, they promise to "care for you, support you and encourage you to reach your full potential" (Organization B, 2014a).

They stress that they are keen to invest resources to effectively engage staff and to listen to customers, using a series of platforms and techniques. "The firm has implemented new initiatives, demonstrating its genuine belief in the value of employee engagement". Their dedication to employee development is highlighted on the website, the..

"ongoing cycle of learning and improvement will unlock opportunities, unleash our people and ensure we continue to move closer towards Organization B's vision to be a great place to work, a great company to deal with....We get lots of good, qualified, talented people who want to work for Organization B – but the ones who are nice and like people tend to succeed" (Organization B, 2014a).

The emphasis on success was confirmed by a recent study performed by Professor Terry Williams, Dean of Hull University Business School, who found that Organization B had delivered 'construction project excellence'. Professor Williams concluded;

"This achievement of success across a whole range of criteria naturally comes from a multi-faceted set of causes, which combine together in many ways. There

are a number of factors at the root of this, but key is the organizational culture, and also the sense of locality of the company, the use of 'learning teams' and the adoption of the 'single team' approach" (Organization B, 2014b).

Organization B's Managing Director said of the £100m estates company;

"These long standing programmes enabled us to continually learn and develop, and to invest in our people, systems and processes. It allowed us to not only develop our construction division, but to grow our facilities management and commercial safety businesses, leading to a more holistic estates offer for our customers." (Organization B, 2014a).

### **5.3.2 Commissioning**

The company have a small HR team consisting of one Head of People and Brand and an HR Assistant. Both are new to working in an HR role and are relatively inexperienced. They oversee and organise training and development activities including the Leadership Challenge programme which takes employees from around the business and puts them through intensive management and leadership training. The team's role in this is purely administrative however and HRD interventions appear to be instigated and driven by the directors. Organization B is a Corporate Partner of the Business School and as such has a presence on various committees. It was as a result of a conversation with the Finance Director during one of these meetings that the Insights Discovery sessions were organised.

The Finance Director initially approached me regarding running Insights Discovery sessions in 2011 because he believed it would be a good way to engage staff and 'to improve team work and communication'. I conducted a 1:1 coaching session for him and have since gone on to deliver the tool to 110 staff members from both the Estates and the Retail Division. This has included running a session specifically for the Board of Directors and also for the Leadership Challenge group.

The financial investment in Insights Discovery to date has amounted to approximately £30k. It is interesting to note that no formal evaluation has ever been performed and it

appears that success was judged on rhetoric alone with no more substantial benefits having to be proved. Again, the tool had been judged to fit with the interests of the organization and therefore had sufficient momentum to roll forward without question or critique.

*“.. it’s doing its job. The staff love it and we are learning more about each other and what makes us tick”*

*[Stephen, Finance Director and Commissioner, Organization B]*

As the instigator of the programme, these positive comments may be expected. The individuals who commission the model are understandably keen to promote and sell the benefits within their organization.

### **5.2.3 Delivery**

At Organization B, interventions were personally delivered by me, in my role as accredited practitioner. Sessions took the form of one to one coaching sessions, stand-alone group workshops or as part of a ‘team day’. These were conducted both on and off site – at the company’s training facility or at the Business School. Cohorts were generally made up of employees from different parts of the business who did know each other.

Participants had a positive attitude to the workshop and attendance and engagement was good. Although the model broke training convention in Organization B and was unlike any intervention that participants had taken part in before, they appeared to be at ease and keen to take part. This may have been attributable to the workshops structure and timeframe, which fitted with a training pattern they had become familiar with. The short, stand-alone workshop set participants expectations that the model was another form of ‘training’ and therefore would be of benefit to them and the organization.

### **5.2.4 Senior and line management commitment**

The Insights Discovery model was well supported by Organization B’s Board of Directors and senior managers. Most were keen to get involved, requesting specific sessions for

their teams and even on one occasion for a Director's wife as a Christmas present! The workshops ran from 2011 to 2013, a testing period when many other companies were cutting back on training and development budgets. The sessions continued to run, despite the fact they were delivered by an external provider. We can therefore assume that they were perceived as adding value even during times of austerity.

The visibility of the Directors and senior management in relation to the model and the dialogue linking it to organizational behaviours and values reinforces the commitment from line managers and individuals. Their involvement and presence at workshops and visible displays in the office were symbolically significant as well as being an important enabler to ensure the model made the transition from workshop to workplace.

Insights Discovery is firmly embedded within Organization B and visible evidence such as self-made posters showing a picture of the person and their colour energy traits appear on office doors. Team colour wheels are displayed on the walls and Insights Discovery 'language' is frequently used in every day conversation. Profiles are collectively stored on a shared drive, available for all to read. Action plans completed at the end of the workshops feed into Performance Review objectives. The programme is perceived to be connected to 'belongingness' - being a part of both the team and organization. Participants were keen to be take part in these sessions, with those who had not, expressing feelings of being 'left out of the Insights club'. The model was promoted as a means to improve team work, value diversity and appreciate differing perspectives and at least on a rhetorical level, it appeared to achieve its objectives.

#### **5.2.5 Relationship and relevance to business objectives**

It is clear that Organization B takes their accreditations very seriously. Their Sunday Times Top 10 Best Company to Work For' and 'Investors in People' awards are highly prized and promoted widely.

The Finance Director believes in developing employees and therefore viewed this model as a 'good thing' which could at the same time contribute towards the company accreditations. The programme was also considered to be highly relevant to business

objectives through its close association with Organization B's 'family' approach and behaviours.

"Organization B is a 'family', recognising that a company's biggest asset is its people, as people ultimately deliver the products and services that delight our customers.

We have expected and required behaviours rather than values, for in the end it is how people behave toward each other that counts.

Staff have nurtured a special culture of care and respect for each other and the businesses and communities they work with, built around the cornerstones of:

Being positive...

In our search for excellence we focus our positive energy into performance. With a cup half full, we aim to be the best.

Being professional...

We always deliver our obligations and promises to the highest standards.

Being customer focused...

We put our customers first, for delighted customers means the opportunity of long term partnerships.

Being team players...

A single team approach leads to a successful outcome. We look out for each other, support each other, and challenge each other.

Doing the right thing...

We always do the right thing by our people, our customers, the communities we serve and the environment."

(Organization B, 2014a)

The importance of these values and behaviours are widely recognised amongst employees and they are displayed physically around the organization and on the company webpage. There was a strong sense that the Insights Discovery model had a direct relevance for how staff could better work together and perform more effectively.

Organization B overtly displays a humanistic ideology, offering to care for and support employees to reach their full potential. The Insights Discovery model contributes to this

aspiration, as the existence and availability of the programme reinforces the attitude that this is a dynamic and cutting-edge organization who value its employees and their self-development. Participants appeared to 'buy in' to this ideology and do not question the motives of management in instigating the workshop.

*"I really enjoyed the session and it was especially good to get my own profile. I couldn't believe it – it was so much like me. It was great to find out more about other people I'd been working with too. I could really understand why I found some people easy to get on with and some people impossible... I suppose the company's motive is that they want us to get on better with each other. I think it's good that Organization B give us opportunities like that."*

*[Mary, Participant, Organization B]*

## **5.4 Organization C**

### **5.4.1 The Organization**

Organization C was established in 1851 and is a sixth-generation family business based in Hull. For many years its key strength lay in bakery and retailing, but following a corporate review in 2004 the decision was taken to sell its chain of 114 stores in Yorkshire and the North Midlands. The group is now a supplier rather than a retailer, operating four principal businesses:

- *Business 1* is one of the fastest growing food brands in the UK. As well as its famous Yorkshire puddings and roast potatoes, the range also includes a growing selection of family favourites, from traditional stuffing and dumplings, to seasonal vegetables and nostalgic desserts.
- *Business 2* is the leading UK sandwich bread producer, baking more than one million loaves each week. It is also the home of Yorkshire's Champion Bread, bloomers, farmhouse loaves, cobs and rolls, all baked in Hull using flour milled in Yorkshire from wheat grown in Yorkshire.
- *Business 3* are specialists in freshly prepared vegetables and salad and source ingredients through the Spanish business, Organization C Europe, when they are not available in the UK.

- *Business 4* was established 25 years ago and since then has built a reputation for supplying high quality organic vegetable boxes with fantastic levels of service. It now delivers a range of groceries, all locally sourced wherever possible, to tens of thousands of homes across the country every week.

The company is strongly committed to the Hull area, and embraces the concept of corporate social responsibility, sponsoring a number of community initiatives. Perhaps unusually for the current era, a good number of its senior managers have stayed with the company for many years.

Organization C promote their ethos as being

“very true to our family values and people are unquestionably at the heart of everything we do. We look after our own people. We respect them and appreciate their role in our success....We strive daily to live up to our ambition of being ‘a business to be proud of’ and this helps guide what we do and how we do it” (Organization C, 2014).

The organization claims to look after people well - respect them, reward commitment and loyalty, encourage talent, recognizing achievements and ultimately appreciating their role in the company’s success.

The company are keen to be seen as developmental, stating on their website that

“Everyone is given the opportunity to learn new skills and polish up their old ones through a number of in-house training programmes, some of which include input from Hull University Business School.” (Organization C, 2014)

Senior staff also have the opportunity to study the Advanced Management Programme at Harvard Business School in the US.

“We take recruitment very seriously as we recognise that talent and commitment of our colleagues plays a really large part in our success as a business.

We choose colleagues because they're a good fit for our business and passionately share our values, and sometimes more importance is placed on these qualities than experience" (Organization C, 2014).

Despite these strong claims, their approach to HRD has behaviourist traits. The programme is more about improving performance than individual learning. 'Identifying talent' is also a prominent theme and there is a sense that participants are being closely monitored throughout to see how they perform and if they 'fit'.

At the time of instigation, Organization C had a small HR team consisting of an HR Director and HR Manager and three HR assistants, who also oversaw training and development activities. The structure and approach of Organization C is paternalistic and the Managing Director acts as the 'protector' of the family fortune. He has an army background and a directive, coercive management style, controversially preferring to bring in ex-army colleagues, including a new HR Director (who has no formal HR qualification) rather than promote internally or bring in professionals. The retirement of the previous HR Director had the potential to cause instability in the programme; however the lack of disruption is perhaps indicative of wider commitment to the programme and its 'embeddedness' within the organization. Whilst the new Director does not have the passion for HRD of his predecessor, and is perhaps less sympathetic to the programme's goals and history, momentum is maintained by the Managing Director.

The Managing Director opens every programme with talk of 'keeping the family' happy so they continue to invest in the business and the importance of satisfying shareholders to keep the business alive. People are the means to achieving profit and learning is a way to achieve better performance. This programme is not therefore about self-actualization but about learning to work better and achieve more.

The unitarist values seem to be accepted and even appreciated by workers, many of whom have worked for the group for several years and may have different generations of the same family working within the business.

#### **5.4.2 Commissioning**

This programme was instigated during a period when the Business School was actively engaging with external clients. Organization C are now Corporate Partners of the School and engage with us in a variety of guest lectures, student placements etc.

In 2007, Organization C identified the need for senior managers with the potential for advancement to board level to undertake personal development training and to be exposed to management disciplines outside their individual area. The candidates were seen as highly competent managers, typically, though not exclusively, in the 30-45 age group. Mostly they were functional specialists in a single discipline, and all were considered to have development potential, some being seen as contenders for future Divisional Board appointments. All had substantial management experience in their various divisions and with previous employers, but the majority had received no recent formal training.

The non-accredited management development programme that resulted was instigated by the then HR Director in 2007 and has continued to run every January since. The two week intensive programme has the objectives of developing greater awareness of the wider business and to 'up skill' managers to face contemporary challenges. All participants are required to 'stay over' at an Organization C owned hotel, even those who live locally. This has several purposes; to encourage participants to bond as group, to give them 'thinking space' away from the office, to allow evening work and to reward them for being 'special' employees - 'the chosen ones'.

Week one concentrates on personal awareness and introduction to new business disciplines, whilst week two focuses on marketing and strategy. The formal University day time sessions make way for nightly evening activities at the hotel – some work related and some social.

The programme culminates in a presentation to Organization C Directors. The schedule is designed to be full and demanding with participants 'living and breathing' the business for two full weeks. The only escape is when participants are allowed to go home for the weekend.

My experience with Organization C is as deliverer of an Insights Discovery workshop as part of their yearly management development programme and I have now worked with approximately 80 employees across all Organization C businesses.

#### **5.4.3 Delivery**

I deliver these 3 hour workshops at the Business School in my role as accredited practitioner. The sessions take place on the first afternoon of a gruelling two week programme and provide a good opportunity for participants to get to know each other in a relaxed and informal way. Delivered as part of a larger programme, investment in the Insights Discovery tool itself is less obvious and success is judged by immediate evaluation of the programme as a whole and by the repeat business. Comments on the Insights Discovery workshop are generally favourable and as such the sessions roll forward every year without undue consideration and critique.

Cohorts were made up of two people from each of the different businesses and generally they do not know each other before embarking on the programme.

Organization C's HR policies and processes are well integrated within the organization and their performance management system is used effectively to inform decisions. Individuals are highlighted as having potential through this process and names are put forward to the HR team. The HR team then decide on who will be invited. Competition to take part is strong and as only 10 participants attend per year, there is always a waiting list. In most cases participants welcomed the opportunity to be involved in this 'talent' programme, and attendance and engagement is good.

#### **5.4.4 Senior and line management commitment**

The Management Development programme is supported by Organization C Directors and senior managers. They are keen to be involved in the programme as a whole and the interest in the Insights Discovery tool appears to have developed with the building of a critical mass of participants. Again as in previous cases, this programme has

continued to run throughout the recession period, which appears to affirm that the organizational consider it adds value and provides a meaningful return on investment.

From a business point of view the programme is seen as a way to test out 'managers', assess their potential for board level positions and see if they are a "good fit for our business". It also serves to facilitate the development of a common corporate culture across all businesses. Participants appear to be generally excited about coming on the programme, worried about being out of the office for two weeks and understandably concerned that the organizational spotlight may mark them out as failures or 'not good enough'. There is a real sense that their performance on the programme could make or break their careers. The stress of constant scrutiny is compounded by the intensive regime and the residential element, with events and work activities extending late into the evening on most nights.

Commitment is particularly evidenced by top level engagement with the programme. The Managing Director attends to welcome the group on day one and other directors and senior managers contribute to the delivery of the programme and attend events during the two weeks. The final presentations and award giving event are also well attended and the presence of directors and senior managers contributes to the perception that this is a high profile event, offering participants an opportunity to raise their profiles and be noticed.

Participants view this event as a prestigious programme, accessible to only the select few, and selection marks them out as 'high flyers' to the rest of the organization. This reiterates that the programme is a significant management development intervention and participants feel an enormous amount of satisfaction as they receive valuable recognition and feedback for their work during the intense two weeks.

Regarding Insights Discovery specifically, although it has not been adopted in an overt manner by the organization, rhetoric suggests staff have become consciously aware of it, whether they have attended the programme or not. My research also indicates it has become a means of assessment in itself, used in order to determine participants 'fit' with the business and specific roles.

#### 5.4.5 Relationship and relevance to business objectives

At the time of instigation, the HR Director appeared to subscribe to the belief that management development is ultimately good for the organization. This programme appeared to be a bid to achieve good practice rather than a means to support the organizational strategy. This is a paradox recognised by Mabey and Finch-Lees, quoting Tamkin and Hillage 1998, who state that investment in management development is “more an act of faith” than a calculated solution (2008:93).

*“The group were trying to become more sophisticated in their approach to training. It was felt at the time that management development was something we should be doing. Being honest, I would say that business objectives didn’t feature very highly on our list of reasons to go ahead. It was a risk, a big investment with no assurance of positive outcomes, but we believed it would make things better.”*

*[Patricia, HR Manager, Organization C]*

The programme is now considered to be highly relevant to Organization C’s business objectives through its close association with the ‘family values’.

Consideration - We are a family business and consider those around us – our colleagues, customers, suppliers and local communities – as part of the family. A community should be a better place for having one of our businesses in it and we make sure this is the case.

People - We look after our people well. We respect them and appreciate their role in our success. We’re keen to attract and develop brilliant individuals who share our passion, our pride and our values. We enjoy seeing colleagues succeed and encourage them to be the best they can be by motivating them and giving them the best possible training.

Integrity - We are ethical and trustworthy. We take pride in knowing everyone in our supply chain, right the way back to the farmer. We value our reputation for supplying fantastic trusted food, and make our decisions wisely as whatever we do today will impact on tomorrow. We don’t define rights and wrongs, but have a saying “No sharp practice – you will know it when you see it”.

Boldness - Our business is built on boldness. We've had to be bold to survive the challenges of the past 162 years. We will continue to be bold in making our decisions and executing our strategies to ensure we survive for another 160 years and more.

Openness - Trusted long-standing relationships are as important to us today as they were to our founder six generations ago. We believe great relationships are secured by being honest, open and transparent, with no sharp practice.

Commitment - With more than 160 years behind us, there's no doubt that we're in it for the long-term. But in addition to having a business to be proud of today, we must demonstrate the perseverance to ensure we have a future to be proud of and as the custodians of this very special business this is something we are all very committed to."

(Organization C, 2014)

These values are promoted by Organization C as being core to the business and integrated into work practices and displayed visually for all to see. The Insights Discovery model appears to align with their humanistic discourse and contributes to their claim that

"we are especially keen on developing individuals and helping them achieve their goals and be the best they can be. We have numerous training schemes in place – whether in-house or external with the likes of Hull University Business School or Harvard Business School in the US" (Organization C, 2014).

## **5.5 Organization D**

### **5.5.1 The Organization**

Organization D was previously an NHS Hull provider of services, and officially formed in June 2010 as an independent health services provider separate to the commissioning organization, NHS Hull.

Organization D is now the 13th largest social enterprise in the country, an independent "for better profit" co-owned business, working as part of the NHS family in a similar way to GPs, Dentists and Pharmacies. They employ approximately 1500 people and provide community health and integrated social care services to over a half a million local people in Hull, the East Riding of Yorkshire and Knowsley, Merseyside.

Organization D is an employee owned organization, with all permanent staff having the opportunity to purchase a £1 share. This business model aims to give staff a sense of belonging, accountability and the right to have a say about the running of the organization along with future plans and opportunities. It promotes itself as a socially motivated company, with a diverse portfolio of businesses and a registered charity, allowing it to invest into services, staff and the communities in which they work. A recent Social Return on Investment audit showed a return of £33 for every £1 spent.

Organization D services aim to help minimise the need for acute care in hospital through early interventions, community-based treatment and promotion of healthy lifestyles. They provide over 75 diverse services in community settings, including End of Life, District Nursing, TB Clinics, Community Paediatric Nursing, Health Visitors, School Nurses, Sexual Health, Dentistry, Public Health, Prison Health, GP Practices, Minor Injury Units, Eating Disorders and Psychological Wellbeing to name but a few. They also run City Health Pharmacy Ltd, a retail and wholesale pharmacy business and Tangerine Discretionary PCC Ltd, a contingency and risk business. Their charity Organization D Foundation allows them to give extra support to the communities they work in.

The Chief Executive of Organization D declares a strong, humanistic approach to HRD, believing that the business is people driven and that learning, skill development and self actualization will incentivise and motivate employees. The humanistic approach distinguishes itself from other approaches in several ways, including an emphasis on subjective meaning, a rejection of determinism, and a concern for positive self growth. "If humans are not viewed as motivated to develop and improve, then some of the core premises of HRD disappears" (Swanson and Holton, 2001:155).

These concepts are filtering down through the organization and there is a feeling that this company represents a new and exciting future for healthcare in the city. The transition from NHS to social enterprise has posed many complex challenges, not least the change in staff mentality and expectations. This programme represents one way in which Organization D are attempting to break down barriers and redefine traditional NHS structures and processes. Other initiatives include banning all eating at desks in their new headquarters so that staff are encouraged to go down to the canteen area and integrate with the directors, managers and colleagues in a relaxed and informal setting.

### **5.5.2 Commissioning**

This programme was instigated during a period when the Business School was actively engaging with external clients to build up local relationships and procure business. Organization D are now Corporate Partners of the School and continue to engage with us in a variety of ways - guest lectures, student placements etc.

In 2010 when Organization D formed, we were approached by their Chief Executive and Organizational Development Manager to run an accredited Management Development Programme. This was initially aimed at the Senior Team of Directors to focus on the issues faced by Organization D, its strategy and future aspirations.

The management development programme that resulted is accredited with 40 credits at Level 7 and has now been delivered to 5 cohorts - approximately 100 participants. The overall ethos of the programme is to engage the participants in critical reflection and development so as to increase their capability to operate proactively and at a strategic level within the organization. The programme focuses on:

- Personal performance, style and future goals
- Understanding the strategic organizational context and challenges
- Implementation of strategic change
- The legal framework of healthcare delivery
- Strategic marketing
- Corporate finance

It is structured around four 2 day workshops.

1. Management and Personal Development – which includes an Insights Discovery workshop.
2. Strategic Development in Health Management
3. Change and Engagement in a Health Management Context
4. Managing Performance and Resources – which includes corporate finance

The modules run at 6 week intervals, which allow participants to complete a formal assignment in between. Participants are also expected to complete a 'live change intervention' or group improvement project which culminates in presentations to Senior Managers and Directors at the end of the programme.

### **5.5.3 Delivery**

The Management and Personal Development module is delivered by me at the Business School, and the Insights Discovery workshop forms part of this. Investment in the programme is therefore considered holistically and Insights Discovery is viewed as a part of the programme rather than a standalone tool. Its merits are evaluated along with the module as a whole and judged by positive discourse following the module, comments on 'happy sheets' and ultimately by the repeat business.

With the exception of the Director cohort, participants are generally from diverse areas of the business and do not know each other before the start of the programme. Individuals have very different educational backgrounds, some with higher education qualifications and some who have no experience of studying since attending school.

Promotion of the programme appears to be good and there is generally a waiting list of people who have either requested to attend the programme or have been recommended by their managers via the Performance Management review process. The sense of competition to secure a place has resulted in some being noticeably excited about the opportunity. A small proportion however has felt pressured to attend and their resentment is vocalised during the modules and in the assignments.

Attendance and engagement has varied between cohorts with some participants not attending, dropping out, not completing assignments on time or at all etc. The internal management and promotion of the programme in Organization D may have impacted on this, and issues were particularly noticeable when the Organizational Development Lead changed roles and lessons learned from previous cohorts were lost. These include the management of expectations and the important of sending out a clear message when participants enrol that attendance is mandatory, and assignments must be completed and submitted on time etc.

#### **5.5.4 Senior and line management commitment**

The Organization D Management Development programme is strongly supported by the Chief Executives and Directors. The Directors were participants on the first programme and they continue to be involved, sponsoring projects and putting forward participants to attend future programmes.

Commitment is particularly evidenced by engagement with the group projects. This is perhaps not surprising as the projects represent tangible output – an improvement idea that can contribute to the success of the organization by improving performance and offering a return on investment. The final presentations and award giving celebration event are well attended, generally by the Chief Executive, directors and line managers. Their presence contributes to the feeling that this is a high profile event that offers participants an opportunity to raise their profiles and voice their opinions. This reiterates that the programme is not simply an accredited University programme but a significant management development intervention. Recommendations are taken seriously and participants are frequently asked to support the implementation of their ideas going forward. Participants feel an enormous amount of pride and satisfaction as they see their project work translated into new working practices and this serves to validate their effort and work on the programme.

As with the previous cases, this programme has continued to run throughout the recession period, retaining a strong focus on development. Organization D is proud of its Investors in People Silver status, and its commitment to employees is echoed in its apparent enthusiasm for this intervention.

It should be noted that commitment to the programme cannot be equated to commitment to the Insights Discovery model and my impression is that whilst the model has been meaningful to some individuals, in general it is seen as just another model used on the programme and has not been adopted or promoted to any degree by the organization as a whole.

#### **5.5.5 Relationship and relevance to business objectives**

It is evident that a paradox exists in Organization D's HRD discourse. On one hand the Chief Executive promotes a humanistic approach, speaking of his belief that the business is people driven and that learning, skill development and self actualization will incentivise and motivate employees. At the same time however, the drivers for this management development programme are manifestly about the strategic implications of the transition from NHS to independent health services provider. At its core, is the desire for 'improved' managers, who are more responsive to change and doing things differently. The focus is less on the development of individual manager's skills and more on the collective development of management and the improvement of management processes in order to achieve Organization D's future aspirations.

Organization D states that their basic principles are all about people - caring for people, inside and outside the organization. The Management Development programme is therefore considered to be extremely relevant to business objectives through its focus on people, strategy and future aspirations.

The programme is aligned with Organization D's mission statement and values which are:

“To grow a socially responsible commercial business that contributes to the wider wellbeing of the communities in which we provide services, from which the high quality and safe services delivered are personally responsive, caring and inclusive of all and where people love to work” (Organization D, 2014).

The core values are:

- Service and Excellence

- Equality and Diversity
- Creativity and Innovation
- Co-operation and Partnership

These values are beginning to become integrated into working practices as well as publicity materials. Insights Discovery as part of employee development feeds into the humanistic rhetoric;

“We place people at the centre of everything we do..We support our staff to strive for excellence and to be the best they can.. We create an environment where our people can thrive” (Organization D, 2014).

## **5.6 Organization E**

### **5.6.1 The Organization**

Organization E is the UK's largest and leading ports group, having an annual turnover of over £470 million and employing approximately 2000 employees. Its origins can be traced back to the British Transport Docks Board established in 1962. The company have 21 ports, which handle a quarter of the UK's seaborne trade in England, Scotland, and Wales, including Immingham, the UK's premier energy port and largest in terms of tonnage; and Southampton, the UK's number one cruise port. Humber Estuary Services (HES) is part of Organization E and includes the four Humber Ports of Grimsby, Immingham, Hull and Goole. Organization E is also the Competent Harbour Authority for the River Humber, one of the busiest waterways in the British Isles.

Organization E's ports, together with other transport-related businesses that constitute the Organization E group, form a UK-wide network capable of handling a 150 million tonnes of cargo per year, ranging from containers from the Far East to forest products from the Baltic. Commodities handled include animal feed, oil, coal, fresh produce, cars, and steel. The group's other activities include rail terminal operations (Hams Hall), dredging (UK Dredging), and marine consultancy.

Organization E makes an essential contribution to the UK's economic life by supporting trade and enabling growth. It is estimated that their ports support around 84,000 jobs and contribute £5.6 billion to the UK economy every year. Plans to invest more than £500 million in new projects are expected to boost their annual contribution by a further £1.75 billion (Organization E website)

The Organization E website claims that this significant national contribution depends on a strong commitment to the welfare and development of their people. Although their approach to learning and development is not as sophisticated as in the previous case studies, they refer to it in their Corporate Responsibility Report quoting;

“2,881 recorded instances of participation in training during 2012 and 1,296 e-learning courses undertaken by employees” (Organization E, 2012).

The document also refers to an online Performance Development Review system.

The HR team in the Humber area are primarily concerned with personnel issues and their focus and integration with the business is based around compliance and legislation, and tending to the ‘just in time’ needs of managers. Although classed as important from an operational point of view, HR is nevertheless seen as a peripheral function. The team also take on the role of training administrators, responding in a reactive and ad hoc manner, offering quick fix solutions to short term operational issues. Whilst they organise and record mandatory skills training, they do little to identify other more complex training needs within the organization.

### **5.6.2 Commissioning**

Organization E originally partnered with the University of Hull Logistics Institute and since then the relationship has steadily grown. Organization E are now Corporate Partners of the School and engage in a full range of activities.

In 2008 we were approached by the Personnel Manager at Organization E, Hull regarding a supervisory training programme. A meeting was subsequently held with the Organization E Dock Master Humber, the main sponsor of the programme. He had observed a skills gap and believed that partnering with the University could be a way to

persuade supervisors to learn new skills, engage in development and galvanise alignment with the management agenda. His idea was to run a skills programme, training supervisors on how to use and follow company policies.

After extensive discussion with the University however, he saw merit in broadening the delivery to become an accredited supervisor development programme. He assumed that this would not only add more kudos to the programme but would also be a positive PR exercise for HR/learning and development in the company. The combination of paternalism and the Dock Master's enthusiasm, seniority and respect within Organization E contributed to the uptake of the programme and its acceptance at senior levels. Although he was not officially connected to the HR team and had no HRD professional qualification, he did however have a strong view that development was important for the organization and took on the role of training champion with zest and determination.

The accredited nature of the programme represented an ambitious departure from previous training offerings which were generally low level and delivered in house. The investment was far removed from what was considered 'normal' in terms of finance and time.

The publicised aim of the Supervisor Development Programme was to broaden perspective, develop supervisory skills and enhance the overall performance of the organizations' supervisors. Most had been promoted from within their own teams and Organization E was keen to give them the academic and professional tools to be successful on their progression up the management ladder. The HR Team and senior managers saw the programme as a justifiable way of getting supervisors 'on side' and encourage their participation and buy in.

It was anticipated that the targeted participants would have low interest in academic credits, (most participants had no or low level qualifications, many had not taken part in any formal learning since school), however the resulting programme was University accredited with 60 credits at Level 4. Although only one person ultimately has used the credits towards a part time Business degree (sponsored by Organization E), the

accreditation came to be seen as a highly significant factor in legitimising the programme and making it attractive to potential participants.

*“All my family are really proud that I’m studying at University. I never thought I’d be doing something like this!”*

*[Thomas, Participant, Organization E]*

The programme was designed to teach and enhance leadership and management qualities, as well as improving the confidence, of those new to the supervisory role. We have now run 5 cohorts of 12 people at the Business School.

The programme focused on four 2 day modules:

- Managing Self
- Leading Teams
- Management Skills
- Leading Change

By the end of the programme participants had:

- Taken a fresh look at their approach to supervising and influencing others.
- Gained feedback from peers, direct report and managers, using tests and activities to understand their personal effectiveness and approach to supervision.
- Devised a personal development plan as a first step towards their continuous professional development.
- Begun to implement their personal development plan, using the material covered on the workshops to change and develop the way they perform at work.

Organization E achieved:

- More effective organizational communication and improved motivation.
- A proactive orientation towards change.

The modules run at 6 week intervals, which allow participants to write a formal assignment in between. Participants also complete a performance enhancing project which is a culmination of the programme learning and focuses on building efficiencies within the business. Delegates were tasked with researching their chosen subject, writing a report and presenting their findings to both academic leads and sponsors of programmes.

Organization E is a bureaucratic, hierarchical organization with a functionalist approach to training. A culture of hard work and long hours predominates and employees are expected to be committed and loyal. The focus of the business is on productivity and efficiency with ever increasing pressure to drive costs down whilst maintaining quality standards. The brief for this programme - to set apart supervisors from the workers and realign them with management - represented a more behaviourist approach, concentrating on behaviours that can be observed and measured. According to Gredler (2001), behaviourism makes three assumptions about learning; observable behaviour is more important than understanding internal activities, behaviour should be focused on simple elements, specific stimuli and responses, and learning is about behaviour change.

Huberty and Kramlinger (1990) state that the behaviourist approach is based on the fact that learning occurs primarily through the reinforcement of desired responses. Laird (1985) affirms that the desired behaviour will be repeated by the learner if positive reinforcement follows the behaviour . In this case "learning is seen as a sequence of associations between stimuli and responses" (Weinberger, 1998:82). The mind is viewed as a "black box" in the sense that response to a stimulus can be observed, overlooking the possibility of thought processes occurring. In exchange for the required change in behaviour, Organization E offer positive reinforcement by means of a £200 payment for passing the programme and also promise the possibility of future promotion.

### **5.6.3 Delivery**

The Managing Self module is delivered by me at the Business School, and the Insights Discovery workshop forms part of this.

Organization E invested £19,600 per cohort although initially 60% of the cost was contributed by ECIF funding. The importance of this funding should not be underestimated as it is certain that without it the initial programme would not have happened. Thankfully the funding gave us an opportunity to prove the value of the programme and subsequently Organization E were happy to go ahead even when the funding opportunity was no longer available.

As with Organization D, investment in the programme is considered holistically and Insights Discovery is viewed as another tool used in its delivery rather than a standalone entity. Its merits are evaluated along with the module as a whole and judged by positive dialogue, comments on 'happy sheets' and ultimately by the cost saving projects.

*"The programme was a great success, for example, savings made by one of the projects originated in Cohort 1, Electrical and Operational costs at the lockhead, more than paid for the cost of the programme."*

*[Charles, Dock Master of the Humber Ports at Organization E and project sponsor]*

Promotion of the programme appeared to be good and as previous participants spoke about their successes back in the workplace, interest steadily built. A waiting list subsequently developed which resulted in a sense of competition to get on to the course. Participants attended from different parts of the business in Grimsby, Immingham, Hull and Goole and did not know each other before the start of the programme. Some, who were keen to learn and progress in the business had requested to attend whilst others were attending following discussion and recommendation by their manager as part of the appraisal process. This appeared to be a surprisingly positive outcome from an appraisal system that was viewed by most as a 'paper exercise'. It was apparent that employees and line managers were generally resentful of the performance management process, perceiving it to be a 'waste of time'. Participants said that in most cases nothing was done with the information and the process was more about 'ticking a box' than managing performance.

Another group of participants had received a letter at their home address telling them to attend, which was interpreted as a blatant critique of their current performance. They then assumed that the programme had been set up to reform or correct bad behaviour and understandably this led to resistance and cynicism. These suspicions, along with the fact that many were expected to attend on their days off, made for an interesting mix of attitudes and behaviours and presented a real challenge to deliverers.

The appearance of this mandatory aspect of the programme changed the dynamics considerably and revealed to participants some otherwise hidden agendas. Ultimately therefore groups consisted of those who wanted to learn and those who were there under duress. Many felt intimidated and threatened by the prospect of having their work and academic performance publically scrutinised. This fear was exacerbated by rounds of redundancies taking place throughout the programme, in many cases impacting personally on programme participants.

It is interesting that despite initial scepticism surrounding the actual purpose of the programme, be it punitive or developmental, once on the programme, participants engaged fully. This is partly attributable to the skill of facilitators who were able to 'pull' people out of their belligerence and see a more positive side to the experience. Their motivation became the desire to learn new things, gain promotion or get a new job outside of the organization.

The academic nature of the programme led to questions about how some aspects related to participants' work contexts. Although a small minority had office based roles e.g. HR and finance, the majority were dockside workers with little or no previous qualifications, they worked shifts, and had limited access to computers. Initially it was understandably hard for them to see how completing the formal assignments would help them do their job better. It was a challenge to encourage some participants to engage with the academic element of the programme which was necessary for the accreditation. Some approached the programme with a training mentality – as was normal in their workplace – and it was necessary to develop a reflective and more critical viewpoint. This was no easy task but to their credit, all participants made a valiant effort and passed the programme successfully.

#### **5.6.4 Senior and line management commitment**

The programme has been sponsored throughout by the Dock Master of the Humber Ports at Organization E and he has conducted a motivational opening speech at each induction outlining the importance of this personal and organizational development initiative and how he hoped everyone would actively engage with the process. He has also attended final presentations and celebratory award giving event. It is interesting that another senior manager also spoke at the opening the inaugural programme and the tone of his speech was very different. He spoke of the need to correct poor behaviour, the necessity to come up with money saving ideas and present them to senior managers and directors. This filled the group with dread and implied a punitive, coercive dimension that had not previously been referred to. Needless to say this manager was not asked to speak again, but it did raise questions about the meaning given to the programme by other managers in the business.

Commitment is particularly evidenced by engagement with the group projects and the final presentations and celebratory awards event are always well attended by directors and line managers. Perhaps because the presentation is delivered to senior managers, university staff and colleagues on the programme, participants put more effort into the group projects than to any other part of the programme, including their individual assignments. The stature of the audience certainly contributes to the sense that this is a prestigious event, offering participants an opportunity to raise their profiles and voice their opinions. This is considered to be a benefit of the programme but may also be viewed as a cause for concern as the 'safe' adult learning environment desired by many who have been out of education for some time, is replaced by exposure and potential vulnerability. Participants who once 'flew under the organizational radar' become visible to their peers, line managers and senior management, falling under the organizational spotlight. This can be perceived on one hand as empowering, whilst at the same time making them susceptible to the judgements of themselves and others in relation to personal and organizational expectations.

Management commitment is also essential in order to combat negative ‘banter’ back in the workplace about participants’ attendance on the programme, and to ensure that enhanced expectations after the programme, for individuals and the organization are managed.

Rhetoric suggests that management commitment does not transcend through all levels of the organization and some participants speak of lack of interest shown by their line managers. Some did not have much input or interest in the participants’ choices of topics or progress on the course in general. Some line managers also displayed little evidence of interest in whether or not participant’s individual learning had wider organizational benefits.

The level of apathy appears to have improved as the programme has repeated and developed a positive reputation. Stories of its success have spread both formally, via articles and photographs in the internal magazine and newsletters, and informally by conversations and personal stories.

The high profile nature of the presentation is visible in the fact that participants who generally wear high visibility jackets to attend the modules, arrive in suits and ties. This is symbolic in that the programme is not simply an accredited University course but an important management development intervention. Recommendations are taken seriously and participants are frequently asked to support the implementation of their organizational projects on the basis of newly acquired knowledge and skills. Participants feel an enormous amount of pride and satisfaction as they see their project work translated into new working practices and this recognition serves to validate their effort and work on the programme.

As with the previous cases, this programme has continued to run throughout the recession period, sending out a message that “Organization E is dedicated to training and has an extensive staff development programme.” (Organization E, 2014)

Again it should be noted that commitment to the programme cannot be equated to commitment to the Insights Discovery model. However, as the model is an integrated

part of the module and therefore the programme, it is impossible to disentangle one from the other.

In this particular context, my own observations are that, despite having a critical mass of participants that have gone through the Insights Discovery model, the tool is not embedded to any extent within the organization. There is no consideration given to it by management and it is viewed as 'just another tool used on the programme'. This may be due to a multitude of reasons e.g. lack of recognition of the benefits of self-reflection, lack of self-reflection skills, the nature and environment of work, commitment to the programme as a whole, frequent changes in staffing, redundancies occurring during the modules etc. but perhaps the most important influence is focus of the organization on changing work related behaviour rather than the process of learning about self. That said however, some individuals engaged enthusiastically and reported that Insights Discovery had helped them to self-reflect and make significant personal changes as a result.

#### **5.6.5 Relationship and relevance to business objectives**

Although Organization E's business objectives appear very well hidden, their Corporate Responsibility Report 2012 states "Our people are key to our success" (Organization E, 2012).

The programme fits with this statement in the respect that by giving supervisors the opportunity to develop confidence when dealing with performance issues they will ensure better outcomes for the business.

What is distinctive in this organization is that the programme was openly portrayed as a management development initiative. It came into existence to ensure supervisors, who had been promoted from the ranks, saw themselves as managers and not 'one of the lads'. The driving force was for them to take on a management perspective and 'play on the management team'. The naming of the programme as 'Supervisor Development Programme' is symbolic and indicative of the divide between management and workers, as it was considered that reference to the term 'Management' would alienate participants and deter them from attending.

As mentioned above, from an organizational viewpoint the programme's role was primarily as a management development vehicle. There is also an acknowledgment however that participants' commitment is almost exclusively at an individual level, focussing on the extent to which the qualification could offer personal benefits and opportunities for career advancement, as opposed to the organizational benefits.

Some participants observed that the programme was more about 'providing evidence that Organization E developed its staff' rather than being genuinely keen to develop employees. There was also a strong perception amongst the participants that the programme was a punitive intervention, punishing them for 'previous bad supervisory behaviour'. This view was supported by the fact that many felt 'forced' to attend the programme against their will. These interpretations prompted a somewhat cynical engagement in the programme, particularly during the first module.

Satisfyingly however, at the end of the programme, participants regarded themselves as more confident, more knowledgeable about the business and even began to question and challenge their own managers in regard to their management practices.

## **5.7 Summary table**

The table that follows categorises the interventions in relation to the themes explored in this chapter. This summary table is included in order to identify which organizational factors were instrumental in determining the level of engagement with the tool and also to understand the extent to which these factors have actively contributed to interpretations of the model by individuals and their organizations.

**Table 1: Organizational Summary Table**

	<b>The Organization</b>	<b>Commissioning</b>	<b>Delivery</b>	<b>Senior and line management commitment</b>	<b>Relationship and Relevance to Business Objectives</b>
Organization A	<p>Large, global, private sector. 11k employees.</p> <p>Small, integrated L&amp;D function with an 'organizational development' orientation.</p> <p>Striving to become a 'learning organization'.</p> <p>Unitarist assumptions.</p> <p>Insights Discovery tool deeply embedded. Used for all office based staff.</p> <p>Rolled out globally for approximately 15 years.</p>	<p>Model requested by line managers – as part of team building days or standalone workshop.</p> <p>To improve personal relationships and build greater understanding amongst team members.</p> <p>Programme seen by L&amp;D team as a way of visibly contributing and a source of power.</p> <p>High financial investment although minimized by internal delivery.</p> <p>Feedback only sought in terms of positive rhetoric.</p>	<p>Model delivered as a standalone tool.</p> <p>1:1 coaching, as part of team building days or Insights Discovery Workshops.</p> <p>In house delivery by accredited practitioner.</p> <p>Cohorts made up of existing or newly formed.</p> <p>Teams repeat tool every 18 – 24 months.</p> <p>Participants nominated by managers.</p> <p>No competition for places but participants keen to attend.</p>	<p>High commitment to the model demonstrated by continued and widespread use.</p> <p>Model is visible in offices – colour bricks, team wheel posters and on the intranet – personal web pages and email signatures.</p> <p>Managerial rhetoric suggests links to improved team work, valuing diversity and consideration of differing perspectives.</p>	<p>Model fits with competency framework, Vision, Values and Brand Personalities.</p> <p>Supports aspiration to be a 'learning organization'.</p> <p>Model supports declaration of being a progressive and forward thinking organization who values self-development, lifelong learning and team work.</p>

	<b>The Organization</b>	<b>Commissioning</b>	<b>Delivery</b>	<b>Senior and line management commitment</b>	<b>Relationship and Relevance to Business Objectives</b>
Organization B	<p>Large, private sector. 300 employees.</p> <p>Awards: Sunday Times Top 10 Best Company to Work For and Investor in People.</p> <p>Humanistic approach with employee learning and organizational development high on the agenda.</p> <p>Core philosophy – ‘a great place to work and a great company to deal with’.</p> <p>A small, integrated HR team with a mainly administrative role and little influence.</p>	<p>Model instigated, ‘owned’ and driven by the Finance Director.</p> <p>Aim: to improve team work and communication.</p> <p>Investment to date c£30k.</p> <p>No formal evaluation – success judged on positive rhetoric.</p>	<p>Model delivered as a standalone tool.</p> <p>1:1 coaching, as part of team building days or Leadership Challenge Programme.</p> <p>Delivered to 110 staff members including Directors.</p> <p>External delivery on and off site by accredited practitioner.</p> <p>Cohorts made up of individuals from different part of the business.</p> <p>Participants nominated by managers to attend.</p> <p>Participants keen to attend and join the ‘Insights Club’.</p>	<p>Well supported by Directors and Senior Managers.</p> <p>Continued to run during recession when many organizations were cutting back on L&amp;D.</p> <p>High visibility maintained by office displays, Insights Discovery ‘language’, profiles stored on shared drive for all to read.</p> <p>Model promoted as a way to improve teamwork and appreciate diversity.</p>	<p>Model seen to support Top 10 award and liP.</p> <p>Viewed as a ‘good thing’ to do.</p> <p>Supports the ‘family’ approach, values and behaviours which employees readily buy into.</p> <p>Strong sense that the model is directly relevant to staff working better together and performing more effectively.</p>

	<b>The Organization</b>	<b>Commissioning</b>	<b>Delivery</b>	<b>Senior and line management commitment</b>	<b>Relationship and Relevance to Business Objectives</b>
Organization C	<p>Large family business. Promotes itself humanistically as being ‘very true to our family values and people are unquestionably at the heart of everything we do’</p> <p>‘Everyone is given the chance to learn new skills.’</p> <p>Behaviourist traits evident – the programme is more about learning to work better and achieve more than self-actualization.</p> <p>Paternalistic structure with Managing Director holding a powerful and controlling role. Directive and coercive management style.</p> <p>A small, integrated HR/L&amp;D team with a mainly administrative role and little influence.</p>	<p>Management Development Programme instigated by the then HR Director but ultimately controlled by the Managing Director.</p> <p>Aim: to identify and develop future talent.</p> <p>Investment to date c£250k.</p> <p>‘Happy sheet’ evaluation not carried out on the specific tool, but on the module and programme as a whole.</p>	<p>Delivered as part of the personal development module within the Management Development Programme – a two week residential, non-accredited programme.</p> <p>Delivered to 80 staff members.</p> <p>External delivery off site.</p> <p>Cohorts made up of two individuals from each part of the business.</p> <p>Participants identified as ‘high fliers’ during performance review process and nominated by managers.</p> <p>Strong competition for places.</p> <p>Seen as a high profile event with potential for programme to ‘make or break careers’.</p>	<p>Management Development Programme is strongly supported by Managing Director, HR Director and Senior Managers. They contribute to delivery; attend at the start and for final presentations.</p> <p>No overt signs exist to suggest the model has been adopted as a standalone tool.</p> <p>Evidence suggests that senior managers have used the model outcomes to identify specific talents and ‘fit’ with the organization.</p> <p>Continued business – 10 cohorts to date.</p>	<p>Management Development was seen by original instigator as a ‘good thing’ to do and has continued support from new HR Director.</p> <p>The programme serves to align managers and develop a common corporate culture.</p> <p>The model supports the ‘family values’ and develops the humanistic, self-actualization discourse.</p> <p>‘we are especially keen on developing individuals and helping them achieve their goals and be the best they can be’.</p>

	<b>The Organization</b>	<b>Commissioning</b>	<b>Delivery</b>	<b>Senior and line management commitment</b>	<b>Relationship and Relevance to Business Objectives</b>
Organization D	<p>Large, social enterprise – employee owned. 1500 employees. Awards: Investors in People – Silver Status Strong humanistic approach from Chief Executive. 'The business is people driven and learning, skill development and self actualization will incentivise and motivate employees'. Transition from NHS to social enterprise has posed complex challenges in terms of staff attitude and expectations.</p>	<p>Management Development Programme instigated by Chief Executive and Organizational Development Manager. Originally aimed at helping Directors to focus on ORGANIZATION D strategy and future aspirations. Now open to all managers in order to increase capacity to operate proactively and at a strategic level. Drivers were the desire for improved managers, who are more responsive to change. Investment to date c£125k. Evaluation not carried out on the specific tool, but on the module and programme as a whole.</p>	<p>Delivered as part of a Management Development Programme, accredited with 40 credits at Level 7. Delivered to 100 staff members to date. External delivery off site. Cohorts made up of individuals from across the business. Participants are nominated by managers during performance review consultation. Seen as a high profile event. Some competition exists for places and generally participants are keen to attend. Potential for participants to be made visible and voice their ideas.</p>	<p>The Management Development Programme is strongly supported by the Chief Executive and Directors. They sponsor projects and attend final presentations. Projects are taken seriously and most go on to be implemented. No signs to suggest the model has been adopted as a standalone tool or that its use is encouraged by senior managers. Individual feedback suggests it has been meaningful and aided self-development.</p>	<p>Model seen to support liP award. Paradox exists between humanistic discourse of Chief Exec and the drivers for the programme i.e. the collective development of management and improved management processes. The model supports Organization D's self actualization agenda; ' We support our staff to strive for excellence and to be the best they can be' Aiming to be 'a place where people love to work'.</p>

	<b>The Organization</b>	<b>Commissioning</b>	<b>Delivery</b>	<b>Senior and line management commitment</b>	<b>Relationship and Relevance to Business Objectives</b>
Organization E	<p>Large private sector. 2000 employees. Bureaucratic, hierarchical organization with paternalistic, functionalist approach to training. Culture of long hours and coercive management. Training measured by 'instances of participation'. HR seen as peripheral function. States 'People are key to our success' however behaviourist approach dominates. (Focus on changing behaviour rather than learning.)</p> <p>Success measures reported on are absenteeism , turnover and number of female employees.</p>	<p>Supervisor Development Programme originally instigated by Personnel Manager and Humber Dock Master (who now sponsors the programme). Aim; to change supervisor behaviour and align them with management rather than the workers. Investment to date c£95k. Doubtful whether first programme would have gone ahead without 60% ECIF funding. Evaluation not carried out on the specific tool, but on the module and programme as a whole.</p>	<p>Model delivered as part of the Supervisor Development Programme, accredited with 60 credits at Level 4. Delivered to 60 staff members to date. External delivery off site. Cohorts made up of individuals from across the Humber region. Participants nominated by managers. Programme gaining status within the organization. Some competition exists for places but many participants are 'forced' to attend. Potential for participants to be made visible and voice their ideas.</p>	<p>The Supervisor Development Programme is strongly supported by Dock Master. Senior managers sponsor projects and attend final presentations. Line manager support varied. Projects taken seriously and most go on to be implemented. No signs to suggest any interest in the model from senior managers. Individual feedback suggests the model has been meaningful and encouraged personal reflection and change.</p>	<p>Dock Master viewed programme as positive PR for L&amp;D in the company. Unashamedly a management development initiative aimed at change supervisor behaviour and improving performance. No personal learning agenda. Model supports the 'People are key to our success message'.</p>

## 5.8 Concluding remarks

In this chapter I have attempted to describe the five organizations in which my research has been conducted using the following themes;

- The organization
- Commissioning
- Delivery
- Senior and line management commitment
- Relationship and relevance to business objectives

This consideration has allowed the construction of a contextual backdrop, uncovering the organizational milieu and explaining how the intervention was staged in each case.

The themed headings have facilitated a detailed description of each organization and allowed useful comparisons to be made – highlighting differences and similarities.

The study has revealed that the intervention itself – the Insights Discovery workshop – whether delivered as a standalone workshop or as part of a bigger programme, was delivered identically in every case. However, whilst some factors are generic, others are distinct and unique to the organization, with the context, setting and participants being varied and multi-faceted.

Some organizations had requested the model specifically and others were ‘given’ the tool within a larger programme offering. It was clear that at some level all interventions had at least a loose connection with organizational objectives.

The perceptions of participants and commissioners varied according to the local context, type of programme, level of accreditation, approach to HRD and organizational aims.

Chapter 6 now presents the first of three chapters that use a key theme, identified from the empirical material, to explore the data. This chapter surfaces the issues of gender stereotyping and discrimination, challenging the Insights Discovery claim that “there is no opportunity for bias or boxing in the Insight system” (Insights®, 2012). Viewed

through a critical lens, it discusses the perceived consequences of personality profiling on participants and guides the reader through the interpretations made.

## **6. Stereotyping, gender and the Insights Discovery model**

### **6.1 Introduction**

The previous chapter examined the organizational context within which the Insights Discovery model was used and provided a useful narrative based on five distinct themes:

- The organization
- Commissioning
- Delivery
- Senior and line management commitment
- Relationship and relevance to business objectives

The thesis now aims to develop this phenomenological study further by elaborating on three key themes that emerged from the research data. These themes are;

- Stereotypes
- Power
- Colour

Each theme will be fully investigated within the next three chapters.

Inevitably the evolvment of these themes was the result of my own interpretation and conjecture. I am fully aware that they are only relevant to the data I collected at a particular moment in time and represent only three of many possible themes that could have emerged had other participant stories been included in the study. The aim of the following three chapters therefore, is to represent participants honestly, whilst being ever conscious of my own personal biases.

The data analysis process itself and the challenges it presented are fully discussed in Chapter 4, however the links between Insights Discovery and stereotyping were apparent well before this stage. The Insights Discovery guide tells facilitators to stress

'Do Not Stereotype', which by its very inclusion implies that there are opportunities for this to happen. The data suggested, unsurprisingly, that labelling individuals led to stereotyping and assumptions were then made based on the labels given. This not a new revelation by any means, and many authors have produced similar findings, for example, Thompson and McHugh (2009) state that personality tests serve only to embed stereotypical beliefs and expectations in organizations.

This chapter has been included to reflect the strength of emotion and feeling revealed within the data which fell under the umbrella of stereotyping. In particular this chapter focuses on gender stereotyping and discrimination, thereby challenging the Insights Discovery claim that "there is no opportunity for bias or boxing in the Insight system" (Insights®, 2012:156). Viewed through a critical lens, it discusses the effects of personality profiling on participants, guiding the reader from findings to interpretations, and showing the path taken. Inevitably this process has involved some conjecture however the aim here is to represent participants honestly, whilst being ever conscious of my own personal biases. The development of theories from phenomenological findings, which apply to situations beyond the participants or cases studied, needs to be done transparently in order to have validity.

The dual role of this chapter is therefore firstly to report the findings robustly, including quotes from participants to illustrate points, and secondly, to make interpretations and linkages relating the findings to previous research or commentary, to personal experience or even to common-sense opinions, and developing tentative theories.

This chapter thus specifically addresses the research question;

'What are the implications and consequences for individuals and organizations of using the Insights Discovery tool?'

## 6.2 Explaining stereotypes

“For the most part we do not first see, and then define, we define first and then see. In the great blooming, buzzing confusion of the outer world we pick out what our culture has already defined for us, and we tend to perceive that which we have picked out in the form stereotyped for us by our culture” (Lippmann, 1997:54).

A stereotype is a fixed, over generalized belief about a particular group or class of people (Cardwell, 1996). There is a human tendency to put people in boxes in order to create simple rules of how to operate. Stereotypes help us to simplify and make sense of the social world and understand others with minimal effort, allowing us to respond rapidly to situations using previous experience as a guide (Operario and Fiske, 2001). However, despite the fact that stereotypes are essentially a simplification tool, they are infinitely complex in nature, hard to identify and difficult to control. The power lies in their ability to influence the behaviour of both individuals engaged in and those being stereotyped. This produces a dangerous illusion that stereotypes are grounded in reality.

This confusion about what is ‘reality’ is compounded by the “thicket of unreality which stands between us and the facts of life” (Boorstin, 1992:11). Awareness that we each see things differently can lead to helpful conversations on the value of diversity of perception – helping teams work better and smarter together. Psychometric profiles have the power to make these positive discussions happen, unfortunately however they are very often used as a stereotyping tool by team members (Lewis, 1999).

Stereotyping leads to social categorization producing a “them” and “us” mentality which leads to in-groups and out-groups, which can unconsciously make members feel vulnerable to bias, prejudice and disadvantaged. The following extract illustrates how ‘in and out groups’ emerged after an Insights Discovery workshop;

*“When we got back to the hotel on the night some of the group were messing about, basically showing off about how red they were and telling stories about times they’d cut people off and told them to ‘cut the crap and get on with it’.*

*There were a few jokes made about the other colours and one in particular stuck. So this person who was blue, spent the whole time being called Spock – the ‘joke’ being that he was devoid of feeling and emotion like the Star Trek character. You could clearly see it was upsetting him but the reds wouldn’t let it go, saying ‘it’s just a joke’ etc. and it carried on throughout the two week programme. I felt like the Insights model had given them ammunition – bullets to fire at the weaker members of the group.”*

*[Elizabeth, Participant, Organization C]*

As in the account above, we make generalizations, diminish individual differences and presume each member has the range of characteristics and abilities that we assume other group members have. The category is viewed as a homogeneous entity, not by malevolent action but as part of an unconscious process. Most people are unaware of their stereotyping and the impact their bias has on their behaviour and decision making.

The Insights Discovery model presents the notion that everyone is unique with a different view and interpretation of the world. Although apparently aligning with social constructionist ideals, this paradigm would indeed question whether it is even possible to demonstrate the existence of personality as a unified or stable aspect of an individual. The Insights Discovery model is a paradox – on one hand speaking of unique individuals, whilst at the same time labelling participants – placing them in colour categories in a bid to describe how they make sense of the world. An Insights Discovery practitioner whom I encountered even went so far as to describe people by their numbered position on the Insights Discovery wheel.

A nominalist view would argue that whilst these labels are general concepts representing the common behavioural preferences of participants, they are nonetheless ‘empty concepts that have no reality independent of their existence in the thought of an individual’. However, meaning is crafted from thought and is therefore powerful in creating stereotypes which are “responsive to intent” (Wilson, 2003:45).

Certification as an Insights Discovery Practitioner demands that we stress 'DO NOT STEREOTYPE', however this is unquestionably the basic premise of the model. Despite Insights Discovery claims that "there is no opportunity for bias or boxing in the Insights system!"(Insights®, 2012), clearly these opportunities are present and can be readily exploited on varying levels of consciousness for unscrupulous ends. The inherent desire to categorize leaves employees exposed and vulnerable for organizations to use the results to stereotype and make assumptions about their ability to perform. In this study there was evidence of managers using flawed thinking and a tendency not to go beyond initial judgements or take the time and effort to form more meaningful, deeper level understanding of their employees. This is illustrated perfectly by James – a team manager - in his comment below;

*"Insights is a useful model – it's engaging and it produces some good information. By looking at the team colour wheel I can quickly see where everyone's strengths are and who's going to be good at doing what."*

*[James, Participant, Organization B]*

This is a perturbing statement given that the model stipulates that colours are not about competency, just about the individual's preferred behaviours. Also the team colour wheel gives no indication to an untrained observer of a person's second, third or fourth colour energy which provide crucial pieces of additional information.

The research uncovered stereotyping in a variety of guises. Some employers began searching for 'round pegs in square holes' with a view to 'moving them to a more suitable role' or in some cases out of the organization. Others looked to identify those who were a 'fit' with the Organization Culture and mirrored the dominant personalities at a senior level - highlighting them as 'having potential'. It was evident that a person's personality preference could, given the right organizational conditions, be used as a source of power – a tool to manipulate rather than to empower.

The simplicity of the model is revered as a positive benefit, making it easy to remember and use. On another level, it could be said that the 'red', 'green', 'yellow' and 'blue' label given to participants during this development process is over simplistic and serves

only to strengthen existing stereotypes already present within the organization. In particular, there is a strong sense that Insights Discovery may reinforce negative gender stereotypes.

### **6.3 Gender stereotypes**

Gender is a social construct imposed upon biological sex, learned through socialization and educational processes, and continually reinforced by the dictated norms or social expectations of men and women at all stages of their life. “Women are socialized to be passive, accommodative and intuitive, while men are socialized to be aggressive, active and dominating” (Rajan and Krishnan, 2002:197).

Wilson argues that “the reason we have a common belief in gender differences in personality is because men and women have learned to ‘do gender’ (2003:175). Gender stereotypes refer to “the beliefs people hold about members of the categories man or woman” (Archer and Lloyd, 2002:19). They occur as part of the natural socialization process we all experience from birth and are usually acquired before children reach school age and the process then continues to develop until adolescence. Girls are taught to be feminine (considerate, gentle and quiet) and boys to be masculine (aggressive and independent) and once these sex roles are assimilated, the accompanying characteristics and attitudes become integrated into the self-image.

The importance of self-image is confirmed by Korman, who states that “individuals will engage in and find satisfying those behavioural roles which will maximise their sense of cognitive balance or consistency” (1970:32). If a woman’s self-image incorporates the feminine role aspects she may be less likely to acquire those job characteristics or engage in those job behaviours associated with a ‘masculine’ position since such characteristic and behaviours are inconsistent with her self-image. Megargee’s 1969 study illustrates the way in which a sex-role image can prevent a woman from exhibiting certain ‘masculine’ characteristics, assuming that they were inconsistent with the female’s self-image of being ‘feminine’. Thus it may not be only overt discrimination or covert prejudicial attitudes held by others that hinder women, but the women herself

who is reluctant to enter 'male roles' since she may view the requisites for successful performance as being inconsistent with her feminine self-image.

Mead (2001) notes that the successful or independent woman is "viewed as a hostile and destructive force within society" and consequently, that a woman's femininity is called into question by her success. Horner's (1972) similarly suggests that many women avoid success because of fear of rejection and anxiety that they will be perceived as less womanly. Myers and McCaulley (1985) found that women tended to view themselves as intuitive and feeling, while the men saw themselves as sensing and thinking. These results are mirrored in my experience of Insights Discovery as women tend to rate themselves as feeling (Green/Yellow) and men thinking (Blue/Red).

Not only are gender stereotypes descriptive, they are also prescriptive – they denote not only differences in how women and men actually are, but also norms about behaviours that are suitable for each – how men and women should be (Burgess and Borgida, 1999, Eagly, 1987, Terborg, 1977).

Until the 1970s, academics "assumed a mutually exclusive view of gender: that people's gender identity was either primarily masculine or primarily feminine" (Bem, 1974:155). Masculinity and femininity were seen "one bipolar M-F dimension" (Constantinople, 1973:405), absolute opposites, with males lacking female traits and females lacking male traits. It was presumed that for "optimal psychological health, men should be as masculine as possible and women should be as feminine as possible" (Bem, 1974:155). This view is supported by Jung (1923), whose work forms the foundation of the Insights Discovery Model. Jung's sexist attitudes are frequently commented on (Anthony, 1990:93). He felt it was natural for women to be the supporters of men (Bair, 2003:775), to feel content being 'contained' by their husbands (2003:388) and to live under the control of a male relative if they were parentless and single (2003:326).

"Women existed to satisfy a man's needs, bear his children and run his house" (Bair, 2003:775).

Only men could "talk exclusively at an intellectual level." (2003:80).

“Man’s foremost interest was his work; woman’s should be the man.” (Sands, 1977:244).

In general Jung did not approve of women’s “mental masculinization”(Bair, 2003:394). He felt it would lead to her becoming neurotic, and whilst he did not encourage formal education, he recommended some form of intellectual work, so as to prevent women from becoming ‘unpleasant’ (Anthony, 1990). He later recognized his views were becoming outdated and defensively admitted that his philosophy of women was “ a convenient philosophy of the selfish male” (Sands, 1977:244).

Constantinople contested the “one bipolar dimension” asserting that “there is enough evidence for separate masculinity and femininity dimensions”. It is therefore possible to measure an individual’s level of masculinity and femininity. “The pattern will be different for most masculine versus least masculine men and most feminine versus least feminine women”(1973:405).

Bem confronted the dominant discourse that “healthy gender identity is achieved by behaving according to society's expectations for one's biological sex” (1974:155). She states that an individual may actually be happier and more balanced if they can display both masculine and feminine behaviours rather than being “strongly sex-typed as either masculine or feminine” (1974:155). For example a woman may be gentle, sensitive, and soft-spoken (traditional feminine characteristics), but also, at the same time, be competitive, independent and assertive (traditional masculine characteristics). Wilson (2003) supports this view as subsequent research shows that men and women use both care-based and justice-based reasoning, depending on the situation.

Bem used the term androgynous to describe an individual with a balance of masculine and feminine traits. She states that “androgyny offers an advantage of greater behavioural flexibility as a person moves from situation to situation in life”(1974:156). This is a view apparently shared by the Insights Discovery model as it encourages participants to use a flexible approach, altering their traits and communication style to suit to different people and situations.

Bem Sex Role Inventory (BSRI) (1974) is now one of the most frequently used instruments for measuring gender stereotypes. It uses self-descriptions to measure the extent to which men and women describe themselves in terms of personality traits that make up the stereotypes for their own and the other sex (Archer and Lloyd, 2002). It is recognised that every individual will possess different amounts of masculinity and femininity. “These categories are not intended to be judgmental”, instead they are intended to highlight differences which lie at the root of gender. “Our perception of our own maleness and femaleness is gender identity [and] gender identity is said to be one of the most basic and most powerful components comprising personality” (Bem, 1974:155).

*Table 2: Bem Sex Role Inventory Traits*

<b>Feminine</b>	<b>Masculine</b>
Affectionate	Acts as a leader
Yielding	Willing to take risks
Cheerful	Ambitious
Flatterable	Willing to take a stand
Compassionate	Analytical
Understanding	Strong personality
Gentle	Assertive
Loves children	Self-sufficient
Soft Spoken	Independent

*(Bem, 1974)*

Wilson questions whether negative stereotyping of women in organizations has originated from the cultural socialization process or whether it can be attributed to organizational role and hierarchical position, resulting in different character traits being used. Wilson argues that the traditional association of men with work and women with home, underlies the dominance of the “male-as-norm” view of employment. She uses

this “male-as-norm” view as a starting point for dispelling myths that sustain “inequality of opportunity and inequality of outcome” in the workplace (2003:7). Jennifer’s story below illustrates how male dominance supplemented by red stereotyping worked together to undermine her position;

*“A project came up at work that needed someone to take the lead and make some changes. I said I’d do it because I was personally interested in the outcome and knew a bit about the situation and the people involved. As soon as I said it, someone else in the meeting said “Oh, just let Ben do it – he’s red so he’ll enjoy ruffling a few feathers”. I looked at Ben knowing that he would go in and get the job done, but that would stir up lots of trouble and resentment in the process. Unfortunately his ‘redness’ trumped my greenness. If I didn’t think I was capable, I wouldn’t have offered to do it. In that moment, I was totally undermined because of my colour energy and maybe also because I’m a woman.”*

*[Jennifer, Participant, Organization C]*

Numerous social psychological studies have highlighted variance in gender stereotypes among different cultures and ethnic groups (Harris, 1994). In a study of gender stereotypes, Williams and Best (1990) discovered similarities existed cross culturally. They found that women were seen as sentimental, submissive and superstitious whilst men were seen as adventurous, forceful and independent” (Sharma and Malhotra, 2007).

Table 3: Descriptive adjective for men and women

Items Associated with Males		Items Associated with Females
Active	Initiative	Affected
Adventurous	Inventive	Affectionate
Aggressive	Lazy	Attractive
Ambitious	Logical	Charming
Arrogant	Loud	Curious
Assertive	Masculine	Dependent
Autocratic	Opportunistic	Dreamy
Clear thinking	Progressive	Emotional
Coarse	Rational	Fearful
Courageous	Realistic	Feminine
Cruel	Reckless	Gentle
Daring	Robust	Mild
Determined	Rude	Sensitive
Disorderly	Self Confident	Sentimental
Dominant	Serious	Sexy
Egotistical	Severe	
Energetic	Stolid	
Forceful	Strong	
Hardhearted	Unemotional	

*Adapted from Williams and Best (1990) (Sharma and Malhotra, 2007:136)*

Men are perceived to be more rational, more focused and assertive, whereas women are generally seen to be more emotional, less able to take risks and better at multitasking. This confirmed Kaufman and Fetters conclusion that “women are assumed to be less assertive, less ambitious and less career orientated than men” (1980:251). Wilson challenges the stereotypical view that women are more emotional than men however, stating that there is little evidence to support this view, but that women are more likely to express emotions that express vulnerability, whereas “men have learned to see the expressing of emotions of ‘weakness’ will bring them negative consequences”. Just as they have learned to do gender, so men and women have

learned to “do” emotion (2003:182). Wilson goes on to explain that “Gender rules, like any set of rules, are outcomes rather than fixed, immutable entities” (2003:68).

Fagenson asserts that “men will perceive themselves as more masculine than will women...and... women will perceive themselves as being more feminine than will men”. Women are seen as “warm, kind, emotional, gentle, understanding, aware of other’s feelings and helpful to others” Whereas men are perceived as “aggressive, forceful, strong, rational, self-confident, competitive and independent” (1990:205). Interestingly, Fagenson concludes that “lower level individuals perceive themselves as being more feminine or other-focused” (Spence and Helmreich, 1978, Kanter, 1977) than those who are located “high in the organizational power hierarchy [who] will think of themselves in more instrumental or masculine terms” (1990:205).

These male/female traits and gender stereotypes are clearly echoed in the colour energy descriptions of the Insights Discovery model and in the extract below;

*“We did an exercise on the workshop which asked us to build up a check list for each colour energy. Clues about body language, verbal signs and environment. When it came to my colour energy which was green – it was all about being sensitive, a shoulder to cry on, plants, drinks, tissues, showing them you care etc. It was a big laugh but suddenly it felt like I was being typecast as my mum – doing a typical women’s role - making coffee, taking care of everyone and wearing my heart on my sleeve. Not really an image I want to have with my colleagues. I don’t think it did me any favours.”*

*[Jennifer, Participant, Organization C]*

Men and women are perceived to have distinct and contrary traits (Unger and Crawford, 1992) and this polarization of male and female characteristics forms the basis of arguments for legitimate social inequality. These beliefs have proved resistant to change, remaining essentially unaltered since the late 1960s (Ruble and Ruble, 1982, Dodge et al., 1995, Leuptow et al., 1995). The differences are willingly accepted by both men and women and are even considered desirable, representing an ideal state (Broverman et al., 1972, Broverman et al., 1975).

The influence of sex stereotyping frequently results in women being judged as unsuitable applicants for senior, challenging jobs (Taylor and Ilgen, 1981) and they are perceived as deficient in the characteristics necessary to fulfil traditional male roles and necessary for success in higher-ranking positions (Heilman, 1984, Feuer, 1988). Wilson explains that the reason 95% of bank managers, company directors, judges and university professors in Britain are men is because men are “more competitive” and because “dominance is a personality characteristic determined by male hormones”(1994:62).

Fox and Prilleltensky consider that the psychometric testing industry is in part responsible for Wilson’s claims, which they see as providing “scientific evidence of women’s inadequacies”(1997:253). This constant comparison and criticism of women leads Lenney to point out the “potentially debilitating problem” low self-confidence can cause and that social pressures such as discrimination can impair women’s achievements (1977:1).

Lenney notes the power of comparison in undermining a woman’s confidence and belief that she can achieve and be successful in a male dominated environment. Women are particularly vulnerable when they are being compared to others. “Women’s self-confidence may be more dependent than men’s upon the characteristics of the specific person to whom they compare themselves”... “the ‘problem’ for women may in fact be that their self-confidence,.. is ..excessively vulnerable to situational influences” (1977:11).

Bowman et al (2011) suppose that even when women have the ability to perform well in professional roles, “personality defects” such as low self-esteem or lack of assertiveness can impede their performance and perhaps be a reason for women choosing to take on less demanding tasks or giving up more easily in the case of failure. Interestingly, both men and women have similar views on what is considered to be ‘man’s work’ and ‘women’s work’. “..both groups share the same conceptions of the

sex appropriateness of general types of activities and share the same disagreements about the appropriateness of specific requirements” (Krefting and Berger, 1979:172).

When judged by the standard set by men, women frequently fail to measure up (Forrest, 1989). These stereotyped conceptions of what women are like and how they should behave continue to have a substantial impact on HRM decisions and inhibit women from progressing upwards in organizations (Heilman, 1980, Heilman, 1984, Heilman and Saruwatri, 1979, Terborg and Ilgen, 1975).

Deaux and Emswiller found that on a male-related task when both male and female perform at an equal level “the male's performance is more strongly attributed to skill, while the female's performance is more strongly attributed to luck” (1974:81). In contrast, women tend to attribute failure to their lack of skill and ability, whereas men more often explain failure in terms of bad luck or task difficulty.

Clance and Imes study into the ‘Imposter Phenomenon’ looked at high achieving women and their inability to internalise their accomplishments. They live in fear of being constantly discovered and exposed as a fraud. Academic success, recognition, degrees, promotions etc. were all dismissed and attributed to luck, good timing or simply having fooled others into thinking they were better than they actually were. “These women find innumerable means of negating any external evidence that contradicts their belief that they are, in reality, unintelligent” (1978:1).

The doubt that surrounds successful women concerning who or what is responsible for their performance perpetuates the devaluation of female competence. The attitudes of organizations have been shown to hinder female managers, particularly in predominantly male environments (Gold and Pringle, 1989). In these situations the ‘golden pathway’ to promotion and success is open to only men (Davies and Rosser, 1986). Characteristics necessary for success in a sex-typed occupation are usually those associated with either the male or female sex-role stereotype. These patterns of occupational segregation draw upon the “one bipolar M-F dimension” (Constantinople, 1973:405). The repeated association of women with ‘soft’ personal skills and men with

'hard' practical competence serves to perpetuate these assumptions. Constant repetition and reiteration may give a process, model or tool the appearance of truth or reality that is incontestable and enduring (Gold and Smith, 2003). Traditionally, some jobs are considered to be 'a man's job' for example, builders and plumbers, which require male traits and characteristics. Other jobs such as receptionists and hairdressers are labelled 'women's jobs' requiring female traits and behaviours. A female type occupation tends to require characteristics associated with femininity, such as helping, nurturing and empathizing, whereas a male type occupation tends to require characteristics associated with masculinity, such as coolness, detachment and analytic objectivity.

It is more likely that a job will be 'sex-typed' when a large majority of individuals in that role are of one sex and when there is an associated normative expectation that this is 'how it should be' (Epstein, 1970:152). The high ratio of men to women in management and the informal belief that this is 'the way of the world' allows management to be sex-typed as a 'man's job', requiring personal characteristics thought to be more commonly held by men than women (Brenner et al., 1989, Hearn and Parkin, 1988). Characteristics associated with successful managers therefore mirror male traits rather than those of females (Bernadin, 1982, Broverman et al., 1975). This results in an enduring stereotype that associates management with 'maleness'. Thus the sex-role stereotype may cause women, regardless of ability to be perceived as being less qualified than a man for management positions.

Although women are increasingly found in equal numbers, they are segregated into traditional female, service roles such as communication, organization and support. These tend to be considered "female specialisms ... [that] "offer less pay, prestige and fewer career promotion opportunities" (Bolton and Muzio, 2008:289). Ramazanoglu (1987) argues that this is a specific control mechanism and like insults, jokes, bullying, vocal violence and sexual harassment, are the sanctions imposed on women to 'keep them in their place'. We live in a culture that in general condones male entitlement and privilege (Van Nostrand, 1993).

HRM with its history of welfare represents such a female specialism and women dominate this particular function. The story below comes from an Insights Discovery Facilitator who has experienced first-hand the way that Insights Discovery labels mirror traditional male/female stereotypes and job role;

*“The Managing Director from Organization C contacted me following an Insights Discovery Session I had run for his senior team. He was concerned that one of his female managers was “too red” for her HR role. In short she was not ‘feminine’ enough for the role. A lengthy discussion followed to alleviate his worries. Shortly afterwards I found that she had been moved out of HR into a Logistics role more suitable for her masculine traits.”*

*[Rachel, Freelance Insights Discovery Facilitator]*

This employee had been working in HR for some time; however her Insights Discovery profile had prompted her manager to reconsider her ‘fit’ with the role. As she was not perceived to fit with the sex-role stereotype of a ‘feminine’ HR worker she was moved on to a logistics ‘male’ role more fitting with her traits.

This manager was unaware of the unfair discrimination act he was a party to and acted presumably for what he assumed were all the right reasons. “raters who discriminate unfairly against a ratee do so for what they believe to be rational reasons, that is, the ratee lacks the requisite characteristics (Dipboye, 1985:117).

The stereotype-fit model is built on the premise that we all possess cognitive blueprints of who would be the best fit person for a job (Dipboye, 1985:117). The differences between appraisal of males and females in certain job roles have also been assessed by Wallston and O’Leary (1981) who conclude that these are not based on competency or skill, but rather on sex status. Wilson talks of “sex as a status characteristic. Since the male sex is more highly valued in management, men’s behaviour is frequently valued more, even when compared to equally effective behaviour performed by women” (Wilson, 2003:58). Buddhapriya confirms that “it is perceived by both genders that male traits are socially more desirable in the work setting than female valued traits” (1999:26).

Broverman et al (1972, 1975) concluded that there is a strong agreement about what constitutes male and female characteristics. Male traits such as competitiveness, logic and assertiveness are more valued than female traits such as kindness and compassion. Resetar reports that some jobs, such as domestic and subordinate roles, require female traits and that these roles “pay less and have less job prestige” (2008:130).

Research by Major et al supports the argument that “women’s sense of personal entitlement with respect to pay is lower than men’s... [they] subjectively devalue their work inputs relative to men” (1984:1410). Schein (1972) also confirms that female characteristics are valued less and women are deprived of developmental opportunities which hinder their chances of promotion .

The devaluing of female traits by both men and women is highlighted in the extract below;

*“The workshop reiterated to me that my style is so much at odds with senior management here. I’m definitely not in tune with the military approach which seems to be flourishing. It feels like an ‘alpha male’ company and I’m too girly to really fit in with the guys. I knew this before, but coming out as green has conveyed it in big flashing lights to everyone else.”*

*[Barbara, Participant, Organization C]*

Thus whilst management rhetoric overtly appears to embrace ‘feminine’ traits and attributes as a strategic resource, it remains far from being feminised (Wajcman, 1999). Lott concluded that “the tendency to devalue competent women, although not invariable, appears to be more the rule than the exception” (1992:54). Numerous social psychological studies have highlighted variance in gender stereotypes among different cultures and ethnic groups (Harris, 1994) however Wilson asserts that “studies of management in different cultures have left untouched the myth that management responsibilities are best fulfilled by men” (2003:64). Although Schein (1973) highlighted the global phenomenon of “think manager, think male” further exploration in 1996 uncovered similar results. Schein et al assert that “the global nature of managerial sex typing among males should be of concern to those interested in promoting gender

equality worldwide...their stereotypical attitudes are apt to limit women's access to and promotions within management internationally" (1996:40).

## **6.4 Organizational discourse and gender**

Wilson (2003) considers that organizational theory is 'gender blind' , stating that the issues of gender that infiltrate all organizations are usually undetected or ignored. There is no acknowledgment that a woman's work experience may be different to that of man as a result of power relations that differentiate society at large (Burrell and Hearn, 1989). Linstead (2000) develops this further, arguing that there has been a deliberate suppression of observable difference for theoretical reasons. It is clear that women face a series of barriers to their progress in organizations (Kelly, 1991), barriers that appear to be mainly ignored in mainstream organizational behaviour texts.

Reducing the obvious barriers must be followed by consideration of the psychological and sociological barriers. This requires an unravelling of the myriad of interacting factors and an understanding of the different values and meanings existing in both men and women.

The term 'organizational discourse' refers, according to Grant, "to the structured collections of texts embodied in the practices of talking and writing ... that bring organizationally related objects into being as these texts are produced, disseminated and consumed" (2004:1). This discourse or language gives the observer an invaluable insight into the views held by the members of the organization and the behaviours and attitudes that exist within. Wilson (1992) discusses how organizations legitimize actions through their language. Analysis of organizational discourse therefore, presented as gender neutral, may hide an underlying subtext which reinforces gender distinctions. Smith developed the phrase "gender subtext"(1988:65) and it is defined Bendl as "a set of hidden, latent, and subtly power-based gendered, gendering, as well as en-gendering processes that systematically reproduce gender distinctions" (Bendl, 2008:51).

We can conclude therefore that “choice of language...demonstrates the social and moral order, in which men and masculinity are valued more than women and femininity”(Wilson, 2010:217). The links between social constructionism and the study of organizational discourse are strong. As Mumby and Clair state “organizations exist only in so far as their members create them through discourse” (1997:181).

Organizational discourse consequently is fashioned without any connection to external reality. Meaning is similarly created through this discourse, which is essentially simply “an institutionalized way of thinking, a social boundary defining what can be said about a specific topic... the limits of acceptable speech or possible truths”. In itself, discourse has no fundamental meaning and as it does not specifically belong to any one individual, it can be constantly adapted. “Discourse affects our views on all things due to its inevitable and ubiquitous nature”(Richards, 2004:309).

Discourses therefore hold immense power in organizations and are intrinsically linked (Foucault, 1998), persistently constructing and reinforcing taken for granted assumptions. In subtle ways therefore, the gender subtext reiterates the dichotomic view of maleness being the norm. Benschop and Doorewaard also draw the conclusion that “gendering is inscribed in day to day organizational practice” with women viewed as lesser citizens. They acknowledge that “in spite of gender equality.. distinctions are meaningful for organizational practice, because they facilitate (re)production of gender inequality” (1998:803).

These studies reveal the “gender asymmetries” that exist in the midst of a “dominant organizational discourse...based on neutrality and equality” (Benschop and Doorewaard, 1998:787). Wilson claims “androcentrism or male-centredness”; gender polarization; and biological essentialism position women as “other” and sustain gender inequalities in the workplace. She argues that these three conditions continue to reproduce male power through discourses and social institutions, which constitute men and women as different and unequal. She asserts that “far from being an expression of natural differences, exclusive gender identity is the suppression of natural similarities”

(2003:238). This inevitably results in the comparison of male and female behaviour and judgement based on stereotypical male-oriented values.

Schein (1972) reported that if a woman does enter the managerial work force, she may do so at the price of personal conflict between being a woman and being a manager. Plentiful qualitative evidence suggests that many women refer to themselves in male terms, doing additional work, resisting sexualisation and distancing themselves from the label of 'mother' or 'wife' (Wajcman, 1999, Seenan, 2001). Wilson argues that women "who do achieve promotion to top management positions may have brains that are masculinised" (1994:65).

It appears therefore that women believe that in order to be successful in 'macho' management cultures they must 'manage like a man'. This implies that acting 'like a woman' is not effective in the workplace and reinforces the notion that being assertive, confident etc. is not something women do. Although women who manage 'like men' by emulating male traits are evaluated more positively than women who adopt a 'soft' female style of management (Rosen and Jerdee, 1974, Mai-Dalton et al., 1979, Dipboye, 1985) they nevertheless fail to be accepted into the 'old boy' patronage culture' (Wajcman, 1999). Grant considers that the "she-male" has negative repercussions for both the individual and the organization because "the very characteristics that are undervalued, repressed or considered unimportant in positions of power are the ones necessary to make organizations more responsive to human needs" (1988:57).

Research has also shown men who are self promoting receive a more positive response from others than men who are self-effacing. This is not the case for women however. Research by Wosinska et al concluded that "women are rewarded for their greater modesty, but this modesty may be less effective in getting recognized and promoted, as it is the people who do not mask their successes from others who are likely to be recognized in the workplace (1996:239).

Women who overtly display confidence and competence can be rejected, especially by men who see them as a threat (Singh and Vinnicombe, 2001). Women may therefore

be discouraged from self-promotion and in the process are unwittingly contributing towards their own lack of equal opportunity. The extract below displays Susan's reluctance to self-promote - at the same time as realising that she has no choice but to change if she wanted to progress within the organization;

*"My manager told me that I had to big my achievements up if I ever wanted to be promoted. She said 'Lisa's done a piece of work not nearly as good as yours but she's been going round telling everybody how good it is, making a big deal of it and that's what gets you noticed. It's alright not wanting to show off and sit in a corner being all green and sensitive, but if you don't tell anyone what you've done, it could be fantastic but no one will know. You need to be more confident and sure of yourself. Go out there and sell yourself.'"*

*[Susan, Participant, Organization A]*

Rudman discusses a series of studies by Costrich et al. (1975) which concludes that assertive women are less popular than assertive men. Similarly, self-confident women are least liked by their peers. Rudman comments that "women may be stuck in a Catch-22 in which they are damned if they do self-promote, and damned if they do not"(1998:629). The number of challenges women face in the workplace, therefore continue to grow.

## **6.5 Discrimination**

Social psychologists define discrimination "in terms of the differential treatment members of one group receive compared to another" (Jetten et al., 2013:307).

Discrimination against women is particularly relevant to this research, and Wilson states that "the psychometric testing industry is particularly adept at making sweeping claims, providing evidence for example of women's inadequacies as employees" (2010:199). The Insights Discovery model contributes to this body of evidence by its categorisation of participants into red/blue colour energies – traditional male traits; competitive, dynamic and assertive – and yellow/green colour energies; traditional female traits –

sociable, supporting and sensitive. In doing so, the model upholds and sustains traditional gender stereotypes as discussed by Heilman, who proposes that the “stereotyped-based sex discrimination” is the major cause of the lack of women in senior positions and that “current organizational practices act to support and perpetuate it” (1997:877).

These practices are entrenched in predominant male organizational cultures which consist of “hidden assumptions, tacit norms and organizational practices that promote forms of communication, views of self, approaches to conflict, images of leadership, organizational values, definitions of success and good management which are stereotypically masculine” (van Vianen and Fischer, 2002:316).

Martin and Barnard (2013) state that “the organizational culture in male-dominated occupations continues to reflect an underlying patriarchal role distribution to the detriment of female equality” which leaves women vulnerable to the “masculine managerial culture” which promotes “aggressive, domineering behaviour” which many women experience as bullying (Ozbilgin and Woodward, 2004:682).

Martin and Barnard (2013) quote Hicks (2012) who highlights “the invisible aspects of the male-dominated institutional culture that give lip service to gender empowerment strategies but continue to marginalise women”. Lahtinen and Wilson support this argument, purporting that the “rules of organizations militate against women” with structures and roles that “reflect the social worth of women” and these serve to replicate and sustain those values (1994:18). Consequently, despite many years of dedication to equal opportunities policies and attempts to eliminate gender discrimination, there is a growing argument that organizations and organizational theory are not, as we may like to believe, gender neutral. Hearn and Parking (1993) discuss gender absent assumptions which produces ‘malestream’ organizational theory. This challenges the predominant discourse which suggests female stereotypes are valuable assets in the workplace, particularly in managerial roles. Rather, “the psychological barrier to the advancement of women in management, the ‘think manager – think male’ phenomenon can foster bias against women in managerial selection, placement, promotion and training decisions” (Schein et al., 1996:2).

There are many hypotheses presented for the lack of progression by women in organizations, for example biological differences, family commitments, lack of motivation or social skills. Fox and Prilleltensky (1997) consider that these beliefs crucially ignore the social context within which men and women work. There is a general consensus that the lack of clarity in what is required in order to hold a senior level positions contributes to the barriers, with selection and advancement criteria often based on stereotypically male personality traits such as competitiveness, charisma and ambition. Resolution is generally sought by the devising of self-help solutions that will allow women to “overcome the inherent deficits that result from being female”. There are numerous sources of advice, helping women to fit in and join the ‘old boys club’; assertiveness training, women in leadership programmes, etc. The aim of these interventions is to enable them to communicate more proficiently, understand the opposite sex better and manage more skilfully. The creators of these advisory works all “accept the proposition that it is the weaknesses that women bring to the work place which obstruct their advancement, weaknesses which must be overcome if women are to succeed”(Heilman, 1997:878).

Heilman raises the issues that “many progressive measures in work organizations designed to mitigate against organizational sex bias and sex discrimination have precisely the elements necessary to exacerbate and perpetuate the process they seek to combat” (1995:19). Surprisingly resistance to such programme has emerged from the precisely the groups they were intended to help (Wilkerson, 1991, Wycliff, 1990). Affirmative action perhaps taking the form of leadership training for women, mentoring schemes, diversity training etc. all focus attention on the differences between men and women and “therefore may serve to prime gender categories, increasing their cognitive accessibility and use” (Heilman, 1995:19). An irony exists in that solutions provided to ‘fix’ discrimination are, at the same time, exacerbating the situation.

The Insights Discovery workshop is intended to help participants value diversity of opinion, understand other’s perspectives and appreciate differences. Fletcher and Jacques (1999) note that programmes instigated under the rubric of ‘valuing diversity’ have little worth and that there is no evidence that simply recognizing something as

valuable will make it add value (Fletcher and Jacques, 1999). Ridgeway (1997) argues that by highlighting differences, organizations are in fact continually reinforcing them.

The unintended negative effects result in participants categorised as red, green, blue or yellow. Certain categories are not only viewed as being less competent but also carry an associated 'stigma' deemed less deserving of holding certain positions and therefore receiving reward. This is perfectly illustrated by the example below;

*“Out of all the managers in our group I was the only one to be green. I felt very uncomfortable with it. The sub-text was that I wasn't as dynamic, ambitious or performance driven as the rest of them. Once everyone knew what I'd come out as I felt like I had an uphill challenge to prove that I was just as capable as the rest of them. It wasn't a level playing field anymore – it was like I had a handicap I had to deal with.”*

*[John, Participant, Organization C]*

This form of categorisation can on one hand bring about behaviour that over compensates or alternatively produces self-fulfilling prophecies which create precisely the behaviour others expect to see, for example “social stigma leads to low self-esteem”(Crocker et al., 1991:218). Stereotyped characterization may then become more pronounced (Heilman, Block and Lucas 1992) and the focus on personality traits results in an aggravation of stereotyping.

The idea that the Insights Discovery focuses on discussing differences and appreciating diversity of perspectives is an admirable aim, however as the colour energy categories inevitably develop as the central focus of the model, “the stereotypical attitudes that are the basis of the problem may be nourished and given new energy” (Heilman, 1995:19). Heilman asserts that interventions must be designed more thoughtfully with less emphasis on differences and distinctions. “Creating such programmes requires understanding of the conditions that give rise to and inhibit the occurrence of social categorization” (1995:19).

The personal consequences – on both men and women - of organizational programmes and processes that use categorization can be extreme. Crocker et al quote Cartwright (1950) who states that “the groups to which a person belongs serve as primary determiners of his self-esteem. To a considerable extent, personal feelings of worth depend on the social evaluation of the group with which a person is identified” (1991:440).

Crocker and Major (1989) challenge this view, creating the term “attribution ambiguity”. This occurs when an individual believes they are treated as part of a group rather than an individual and as such, interprets any personal feedback, be it positive or negative, as group feedback influenced by discrimination. Whilst this may on one level protect individuals from unnecessary degradation, it may also present unanticipated negative consequences. When an individual is unclear whether a negative outcome has resulted because of their own level of ability or because of discrimination against their social category, it may be difficult to assess when improvement is necessary and personal development is needed. In this extract, Robert clearly feels any negative comments are aimed at his label and not his behaviour. He believes that he is beyond reproach and that his colour label has vindicated his past and future behaviour;

*“Insights Discovery has helped me realise that being direct and to the point is just the way I am. Now, if people get upset because I say it like it is, I just think...ok, you’re not red so you don’t like it – that’s the way it is... tough...get over it..”*

*[Robert, Participant, Organization C]*

The social process of stereotyping takes place in a subtle and concealed ways – it remains under our radar and as such goes unnoticed covered by a “cloak of equality” (Benschop and Doorewaard, 1998). We therefore have little awareness or consciousness of the hidden discrimination that is taking place in organizations. We each want to believe we live in a world which is just and fair and “we would like to believe that formal, rational procedures and objective decision making characterize our institutions” (Wilson, 2002:18).

The denial of group based disadvantage is to some extent perpetuated by members distancing themselves from the group. They exhibit reluctance to identify themselves with or admit that they have the same traits as other disadvantaged group members which contributes to the negative stereotyping. For example managers who reject their supportive earth green colour profiles and instead choose to portray themselves as dominant fiery reds deny the opportunity for earth green traits to be recognised as positive management behaviour. The negative expectations other earth green employees have result in self-stereotyping in which they regulate their performance and aspirations based on the lack of positive role models e.g. "I could never be a manager – I'm just not red enough". Their actions justify and confirm the negative expectations held about their group and as a result, the systematic discrimination against certain categories remains vague and unchallenged.

Women in particular, are acutely aware that there are inequalities and discrimination rife in their profession and organizations. Many work in historically male domains and find themselves in a masculine culture that inhibits their development and job satisfaction. Their options are to challenge the situation or leave. Unsurprisingly, most will choose to find alternative employment (Wilson, 2002).

Our lack of awareness of the influence sex stereotypes play in our lives prevents us from challenging the taken for granted and universally shared assumptions played out every day in the workplace. As previously discussed, women are historically seen as having different traits (sensitive, supporting and caring) and capabilities which will ensure they are forever typecast and disadvantaged. "The tendency to devalue a competent woman, although not invariable appears to be more the rule than the exception" (Lott, 1985:54). This perhaps explains why so few women are successful in securing senior positions and why few women hold positions of power in organizations (Lahtinen and Wilson, 1994).

The Female FTSE Board Report 2014 claims that representation on the FTSE 100 boards currently stand at 79.3% men and 20.7% women - up from 12.5% in 2011, with only two all male boards remaining. The FTSE 250 have achieved 15.6%, up from 7.8% in 2011 - with 83 of the FTSE 250 all male boards in 2011 now having recruited one or more women onto their boards (Vinnecombe et al., 2014). The number of women on the

boards of FTSE 100 companies has exceeded 200 for the first time since the launch of the Cranfield School of Management report in 2011, however only 5 females appointed to FTSE 100 directorships in last 12 months (Vinnecombe et al., 2014).

In 2014, a poll of more than 1,500 workers found that 43% said they were bullied by their line manager and 20% bullied by a senior manager or chief executive. Almost three-quarters (73%) said the bullying they experienced was verbal including threats, while a similarly high proportion (60%) felt the bullying was social, for example being excluded, ignored and isolated. More than a third said that bullying they had experienced had continued for over a year (CIPD, 2015).

Although it could be surmised that male managers may be the perpetrators of bullying, perhaps threatened by the rising presence of women, Namie and Namie (2000) suggests that female bullies are increasingly prominent and other women are more likely to be their target. "Instead of laying the groundwork for the advancement of the sisterhood, women have joined men in the harassment of their own gender" (Brunner and Costello, 2003:1). When women do succeed in attaining senior management positions, it should not therefore be assumed that they will use their nurturing and caring qualities to help other women achieve success. On the contrary, Brunner and Costello report that "through bullying methods, women supervisors and managers may provide organizations with the underhanded behaviours that keep competent women from being noticed and promoted" (2003:1).

This result paints a picture which is in harsh contrast to the gender stereotype of women as supporting caregivers and represents "a damaging dynamic, because women who oppress other women help to maintain the existing social order in which men remain dominant and women are subordinate" (2003:3).

*"I once worked for a female manager who had been drafted in externally to lead a big project we were working on. She was certainly about as red as it gets - very different than any manager I'd seen before in the organization. She was aggressive and dominant, having stand up slanging matches in the middle of the office with other staff members – she shouted and swore which was pretty*

*shocking to most of us. Everyone noticed that women seemed to bear the brunt of her temper – the men she liked to be flirty with. It was the kind of behaviour that didn't really fit with the brand personalities we were trying so hard to promote but she seemed to get away with it because she had been brought in specially, on a big salary and the promise of a big bonus, to deliver results.*

*When I met her for the first time I thought I'd find some common ground. I'd heard she had four children so I mentioned my kids and said how hard it must have been for her – having children and being a successful woman. She laughed and said dismissively 'you wouldn't catch me changing a nappy'. I decided not to mention children again. I certainly felt she looked down at other women and was annoyed if anyone had family commitments – she started running daily update meetings at 5.00pm every night. We were all on flexi time and most people wanted to be long gone by then – especially women who had families – but no one dare say anything about it.*

*After a couple of months she arranged for an Insights Discovery workshop to be run for the team – so we could get to know each other better. It was meant to be half a day but in the end she said we could only have an hour because we were too busy to 'waste time on training'. It was a bit ridiculous considering it was her idea and because there wasn't really time to understand it properly, what it meant or how we could learn from it. She was 'in a meeting' so didn't go along herself but she did ask for a team wheel plotting all our colour energies and this was posted up on the office wall.*

*This definitely gave her ammunition to use against us. I really think she used the information to target the 'weaker' ones – in particular the more sensitive greens and yellows. A particularly vicious outburst left one girl close to tears and after that this manager referred to her as 'little miss sensitive'. I think she thought it was funny to pick on people who weren't as hard faced as her and she encouraged others to do the same. Those that came out of red seemed to fair a little better and those that were red and male became her favourites – getting opportunities and overtime not available to everyone. She was a different person with them. I noticed a few red 'wannabes' started to go outside smoking with*

*her. In fact one man who sat near me hadn't smoked for 2 years but started again so he could 'hang out' with her in the smoking area!*

*On one occasion she had a rage in a team meeting that we were all 'pathetic', no one was passionate about the project – there was only her that cared if it succeeded or failed. I spoke up and said that we were all passionate it was just that different people showed their emotion in different ways – just as we'd been told in the Insights Discovery workshop - the fiery reds and sunshine yellows might like to shout about their feelings it but the cool blues and earth greens preferred to keep their emotions to themselves. She said 'I'm the f\*\*\*ing manager and left the room!*

*There is no doubt that discrimination was going on within that project team... it wasn't even hidden. We all knew it was there but daren't speak up because she was so overpowering and aggressive.. and her managers overlooked it because they had brought her in and she was getting the results they wanted.”*  
*[Susan, Participant, Organization A]*

This is a long and complex story, however Susan's account of a bullying female manager is very pertinent. This female manager, apparently downplays her femininity to enable her to be on a level playing field with male managers. In doing so, she gives preference to red/blue male traits and undermines those with green/yellow female traits in a forceful, aggressive manner. This reflects the predominant picture of male dominant organizations.

The language of organizations is masculine and “feminine attributes are valued only in the most marginal sense” (Ely and Meyerson, 2003:109). Male leadership traits become normalised within organizations and are accepted as a blue print for future leaders to follow. Perhaps therefore, women feel forced to discard their feminine characteristics and “assume the characteristics of the dominant culture” (Brunner and Costello, 2003:2). The lack of value given to women may exacerbate the competition amongst them and perhaps because of this some feel a need to demean and degrade other women (Ely and Meyerson, 2003). It is usual that the most vulnerable members of an organization are women, generally taking up lower graded positions and therefore

receiving lower rewards than their male counterparts. This “provides the bully with the easiest prey in the competition. Thus, female bullies help limit the number of women able to challenge the existing hierarchy” (Brunner and Costello, 2003:2).

Brunner and Costello argue that male managers allow females to demonstrate these bullying behaviours toward other women because it removes them from the spotlight. Female bullies therefore “protect and preserve the male-dominated, existing structure while men are able to keep their hands clean” (2003:3). Hornstein (1996) sought to identify the differences between tough managers and those who are abusive. He established that tough managers set tough goals and consequences for not meeting standards, but abusive managers have different goals. They aim to make life miserable for their subordinates by humiliating them in front of co-workers or customers, perhaps using humour to mask harsh criticism, accusing them of dishonesty or disloyalty in an effort to provoke a reaction. Others may even demand that employees carry out unethical or improper activities, as tests, to see how far the employees are prepared to go. Hornstein concluded that bullying is tolerated because “organizations of all kinds keep a comfortable place for bosses who will do their dirty work” (1996:103).

*“I made a bit of a daft comment in a team meeting – nothing earth shattering – but my manager said ‘are you having a yellow moment or what?’ and everyone laughed. It was done a jokey way but everyone knew what it meant. I was being told I was ditzy - a stupid woman - and I felt completely humiliated. A couple of colleagues have said it to me a couple of times now and I think what’s the difference between calling me a dumb blonde and saying ‘she’s being yellow again’. It may be different words but the meaning’s the same...it’s undermining and degrading ...I doubt very much that would have been said if I was a man..”*  
*[Deborah, Participant, Organization B]*

Deborah’s story clearly indicates how the ‘neutral’ language of Insights Discovery can be used just as effectively as a bullying tool – a means of delivering hidden gender related insults. This example illustrates perfectly how the colour labels have become a

legitimate form of gender discrimination (Jetten et al., 2013:319). The language of Insights Discovery has provided yet another platform for this to occur.

Traditional, stereotypical beliefs about leadership associate masculine traits such as dominance, assertiveness and competitiveness with success (Heilman, 1995). Women therefore may feel pressured to adopt these traits when taking up leadership positions. Ellemers et al (2004) state that women feel they must distance themselves from femininity and from female subordinates by highlighting their feminine traits in a critical manner. Whilst they perceive that all other women are typically feminine, they do not identify these traits within themselves and instead perceive themselves as exceptional. “They aim to convince others that the negative group stereotype does not apply to them, successful individuals take great pains to demonstrate that they are different from other members of their group and may even try to conceal their stigmatized identity” (Ellemers and Van Laar, 2010:568).

The need to conform to the “behavioural norms of the dominant group” can easily lead to women overcompensating by adopt extremely masculine styles (Eagly et al., 1992). This double edged sword has negative effects in terms of these women being devalued by male colleagues, and also results in them being less attractive role models for other women. The findings also suggest older females showed more biased judgments of females and were more likely than men to engage in gender stereotyping. “Thus, paradoxically, in this way the very people who have successfully escaped their plight as members of a disadvantaged group may be the ones who legitimate and perpetuate the status quo in terms of overall social relations” (Ellemers et al., 2004:20).

It has been historically argued that men are perpetrators of gender discrimination and that women are their victims. However this argument was challenged by Staines et al (1973) in their study of Queen Bee Syndrome. This describes women managers that, after reaching senior positions, endorse gender stereotypes and treat other women in a degrading and critical manner, when compared to their male counterparts. Queen bees alienate themselves from other women and thus prevent more junior females from advancing through the organizational hierarchy. Such behaviour has specifically been

observed in corporate environments with a tradition of male domination and has also been shown to be more prevalent in the presence of male colleagues (Cooper, 1997). It is interesting to note that there is no male equivalent of the Queen Bee. “‘Bad behaviour’ from men in senior roles is often expected, accepted or ignored — reinforcing the assumed rightful place of men as bosses, regardless of behaviours. Men who do not support each other in the career stakes are not blamed by other men” (Mavin, 2006:13).

Women with a more traditional view of gender are more likely to exhibit this behaviour because they perceive other women as rivals and threaten their unique position (Cooper 1997). They believe that because they “ typically worked hard to achieve a position of rank ... other women should work equally as hard (Snipes et al., 1998:83). Women who have broken through the ‘glass ceiling’ actually question its existence and similarly fail to acknowledge barriers to female career advancement created by organizational discrimination, structures or processes. Instead, they blame the individual’s shortcomings for their failure to advance (Baumgartner and Schneider, 2010).

Even though the female bully may feel she has been accepted into the ‘old boys’ network, this may not be the case. Martin writes that male leaders may compliment female bullies publicly for demonstrating that “she kicks ass with the best of them” or “she’s hard as nails,” (1996,191); however Ely and Meyerson (2000) argue that aggressive, task-oriented women may be condemned and criticized in private. It “may limit the bully’s advancement thereby blocking the route for other women” (Brunner and Costello, 2003:3). The female bully inadvertently therefore helps to maintain a structure that limits the opportunities for all women, including the bully.

Johnson and Mathur-Helm’s 2011 study provides evidence that queen bees are likely to protect their territory by withholding information and support from female employees. This is not to say however that female development and advancement within organizations are solely reliant on the support and assistance of other women. The study does indicate however that “the constraints of a hierarchical and male led work culture in most organizations that could be a block to the promotion of professional women” (2011:47). Hornsey et al (2002) argue that it is the duty of group members to

criticise their own group and consider how it needs to change. Because this criticism comes from within the group it is perceived not as an attack but as constructive feedback intended to contribute to the success and wellbeing of the group. It is therefore not expected that a woman would discriminate against her own sex, leading to the practice going undetected and being particularly damaging. Thus, the critical appraisal of junior women by their senior female managers goes unchallenged because it is not recognized as a form of gender discrimination (Baron et al., 1991). As a result, the feedback is deemed more credible and persuasive than had it been given by a man (Sutton et al 2006).

Cox (1993) suggests that majority group members are threatened by minorities who join together for support. In this suppressive culture however other employees are afraid to challenge the situation and often band together to support the bully. This strengthens the position of the bully and weakens the position of other women in the organization (Namie and Namie, 2000).

Benschop and Doorewaard reveal the “hegemonic nature of the gender subtext” and state that “while gender inequalities still persist at different levels of the organization, its concealed nature prevent it from being perceived as such” (1998:802). It is essential therefore that we begin to question the stereotypical views of men and women, the organizational discourses that promote them and the social reality they produce.

Fox and Prilleltensky assert that “psychology is deeply implicated in the patriarchal control of women”. They suppose that psychology has been used to portray men as superior to women and that this premise has been used as a basis to justify the exclusion of women from many professions and opportunities. “Psychology is used to enforce normative sex roles for women and to justify and to perpetuate oppressive practices” (1997:253). It is essential, therefore, that we begin to question the use of tools which segregate and categorise and the accompanying organizational discourse and gender subtext which permeate organizational life. The “lack of social awareness within organizational research [results in] women’s voices being either mostly silent or marginalized” (Bendl, 2008:61)

## 6.6 Concluding remarks

In this chapter I have developed this phenomenological study further by elaborating on the topic of stereotypes and in particular gender stereotypes, a key theme drawn from the research data.

This chapter firstly reported some research findings, including quotes from participants to illustrate points. It inevitably involved some interpretation and conjecture in deciding what to select and how to express and order it. The aim was therefore to represent participants honestly, whilst being ever conscious of my own personal biases.

Secondly, the chapter made interpretations and linkages, relating the findings to previous research and commentary, personal experience and opinions, resulting in the development of tentative theories. The development of theories from phenomenological findings, which apply to situations beyond the participants or cases studied, needs to be done transparently in order to have validity, and therefore the aim was to guide the reader from findings to theories, showing the path taken in order to arrive at these interpretations.

I have sought to uncover the hidden outcomes of the Insights Discovery model. In order to do this, I have cast an evaluative gaze on the Insights Discovery model and challenged key assumptions about its intensions and outcomes. The examination of stereotype has allowed cultivation of the hypothesis that the model may not only encourage stereotyping but perhaps also serve to regenerate and reinforce long existing gender discrimination.

I have also discussed the possibility that psychometric tools, such as Insights Discovery, feed into organizational discourse, presented as gender neutral, but often hiding a subtext which reinforces gender distinctions.

This chapter therefore addressed and has specifically contributed to the research question;

'What are the implications and consequences for individuals and organizations of using the Insights Discovery tool?'

Chapter 7 now presents the second of three chapters using a key theme, identified from the empirical material, to analyse the data. The next chapter therefore considers the Insights Discovery model and its association with power.

## 7. Power and the Insights Discovery Model

### 7.1 Introduction

The previous chapter cast an evaluative gaze over the Insights Discovery model and challenged some key assumptions about its intentional and unintentional outcomes. Focusing on stereotyping, the chapter considered the possibility that the model not only encourages this practice, but may also serve to regenerate and reinforce long existing gender stereotypes that women have long attempted to repress. Inevitably issues of discrimination arose from this discussion and are now visible as key areas of consideration.

In this chapter I aim to consider the distinct, yet often subtle, ways power and influence emanate from the Insights Discovery model and examine their possible sources. Analysis of the findings (as described in Chapter 3) confirm that many of the issues experienced by participants can be positioned under this umbrella heading and therefore this chapter is an important addition when considering the consequences and implications of using this psychometric tool.

I aim to investigate Insights Discovery's 'je ne sais quoi' and uncover the 'extra something' that sets it apart from other psychometric tests and learning and development tools by reporting research findings, including quotes from participants to illustrate points and enrich the discussion. As in the previous chapter, this will inevitably involve some interpretation and conjecture in deciding what to select and how to express and order it. The aim is therefore, as before, to represent participants honestly, whilst being ever conscious of my own personal biases.

This chapter therefore addresses and specifically contributes to the research question;

'How can the distinctive power and influence of Insights Discovery be explained?'

It is clear from the research that the Insights Discovery arena is one in which the participants become exposed to the gaze of their organization, and also to the gaze of their colleagues and managers. Participants become the subject of public scrutiny and judgement, not only in connection with their own personality and identity, but also how they perform as managers and employees. In this chapter I will pay attention to the aspects of power and control, drawing on academic literature such as Foucault's (1977) 'panopticon' metaphor, in order to explain how HRD acts as a central organising mechanism exposing participants to the scrutiny of others.

I also intend to examine how sharing the outcomes of the Insights Discovery model can turn an inert document into a powerful force used by HRM and HRD as a means of classification and control. I will consider how examination of the individual by a psychometric tool presents a possible opportunity for discipline and correction. This chapter will also reflect on the extent to which Insights Discovery provides a vehicle for social construction to occur, considering how individuals are encouraged to reshape their essential self in a mould presumed commensurate and fitting with organizational norms.

## **7.2 HRD as an Instrument of Power and Control**

"Development is beset with contradictions" (Vince, 2014:409) and every learning and development intervention however well-intentioned is entwined with power. It can be argued that psychometric tests used in the manner of Insights Discovery, create an opportunity for individuals to be made visible and subjected to the examination and judgements not only of fellow participants but also their managers and the 'organization' as a whole. "Power is exercised by virtue of things being known and people being seen" (Foucault, 1980b:154).

The information generated by the psychometric tool therefore becomes a source of power that may be held and used by the HRD and HRM function as they see fit. Once in

existence, the Insights Discovery profile is considered to provide factual knowledge about the individual and this description is generally believed and accepted as the 'way that person is'. "Knowledge linked to power, not only assumes the authority of 'the truth' but has the power to make itself true" (Foucault, 1977:27).

Foucault's (1977) critique of society argues that the function of HRM and HRD is to establish behavioural norms against which people are measured, and against which they then measure themselves. Vince adds some positivity however, stating that "we create and collude in the webs that constrain us, yet we are also capable of artfully navigating these webs in order to make change happen" (2014:411). Organizational practices set employees within both real and imagined hierarchical relationships, making them visible to one another and subsequently subject to the constant evaluation of 'the all-seeing organizational eye'. This 'oppression by intervention' sees HRM and HRD asserting disciplinary power by dividing people into smaller, more manageable groups.

In the case of Insights Discovery, a tool intended to promote self-understanding and development, participants are divided into colour groups which each have a strong identity, informing members what they like, how they act, communicate and work best. (See the discussion on stereotyping in Chapter 6). Participants then self-discipline themselves based what they think is expected of them, how they feel "we are supposed to live" (Fendler, 2010:44). The irony is highlighted by Vince who states that "our efforts to facilitate change may well inhibit it; and our strategies to empower individuals may contribute to the establishment of forms of compliance and control" (2014:410).

Foucault (1977) emphasises the psychological impact of constant visibility. He uses the panopticon, a 17th century prison building designed by Jeremy Bentham, as a metaphor that can be used to understand how discipline acts as an apparatus of power in modern day organizations. The panopticon was constructed of a central guard tower surrounded by rings of cells. The prisoners were permanently visible and exposed to the guards in the tower, never certain of whether they were being watched or not. Never knowing when or if they were being observed, they lived in a state of constant paranoia. It was assumed that if prisoners cared about the implications of their behaviour, they would

follow the rules at all times, just in case they were being watched. Over time, prisoners developed a permanent unconscious awareness of being observed constantly and continued to act as if they were in a panopticon even when they were released. This, Foucault claims, is “the major effect of the Panopticon: to induce in the inmate a state of conscious and permanent visibility that assures the automatic functioning of power” (1977:201).

Foucault’s panopticism therefore concerns the systematic ordering and controlling of human populations through subtle and often invisible forces. He considers that this form of behaviour control is essential if we are to self-govern ourselves, without the constant surveillance and intervention of an ‘agency’ in every aspect of our lives. “It is the fact of being constantly seen, of being able always to be seen, that maintains the disciplined individual in his subjection” (1977:187).

By individualizing the subjects and placing them in a state of constant visibility, the efficiency of the organization is maximized and the function of power is guaranteed, even when there is no one actually asserting it. It is in this respect that the panopticon functions automatically and the process of surveillance continues even after the Insights Discovery workshop, as subjects fall into the ‘trap of visibility’ (Foucault, 1977) and feel they are ‘being watched’ - “this is the very ‘basis of panoptic power. It is the effect achieved through the realization that one is subject to the gaze” (Crossley, 1993: 403). The negative effects of surveillance on participants, combined with issues of stereotyping according to colour label, are clearly seen in the extract below;

*“So I came out as yellow/green and all the other managers were red and blue. I suddenly felt like they were all looking at me and questioning whether I was management material. I even began to doubt myself. I could almost hear them saying ‘she’s such an airhead, no wonder she makes a mess of things – she’s got no focus, no attention to detail..’ I felt like they were all swooping round me like vultures, constantly watching and waiting for me to trip up so they’d know I wasn’t the right person for the job.”*

*[Chloe, Participant, Organization C]*

This participant's experience of becoming aware that her peers and managers were judging her personality and work performance based on her colour label, left her feeling permanently anxious and stressed. (Garrick and Clegg, 2001, Foucault, 1977). The power of the gaze and the resulting awareness the participant had of being watched, led her to internalise her experience and become the subject of examination. "Our fears of being punished, humiliated, excluded, or hated are very real and ...such fears and anxieties frequently emerge within the classroom or other formal settings for learning" (Vince, 2014:418). This is just the first stage of the panopticon experience resulting in the individual eventually becoming self-regulating – moderating their own behaviour through the evaluation and values of others.

*"In the same way I felt they were judging me, I started to judge myself – finding faults and picking away at my self-confidence. I'm my own fiercest critic and worst enemy all rolled into one."*

*[Chloe, Participant, Organization C]*

Personality profiles can be used as a means to ascertain general ability and aptitude, potential and future career paths. The exposure created by the Insights Discovery model has a potential impact on individuals' self-image, performance and future success. Discussions about participant profiles in relation to their 'fit for purpose' in formal and informal settings, reiterate the pressure felt by participants to fit with the expectations of their managers and/or organizations.

The desire to 'fit' their role and avoid retribution, is reflected in anecdotal evidence from a participant who had attended a 'faux' Insights 'presentation' in Organization F, an organization not investigated in my research but with which I am familiar. The need to be seen as 'red' is clearly evident;

*"Organization F has launched a new management training tool called Putting People First. This has been implemented to improve our managers' interpersonal skills and how they deal with their staff.*

*Part of this training involves the trainer plotting participants on the Insights wheel by asking them a series of questions and getting them to move and stand*

*according to their answers. We were then told what 'colour' we were. This was only a very brief overview of Insights and it did not go into any depth.*

*All the Product Managers seemed as though they had to be 'Red' in order to justify their roles within the business. 100% of them came away stating they were as red as it gets – my opinion on this is people wanted to fit in and be seen as a 'Director'”*

*[Margaret, Participant, Organization F]*

The Insights Discovery model is a mode of panopticon power, which produces a written record of an individual's personality which can then be used as a basis to observe individuals and identify strengths and weaknesses. “Foucault suggests that surveillance offers the means by which deviance is identified and subject to correction“(Crossley, 1993: 402). The Insights Discovery model aligns itself to Foucault's prison by nature of the normalizing judgement made by those that review the outcomes and by the way deviations from the norm are 'punished' and individuals are expected to 'change' in order to become better citizens and to fit in with the organizational culture. The Insights Discovery tool allows examination of the subject, and the profile surfaces the nature of the 'deviance' which is then available for 'correction' either by personal development or a change of role.

*“My manager had a quiet word with me about my Insights profile – I came out as red – and he was worried that it didn't fit with my HR role. Apparently I wasn't empathetic and supportive enough. Following the workshop he'd put two and two together with some feedback he'd had and decided it wasn't the right role for me. All my successes and things I'd done well seemed to have been forgotten in light of this new and compelling information. I loved working in HR and wanted to stay – I did try to change my approach as we were told in the workshop but the label stuck. I've now been moved to a logistics role”.*

*[Dorothy, Participant, Organization C]*

The power of the Insights Discovery model to change careers and alter participants' lives is evident here. The punishment for not fitting with the organizational norms was to be moved to a more 'suitable' role befitting the participant's colour energy preference.

Although the panoptican metaphor is helpful in explaining how surveillance produces compliance, Norris and Armstrong (1999) argue that surveillance is just one of several methods that Foucault associated with disciplinary power, and its effects must be considered and understood in a bigger context. Others argue that in conceptualizing people as passive and compliant, panopticism fails to acknowledge their ability to resist the 'gaze' (Lyon, 2006) stating that surveillance is not always guaranteed to produce 'docile bodies'. de Certeau (1984) accuses Foucault of underestimating the power of human ingenuity and erring on the side of determinism, as does Newton (1998) who asserts that Foucault assumptions appear to strip employees of any capacity for agency. Barratt challenges these arguments however, stating that "Foucault's subject of power is always a 'smart animal' with a body and a brain, capable of figurative and imaginative thought, that has also acquired general capacities for independent thought, a mind of its own" (2003:1077). William, perhaps because of his longevity within the Organization E, was happy to resist the pressure to change;

*"Well, I've done ok for 30 odd years so I'm not changing now? I'm the same with everyone, so no one could ever accuse me of being inconsistent."*

*[William, Participant, Organization E]*

As an enthusiastic, newly trained Insights Discovery practitioner, resistant participants who were not 'docile bodies' and who did not accept the benefits of the model without question were viewed as a challenge, a 'horse to be broken'. In this scenario the power firmly rested in the hands of the practitioner – the goal was to help them see the error of their ways, be enlightened and 'born again' into a new way of being. This practice has been frequently and substantially challenged throughout this research, not least because the self-directed learning we aspire to, has autonomy at its heart. Participants therefore have the ability and the right to choose what, when and how they learn, which may not fit with the 'one-size-fits-all' nature of the Insights Discovery intervention.

The balance of power between facilitator and participants has therefore shifted from the traditional classroom relationship, where the teacher holds the knowledge and deigns to share that knowledge with the student. The idea that "the learner must submit

themselves to the teaching game and participate” (Walker, 2000:10) was a view I had previously held about the Insights Discovery model. “Students must acknowledge and submit themselves to the truth in order for learning to occur” (Paffenroth, 2008:21). It is now recognised however that the role of the teacher is to “assist their students in realizing their own truth” (2008:10) and that ‘truth’ will be different depending on the individual and their experience. “It should also make us pause over many other seemingly good or inoffensive motivations. I am in the classroom to serve and to further truth, not myself or my career.. nor am I there to make them feel good (or bad) nor to make them act in certain ways” (2008:11).

The power of the facilitator is therefore about encouraging self-reflection rather than fundamentally changing the way that individuals think and behave and forcing them into preconceived boxes. However, even this role “raises questions about the moral authority of the tutor to encourage students to enter those private, possibly dark and uncomfortable, places of emotion, feeling and attitude on the basis that this is in some way ‘good for them’” (Holden and Griggs, 2011:485).

The pressures and ethical challenges I have personally faced as an Insights Discovery practitioner are discussed further in Chapter 9.

Although Foucault’s work does not specifically refer to personality profiling, he asserts that there are no universals and his entire life work on sexuality, power and deviation seeks fundamentally to challenge labelling, categorising and pigeonholing. His studies on identity and social conditioning are therefore particularly applicable to the research questions. The Insights Discovery profile, viewed from a Foucaultian perspective, could therefore be said to be predominantly about identity shaping rather than a medium for communicating information about self.

### 7.3 The power of sharing

A Foucaultian perspective on psychometric profiling, may therefore consider that the key factor which transforms the Insights Discovery model from a passive to a dynamic tool is the act of sharing. From a facilitator view point the Insights evaluator is completed individually online, test results are confidential and no profiles are ever disclosed to a third party, however participants are actively encouraged to share colour preference results within the workshop and to share all or part of their profiles with their teams and managers after the event.

Sharing adds immense power to the Insights Discovery profiles. Once the information is in the public domain, the power of the participant is diminished and instead those who read it take control in respect of how the information is interpreted and used. In the case of Organization B, participants have little choice in the matter, with profiles routinely stored on a shared drive which everyone has access to.

In the case of the 'faux' Insights presentation at Organization F, the normal rules of completing the Insights evaluator on line were not applied and instead participants were forced to answer questions publically during the session to determine their colour energy preference. The experiences of two participants are quoted here. Both show upset at being publically labelled and categorised;

*"One particular element that was unethical in my opinion is the fact that large groups of people undertook the insights discovery at the same time, in the same room. There were about 10 people per group, but then there have been in excess of 20 groups taking the course.*

*I found it unethical that results were shared with others. The groups were all asked questions at the same time, in front of their peers. This, in my opinion, does not develop the right climate for honest answers. Doing something like this needs to be undertaken individually without others around who can influence selections." [David, Participant, Organization F]*

*"Overall I feel the use of Insights within Organization F has been a big mistake. We have not had the model fully explained to us, we have not received profiles.*

*It has not given people true reflections of what they are like. There have been no follow ups, no reports produced, and no guidance into what the different colours like/dislike, how they like to learn etc. Instead it has been used as a tool to segment people and show superiority.”*

*[Margaret, Participant, Organization F]*

Sharing is fundamental to the Insights Discovery model, however sharing profile content is not simply a neutral exchange of information. Generally, in the presence of the group, manager or team, participants share self-selected content transparently and visibly. The act of sharing in the group is a performance – a bonding experience. Our innate desire to share and communicate, as social beings, may contribute to the power of the profile and the workshops. In fact, studies of conversations show that “30-40% of everyday speech is used to relay information to others about one’s private experiences” (Tamir and Mitchell, 2012: 8038). Researchers from Harvard University Social Cognitive and Affective Neuroscience Lab utilised functional magnetic resonance imaging to track changes in blood flow in the brain to see if talking about self would increase neural activity in areas of the brain associated with reward and motivation. The results showed that discussing self may be inherently pleasurable and intrinsically rewarding, in the same way as food and sex.

Insights Discovery’s ‘virtual panopticon’ has no specific guards and prisoners. However in the workshop arena, participants find themselves, observing and judging each other, effectively playing the dual role of both guards and prisoners. There is a self-selective nature to the sharing of content during Insights Discovery workshops. Just as the model refers to the ‘conscious persona’, the mask we wear as actors on the stage of our job roles; individuals, knowing they are being watched by their peers, modify their selection of which parts of their profile to share, with a view to either shocking or impressing them. Participants may or may not do this intentionally, but all shared content has the subtext: This is what it says about me. This is me. David’s story below shows the enthusiasm with which some participants intentionally ‘grabbed’ a red label and shared it with colleagues;

*“When people had been on this course, they came back into the office and bragged about how they were ‘Red’. They even competed on how ‘Red’ they were as though the more red you were; the better you were as a person. Having undertaken a full Insights appraisal, I can highlight certain qualities in individuals and feel I could roughly know what individuals would be on the wheel. However there were individuals who undertook the Insights plotting and to me clearly rigged the results so that they would be red, and would fit in with the masses. One individual is to me as sunshine yellow as they come. They are not decisive, fiery, or competitive, but judging by how red they came out as, you would expect them to be really assertive and confident – not at all like their true personality.”*  
*[David, Participant, Organization F]*

Although some might privately question the validity of shared information, the audience tends to consume it and honour the identity that the individual creates. For some, sharing is solely a matter of self-affirmation and self-creation. Individuals speak about their personal preferences, and enjoy confirmation from the group, thereby satisfying a deep psychological need for recognition.

For those using the Insights Discovery model in the way that it is intended, the tendency is for participants to accept the profile as ‘true’ and assume that the profile ‘is’ the person and the person ‘is’ their profile. This is exacerbated by the confirmatory rhetoric surrounding the accuracy of the test. “It sounds just like me!” “I thought someone had been talking to my mum!” (Insights®, 2012). These comments are echoed by participants in the workshop and it is unheard of in my experience for anyone to challenge more than one or two phrases of their profile.

The Insights Discovery model skilfully and slickly manages any hint of dissent, being simultaneously and paradoxically simple yet ambiguous. Facilitators tell participants that the accuracy of the profile is solely reliant on the answers they gave to the questions asked – placing the responsibility of any seemingly inaccurate statements squarely on participants’ shoulders. It is also made very clear that it is the participants’ task to reflect on the profile and consider why it has produced the results it has. There is therefore

scope within the model for multiple and blurred interpretations. The Insights Discovery model is cleverly constructed in such a way that it is never wrong – if you agree with your profile then it is down to the genius of the model and if you disagree, you are to blame for answering the questions inaccurately.

It seems that once belief in the model is constructed, there is a natural tendency to reject contradictory evidence despite it being entirely logical and rational – perhaps example of confirmation bias coming into play.

Turnbull (2001) describe the ways in which some managers come to internalize the values and beliefs transmitted via development programmes likening this to the kind of enculturation processes one might encounter within a religious sect (Mabey and Finch-Lees, 2008). Ackers and Preston raise ethical concerns about the rights of participants on programmes that may involve an “emotional experience to remould individual personality and hence corporate culture in a way that mimics the religious conversion process” (1997:677). They raise awareness to the fact that “the majority of religious conversions are based on a freely chosen voluntary commitment that infuses the whole of the person’s life with a new meaning”. This is in contrast to development programmes which consist of “involuntary and temporary compliance to an organization”(1997:679). Ackers suggests that whilst the ethics of ‘personality reshaping’ are distasteful and disturbing to some “the managerial exponents of ‘enlightened business self-interest’ still insist that the corporation cannot afford not to mould culture and people, and that society needs it to have its way” (Ackers, 1996:695).

Insights Discovery workshops appear to provide organizations with both the opportunity and the means to mould culture and people, offering a form of social cohesion with “a short, but intense, personal experience designed to reforge the individual..personality and bond the .. team together” (Ackers and Preston, 1997:678). This suggestion is accepted in a fatalistic sense by Smith and Johnson, “In classic utilitarian terms, the end justifies the means, as the individual is sacrificed for the business organization, in the train of the struggle for ever higher economic utility” (1996:5).

It is clear from my research that the enthusiasm with which participants bought into the 'conversion process' varied amongst organizations. Although the actual content of the Insights Discovery workshops remained constant, one major distinction was the fact that some had specifically requested Insights Discovery as a standalone event (Organization A and Organization B) and others had essentially been 'given the tool' as part of a larger management development package (Organization C, Organization D and Organization E). These contextual differences are fully discussed in Chapter 5 and appear to have direct correlation with 'conversion rates' and the extent to which the model became embedded in the organization.

*"It was like having the wool removed from my eyes! A real eureka moment! I knew what I needed to do and felt fired up to do it!"*

*[Michael, Participant, Organization B]*

Ackers and Preston (1997) refer to the 'grand awakening' and 'spiritual rebirth' and make parallels between the expectations of these forms of learning interventions and Paul's 'road to Damascus' moment.

*"So rid of your old self, which made you live as you used to – the old self that was being destroyed by its deceitful desires. Your hearts and minds must be made completely new, and you must put on the new self, which is created in God's likeness and reveals itself in the true life that is upright and holy [Acts 9 (1-9)]"*

This extreme transformation process is apparent in the Insights Discovery model. Its aim of building stronger relationships and strengthening bonds with those people we previously found it difficult to connect with bears striking similarity to religious conversion which is "about repairing or recasting personal relationships, either by breaking with the past affiliations...or by healing old personal scars and rifts" (Ackers and Preston, 1997:681).

Learning interventions that cause dramatic personal revelations can be viewed as powerful, immensely rewarding, sparking major life changing events. Or, on the other hand, as Thompson (1980) dramatically claims, they may be regarded as "a brutal

smashing of human personality through a ritualized form of psychic masturbation” (Thompson, 1980). Ackers and Preston judge that HRD programmes have “entered an emotional and existential terrain which was previously the province of religion, employing a rhetoric that appeals to similar ideals of self-discovery, faith and commitment”. They highlight the ethical implications of “asking managers to participate in activities that are clearly designed to challenge the individual as a person as well as a manager” (1997:689). These ethical questions are discussed further in Chapter 2.

Whilst the Insights Discovery model does not put participants through the same radical challenges of some extreme management development programmes, there is a process of ‘peeling back the layers’ and stepping outside the comfort zone in order to shape personality and culture, which can be an emotional challenge for some.

*“I got very emotional about the whole thing. I felt vulnerable and unbelievably sensitive about the feedback I got from other people – some of which was good, but some I thought was bad. It really upset me and I thought a lot about it afterwards.”*

*[Jessica, Participant, Organization D]*

For Organization C, Organization D and Organization E, the model was predominantly seen as just another tool used on the programme and did not spread beyond the classroom in any wider sense. Even though Senior Managers were fervently supportive of the management development programme as a whole, their lack of engagement with the tool was noticeable.

It is interesting to note that both Organization A and Organization B, instigated use of the model initially in a paternalistic and authoritarian manner, however because the managers concerned were respected and assumed to know what was best for employees, there appeared to be little resentment or animosity amongst employees. Rather, participants happily took part in a three hour ‘short burst’ opportunity to become immersed in the model and concentrate and focus on the specific learning points. The model therefore became engrained in the organizational discourse and an accepted part of the culture. This was opposed to delivery as part of a larger programme

when it would appear that the message became diluted and overshadowed by other demands and expectations. This is illustrated by Richard;

*“The Insights model was good and it did make me think. However because it happened on day one and there was so much other stuff going on in the programme, it did kind of get lost in amongst everything else.”*

*[Richard, Participant, Organization E]*

It would perhaps have been thought that returning to the Insights Discovery model after the event in order to write a reflective assignment would have served to embed the tool and prompt its use in a longer term, more meaningful way; however this was not the case.

It is clear that the personal information contained with the Insights Discovery profile is a source of power once shared. Once in the public domain, the truth or accuracy of the profile becomes inconsequential as others use and interpret it in a variety of ways to suit their goals and objectives. When allowed and encouraged, this power quickly infiltrates organizational discourse and effortlessly becomes an embedded part of work life.

## **7.4 Evaluation and results**

Interest and enthusiasm by the commissioning manager therefore appears important when implementing what is effectively a ‘change agenda’. In all cases, “management development may have far more to do with a need for them and their company to be seen as progressive, reputable and enlightened than with any desire to directly impact the bottom line” (Mabey and Finch-Lees, 2008:236). This perhaps explains why none of the organizations had consciously or systematically engaged in any formal evaluation, and had instead relied upon rhetoric to evidence success. In most cases using positive storytelling to sell the benefits and perpetuate use of the model:

*“Insights Discovery is a great tool. It has been a huge success, everyone is keen to use it and the feedback is always positive.”*

*[Ann, HRD Manager, Organization A]*

*“.. it’s doing its job. The staff love it and we are learning more about each other and what makes us tick”*

*[Stephen, Finance Director and Commissioner, Organization B]*

*“One of the supervisors had to deal with a situation that had the potential to be tricky and maybe even confrontational. He asked me to go along as an HR advisor but I didn’t need to get involved. There was a marked change in the way he handled the situation – he was sensitive and thoughtful, really empathetic – something that he would never have been before Insights Discovery. I don’t think he’d realised how well he’d done and how much his approach had changed.”*

*[Julie, HR Advisor, Organization E]*

Evaluation of any sort is fraught with difficulties – managing meaning, opinion and bias; perhaps this explains why the investigated organizations appear to be satisfied to rely on surface level, sparse, objective and anecdotal feedback to justify continued use of the model. Of course, participants who have been specially selected to attend the workshop are unlikely to openly criticize it - especially in the case of Organization E and Organization C when the tool was used as part of a management development programme which gave attendees an elitist status. This idea may have been abhorrent to many of the Organization E supervisors who wanted to remain ‘one of the lads’, however the fact that they had been singled out to take part in ‘special development activities’ suggested they were not ‘just workers’ any more but had gained superior standing. It is also unlikely that participants will spend time reflecting on the model’s weaknesses when they are in the midst of experiencing a rush of enthusiasm and positivity.

Tales of personal success appear to be numerous. However, the link between individual and organizational learning is tenuous. Organizational learning may not be an automatic

outcome simply because individual learning has occurred (Ikehara, 1999, Wang and Ahmed, 2003). The relationship between the individual and the organization is complex in nature (Antonacopoulou, 2006). Individual employees may make meaning and sense of the learning intervention, but the degree to which this develops and feeds into long term impact is dictated by the extent and quality of organizational engagement and interaction with an individual. Reinforcement is a key requirement to ensure the behaviour becomes embedded (Gold et al., 2010), however, it is more likely that “they will learn to sing the hymns but fast forget the words” (Ackers and Preston, 1997:698). As with many learning interventions, content can be quickly forgotten as the priorities of work take over;

*“I liked the Insights Discovery model and the way it was about me. Yes, it did make me think about how I could talk to people differently.. but the thing is that as soon as I got back after the course I had to hit the ground running, trying to catch up with everything I’d missed. It soon got forgotten then – although I would like to read the profile through again when I get time.”*

*[Richard, Participant, Organization E]*

It is interesting to consider why the lack of formal evaluation exists and why organizations pay so little attention to the outcomes of such a sizeable investment. Perhaps the model, as quoted in the promotional literature, “spreads enthusiastically” across organizations, carrying everyone to a place where they simply do not care if it does anything more than make them feel good. Perhaps organizations believe the promotional quotes of other satisfied customers; “my CFO told me it was the best money he had EVER invested personally or professionally and insisted that he hand-deliver the cheque”(Insights®, 2012). Perhaps the organization chooses not to evaluate its effectiveness as an independent entity, seeing the intervention as part of a larger process of corporate indoctrination, drawing participants into a unitarist society where teams work together for mutual goals, and there are no conflicts of interests between managers and employees (Leat, 2001).

It was also apparent that, to some, the very existence of the tool within the organization was a positive. It represented a visible sign that the organization was learning and

improving - a 'box was ticked' - a demonstration that employees were valued and considered worth the investment. However, whilst a learning organization is seen as a competitive advantage by some academics (Kapp, 1999, Senge, 1994), Coffield exposes 'the learning organization' as a 'mythical beast' requiring "total commitment from all workers, who in return are likely to be treated as totally expendable by footloose employers" (1999: 489).

In Organization A and Organization B, the model was used as a means of promoting the progressive and enlightened face of the organization and also as a way to change the way people thought about themselves and others. Ackers and Preston have questioned the "sincerity of senior management in meddling with employees' inner lives and promising them liberation at work" (1997:695). However, in the context of Organization A and Organization B, the model's values appeared to quickly become internalized and normalized within the organization. Change champions served to promote new behaviours and ways of thinking, encouraging others to do likewise and building a critical mass of followers. One participant reported notable transformation in their thinking and behaviour;

*"It was amazing, a real eye opener - I realised that being the same with everyone wasn't as good as I thought. Having some time out to reflect really made me think about how I came across to other people."*

*[Mark, Participant, Organization A]*

O'Donnell et al (2006) temper this positive view by recounting how employees, under false illusion of empowerment can become 'addictively obsessed' with the notion of self-development. They link this skewed evaluation of 'any learning is good', with a 'psychologically warped value system' that seeks to transfer the entire burden of maintaining employability on to the employee. O'Donnell et al (2006) creates a vivid image of line managers as development 'dealers' who have the power to provide or withhold the 'HRD fix' to addicted employees (Mabey and Finch-Lees, 2008:131). Perhaps the need for an 'HRD fix', a desire to belong or take part in the 'rite of passage' reveals why non-participants reported optimistically on the model's appeal. Most

expressed strong interest in seeing their profile so that they could join in discussions with colleagues.

*“I’m new to the business and when everyone talks about their colour energies I feel a bit left out. Everyone’s been guessing what I’ll be so I can’t wait to see what colour I am.”*

*[Luke, Non-participant, Organization A]*

*“I’ve been with the company 3 years but haven’t been through the model yet. I’ve just moved into a new job with new people and I think having it done will help me and know where I fit in with the team.”*

*[Paul, Non-participant, Organization B]*

*“So far I’ve been left out of the ‘Insights Club’.”*

*[Meg, Non-participant, Organization C]*

When the model was used in 1:1 coaching with individuals, impact was varied. Some participants reported interest, but leading to no perceived long term change. Group activity however appears to have added greater value, perhaps because “.. no matter how imperfect that contact may be...for the vast majority of us, a full and rewarding life is to be found in the company of others” (Newman, 2014:347). Functional benefits were noted when teams attended the workshop together and used it as an opportunity to find out more about one another and understand different perspectives.

Participants report that the prompt for self-reflection provided by the Insights Discovery model, is one of the most advantageous outcomes. Participants have readily available access to a wide range of personal, relevant information and therefore the experience may be meaningful. It must be considered however that “the very nature of the reflection process is personal, individually focused, possibly sensitive” (Holden and Griggs, 2011:485) and as such may perhaps be an uncomfortable experience. Self-reflection is not simply a means to achieving better performance or change but rather to question the assumptions that lie hidden beneath the surface.

The findings of Hixon and Swann “suggest that self-reflection may be an essential ingredient in self-knowledge”(1993:41) and “thinking about self may sometimes foster self-insight” (1993:35). Foucault (1996) also stated that reflection had the potential to be empowering, acting as a shield against attempted third party remoulding, allowing a chosen manner of being to be maintained even in the face of forces seeking to change and mould. Critical reflection therefore has emancipatory power in that it has the potential to free the individual from inner constructs and challenge the status quo. Kolb observes that “the greatest challenge to the development of knowledge is the comfort of dogmatism – the security provided by unquestioned confidence in a statement of truth, of in a method of achieving truth” (2015:162).

There are other opposing views on the benefits of self-reflection however. Some claim that trying to remember something may lead to inaccuracies and memory contamination. Others suppose that reflection can sometimes actually undermine performance (Schooler and Engstler-Schooler, 1990, Schooler et al., 1988). Nisbett and Wilson (1977) report that when asked to explain their actions, people relied on shared theories about what caused their behaviour rather than the actual causes . “Thinking can undermine the relation between people’s attitudes and behaviours” (Millar and Tesser, 1986, Millar and Tesser, 1989, Wilson and Dunn, 1986). Therefore, whilst a small amount of reflection may be positive, focusing on why we are the way we are for very long periods of time may have the opposite effect.

When managers took part in the sessions, it generally allowed interaction and opportunities for honest, constructive feedback. This is not always the case however and this quote represents an interesting occasion when a manager attended with an apparent aim to get to know her team more and develop relationships. She then proceeded to follow her own agenda, dominating the discussions, constantly challenging and digressing from the purpose of the workshop. This had a profoundly negative effect on the team and participants:

*“We were hoping she didn’t come and we were right to think that way. She spoke over everyone, full of her own self-importance. We couldn’t be ourselves and her being there was inhibiting – she got in the way of our learning. You could visibly*

*see her gloating when she came out red. Basically it gave her a crown and a robe and in her eyes it totally validated her role and management style.”*

*[Linda, Participant, Organization B]*

The open sharing of personalised personality profiles opens employees to public scrutiny and judgement. Careers may be made or broken on the back of this powerful document. Once exposed in this way, it may be difficult for an employee to shake off their label and the possible long term implications for employees are unknown. After discovering their colour preference, many participants felt that they were incapable of carrying out certain tasks and therefore limited to what they could achieve in the future.

*“I’m yellow, so it means I just can’t handle detail.”*

*[Becky, Participant, Organization D]*

The profiles are clearly being used by some as an excuse why they should not to attempt some tasks. They appear to be erecting their own barriers. Others seem to be using their profiles to excuse their behaviour and justify why they cannot help themselves acting in a particular way. If people believe and feel controlled by their label, their fate becomes a self-fulfilling prophecy (Merton, 1948) as illustrated by the exert below;

*“I’ve spoken to a few people who have done Insights and some of them seem to be using it as a bit of a joke and an excuse for not wanting to work with other people or adapt their working styles.”*

*[Joanne, Participant, Organization C]*

Our confirmation bias - the ‘cognitive confirmation effect’ (Kelley, 1950) means we gather selective evidence about others that fits with their label and treat them accordingly. We tend to eliminate or ignore information about people’s characteristics and behaviour that does not fit. “After a target is assigned to a particular category, such as a racial group, general attitudes toward that group create expectancies of positive or negative characteristics that can bias perception” (Bodenhausen and Hugenberg, 2009). As soon as a belief or expectation is formed, the observer notices new information that confirms their belief and discounts contrary evidence (Marks and Kammann, 1980).

Some interviewees mentioned that their profile was a hindrance, a stigma:

*“I’m embarrassed to be blue – you’ve got to be strong, speaking out and making decisions here, not quiet and standoffish”*

*[Joanne, Participant, Organization C]*

This person felt backed into a corner and unable to change her label. The Pygmalion effect, (Rosenthal and Jacobson, 1968) - “the self-fulfilling nature of interpersonal expectations” (Rosenthal, 1987) ensures that the label becomes a self-fulfilling prophecy.

However, when profiles are shared without self-selection and opportunity for self-editing the impact is very different. During the course of my research I discovered that Organization B had made it their custom for participants to share full profiles publically on their internal intranet for everyone to see. The Finance Director, who was the instigator of the programme, had ensured this had become common practice within the organization. Although the results remain the property of the participant, the organization’s financial investment appeared to allow the business to have ultimate control of the knowledge. Pressure was consciously or unconsciously exerted to make sure the sharing happened and given the power relationship between employer and employee, the individuals had very little choice but to comply.

It is clearly not easy for employees to form a resistance against an increasingly intrusive HRM and HRD function. This is especially so when some organizational leaders assume it is their right to control and change workers’ behaviour. It is questionable, therefore, whether it is even possible for employees to develop strategies to help retain a semblance of individual anonymity and privacy. Some workers appear to assume that they should just surrender to the power that endeavours to control them, adapting submissively and accepting that the workplace is increasingly monitored – “it’s just the way things are”. Andrea tells of her experience of a director who fervently backed Insights Discovery and used his power and influence to ensure it was not forgotten;

*“If a director hadn’t been involved in this it would have been forgotten by now for sure. Because he has been behind it, using it at different team events, encouraging us to share our preferences by putting them on a shared drive, posters on our doors, colour cards on our desk etc. it has made it into a big deal. Because we’re all using it, it’s becoming just a normal part of the way we work.”*  
*[Andrea, Participant, Organization B]*

Ashton’s Model of Management Development Steps (Ashton et al., 1975) supports the idea that the degree of commitment from senior and middle managers relates directly to the perceived success of the management development activity. It is certainly evident that the involvement of those who held ‘power’ within the organization added pressure to ‘do something’ after the event, in this case sharing personal information. Ackers explains that “the ecstatic experience soon fades, once managers return to mundane realities... Evangelical religion counters ‘backsliding’ and ‘routinization’ by a continuous round of ‘revivals’ to restore the ebbing spirits” (1997:697). This may explain how, in this case, follow up action after the event appears to have been successful in maintaining a raised awareness of the model.

From a unitarist perspective, there is a lack of realization that power inequalities exist between employers and employees, which will generate diverse kinds of conflicts (Kessler and Purcell, 2003). In this instance, managers exert greater power over their employees in determining work practices e.g. encouraging sharing of personal information. Instead of the employees using their own power, they accept management decisions and submit to the power of more senior roles. Ackers cautions that “fears have been voiced already that, as big business aspires to mould organizational culture, it will seek to control employees in ways that violate western liberal values such as freedom of conscience and employee rights, often with the expectation that people will submit happily to this” (Ackers and Preston, 1997:688). Willmott similarly describes the totalitarian control of organizational practices as “a system of beliefs and rewards” that “invites employees to suspend doubt in the good sense of subjugating themselves to an authority of the core corporate values” (1993:529).

The Abilene Paradox views control from another perspective, this time not considering organizational power, but the potential negative effect of 'group tyranny'. "The loss of the individual's distinctiveness in a group, and the impact of conformity pressures on individual behaviour in organizations can prevent individuals acting in their own or others best interests" (Harvey, 1974).

*"I actually wasn't interested in going to the workshop. I don't like all that talking about feelings etc. I also didn't want to be in a position of having to share personal information. Information about me is just that – personal... Anyway because everyone else in my team was going I felt like I had to. Not only did I have to go along but I also ended up having to read out and share things from my profile I didn't want. I wonder what would have happened if I'd have said no, I'm not doing it? Probably everyone would have looked at me and thought I was a weirdo and work relations would be strained and awkward after that."*

*[Joseph, Participant, Organization C]*

Joseph's reservations are justified, as when profiles are shared remotely, there is no right of reply, no opportunity to unpick the underlying complexity and enter into meaningful dialogue. Anyone can read anyone else's report and make judgements which go unchallenged. It is argued that even if an individual initially agrees or disagrees with another's label, once we accept the validity of the model, our selective attention means we see information that confirms this view.

The overwhelming consensus as to the accuracy of the personal profiles appears to ratify the model and signify its success as a development tool. However the research carried out by Forer, known as the Barum Effect (Forer, 1949), shows that this is not a significant measure. Participants' accuracy of judgement is questionable as subjective validation and self-serving bias comes into play. The willing acceptance of the profile and the confirmatory remarks, such as "have you been stalking me" serve only to help the label stick.

By making profiles visible to the 'organizational crowd', the Insights Discovery model exposes participants to the 'virtual panopticon'. Following the workshop, an individual's performance may be more closely monitored and assessed by senior managers; however individual behaviour will be most directly affected by the surveillance of people with whom they share their profile – colleagues and peers. The negative effects of surveillance is again seen in Margaret's experience;

*"Since the presentation, those who have been on it have now taken it upon themselves to judge and box all those in the office with what colour they are. Considering they have not done the complete Insights Discovery programme, they have come back experts on the topic, and are able to pick people out instantly. There have also been some jokes made towards those who were not red. For example, a guy who sits near me in the office was found to be a blue. All the other managers now make a joke of them being a blue and it clearly gets to the individual."*

*[Margaret, Participant, Organization F]*

It is clear therefore that the power of the Insights Discovery model is exacerbated not only by the sharing of personal information with colleagues, but when that process is supported by senior managers. The commitment of those who are able to influence others to share and use the model can dictate the extent and the level of integration within the organization. Sufficient enthusiasm from senior level managers can negate the need for evaluation of any sort and ensure infiltration occurs at all levels without question or challenge.

## **7.5 HRD as a system of classification and control**

Historically, the personnel function was viewed as a supportive role, championing the rights of the workforce and promoting the human element of the organization. The Foucauldian approach highlights the departure of HRM and HRD from this traditional position, taking the view that "HRM provides measurement of both physical and

subjective dimensions of labor offering a technology that renders individuals and their behavior predictable and calculable" (Townley, 1993:526). Hacking describes HRM as "great web of bureaucracy" that involves "endless ways to count and classify people" (1986:34). Foucault's "panopticon thesis encourages the view that far from the idealized images of autonomy and self-management, human resource practices are implicated in the organization of an increasingly disciplined, even totalitarian system of control" (Barrett, 2003:1074).

The role of HRM and HRD in creating power relations and imbalance, "naturalizing and privileging hierarchy, power imbalance and individualism (Townley, 1994), of enforcing a particular regime of truth on the organization of work" is widely acknowledged by Foucault's followers (Barrett, 2003:1072). However power in HRM and HRD should not be perceived as solely repressive or negative (Trehan, 2004). Power is a function for knowing and Barrett states that "HRM not only contributes to the classification and partitioning of subjects but also can be understood as supplying much of the underpinning architecture for the inspection, inscription, comparison, judgement and correction of the subject at work" (2003:1072).

Practices such as appraisal, performance management, job evaluation, mentoring and development, have become increasingly the framework for examination of the individual specifically with regard to their 'governmentality' (Townley, 1994, Du Gay, 1996, Barrett, 2003). Governmentality being the way in which activities and procedures facilitate the ordering, defining and regulating of human activity, thus restricting other ways of being.

The need for organizations to 'know' employees is recognised by Garland who explains that "the successful control of an object . . . requires a degree of understanding of its forces, its reactions, its strengths and weaknesses. The more it is known the more controllable it becomes" (1987:853). This view is confirmed by Townley states that "the components of the individual, whatever they may be, personality, attitudes, skill, and so on, must be calculated, assessed, and judged" (1993:533).

The panopticon metaphor discussed earlier in this chapter, allowed Foucault to explore the power/knowledge concept and systems of social control. He considers that power and knowledge come from observing others and the result of this surveillance is acceptance of regulations and normalization stemming from the threat of discipline. Acceptable and desired behaviour is achieved not through total surveillance, but by panoptic discipline and inducing a workforce to conform by the internalization of this reality.

The predominant functionalist discourse surrounding HRM and HRD has resulted in their taken for granted practices, which are in effect "a series of categories, selection, appraisal, training, and so forth, [becoming] so familiar that they are not seen as a "way of ordering" (Townley, 1993:519).

The construction of knowledge in HRM and HRD calls for "effective instruments for the formation and accumulation of knowledge-methods of observation, techniques of registration, procedures for investigation and research, apparatuses of control" (Foucault, 1980b:102). Classification systems therefore, sold as tools to simplify analysis of the workforce and aid management and control, become inextricably linked to disciplinary procedures. Psychometric tools are one mode of classification, ordering, and distribution, which generate a body of knowledge which inevitably objectifies participants. Insights Discovery is therefore another process "through which objects are rendered amenable to intervention and regulation by being formulated in a particular conceptual way" (Townley, 1993:520).

The HRD arena promotes prescribed ways of being, whilst at the same time marginalizing others. This body of thinking about HRD aligns itself with Foucault (1977), as we become aware of organizational learning and development as a subtle, pervasive process which becomes embedded in employee psyche as normalised practice. Followers of Foucault have therefore concentrated their research on the disciplinary power of HRM practices and techniques, concluding that the aim is to create order and control via knowledge generation (Townley, 1993, 1994).

HRM and HRD can be regarded “as a configuration of subjectifying practices, in which the subject at work plays a more active role in his or her own subjection, in which the individual effects by his or her own means or with the help of others a certain number of operations on their own bodies” (Barrett, 2003:1073) .

Foucault (1980a) compares HRD practices such as self-development activities, appraisal, and mentoring to the religious confessional (Townley, 1993). These power infused activities require the employee “in the presence of an authority figure to reflect on his or her own conduct, feelings and aspirations with the aim of inducing corrective effects or self-transformation” (Barrett, 2003:1073). “Diverse forces shape and impact the subjectivity of individuals at work” (2003:1074), seeking to reconstruct and reform their identity. In Willmott’s view, the clever, yet alarming factor about organizational culture is that it “endeavours to secure control by managing the impression of respecting the distinctiveness and individuality of each employee” (1993:526) whilst at the same time putting pressure on employees to engage in the latest fad of HRD initiatives.

The power of the observer comes from the knowledge accumulated from observations. The more the observer observes, the more powerful they becomes. Knowledge and power reinforce each other. Foucault (1977) says that "by being combined and generalized, they attained a level at which the formation of knowledge and the increase in power regularly reinforce one another in a circular process" .

In general employees “live their lives in a constant movement across different practices and contexts that subjectify them in different ways” (Rose, 1996:38). We are embedded in power relations and entwined with one another in innumerable ways (Foucault, 1982) which may result in contradictions, tensions and conflict. The resultant internal tensions and conflicts this causes, are illustrated in Carol’s comments below;

*“I have a senior role with a lot of responsibility. I am proud of what I do and I think I am respected within the organization. In the context of Insights Discovery I came out as green - someone who is passive, not very driven and results focussed. I feel like this has caused tension between the dynamic manager I*

*thought I was and the meek and mild person I really am inside. It's made me question a lot and I feel a bit like a fake now."*

*[Carol, Participant, Organization D]*

Foucault claimed that "although elements are part of a familiar landscape, they are not 'natural' or part of a naturally existing order" (Townley, 1993:519). He states that "what counts as truth depends on, or is determined by, the conceptual system in operation" (1993:519). For example, the Insights Discovery colour energies are not naturally existing categories. They may be well established means of segmenting personalities, but by their very existence, these categories limit our results and the conclusions we draw. This idea is clarified in Foucault's 'The Order of Things', where he relates a short story by Jorge Luis Borges concerning the classification of animals in a Chinese encyclopaedia. The classifications included for example; 'belonging to the Emperor', 'embalmed', 'tame' and 'fabulous' (1970:xv).

Philp states, "When we classify objects we operate within a system of possibility - and this system both enables us to do certain things, and limits us to this system and these things" (1985:70). Foucault therefore illustrates how conventional ways of classifying and ordering limit the boundaries of our analysis, and urges us to view the world in new and different ways.

## **7.6 Reshaping the individual**

Historically, individuals were "expected to complete their allotted task without involving their essential self" (Ackers and Preston, 1997:678). However HRM and HRD has merged the economic role and personal self, resulting in the individual being seen as an entity with an observable reality, there to be discovered and analysed. This premise forms the basis of many HRM and HRD practices, e.g. recruitment and selection, appraisal, training and development and psychometric testing. Ackers and Preston argue that "some organizations have begun to demand the very souls of their staff, and especially their managers, as the key to active commitment" (1997:678). Barratt asserts that practices

such as “self-development, competencies, involvement practices and empowerment” are all designed explicitly to engage the “psyche of the employee” (2003:1073).

Attempts to harness the employees ‘soul’ for productive ends forms part of a long history of investigation into the relationship between work psychology and organizational behaviour (Hollway, 1991). Chryssides and Kaler state that “a more fundamental ethical objection to these current intrusive forms of HRD may tie current concern about stress and overwork in with the latest invasion of employees’ private beliefs and personalities” (1993:97).

Foucault (1977) highlights the real danger as being not necessarily that individuals are repressed by the social order but that they are "carefully fabricated in it" as power penetrates into their behaviour. He recognizes that, “in order to obtain productive individuals, power has to be able to gain access to the bodies of individuals, to their acts, attitudes and modes of every day behaviour.” (1980b:125). Ackers and Preston assert that “if we respect people and their rights, there is something unethical about shaping the personality of an individual to suit the organization and expecting that organization to dominate their lives” (1997:696).

The Foucauldian perspective is not concerned with whether the processes or knowledge generated by HRM and HRD practices is true or false. “The focus of analysis becomes the "knowability" of the individual - the process by which the individual is rendered knowable, or the process by which the individual is constructed or produced” (Townley, 1993:522). The questions therefore become; What “is involved in rendering an individual knowable: What are the processes by which they become known? How do these processes become established and used? What are their effects?” (1993:523). These questions are in line with my own research questions;

- What are the implications and consequences of using the Insights Discovery tool?
- How can the distinctive power and influence of Insights Discovery be explained?
- How can learning from the delivery of the Insights Discovery tool inform other HRD interventions?

The focus, therefore, is on how psychological profiling operates to create knowledge, power and order in organizations.

Psychological profiling is just one HRM technique that operates to ensure that individuals become segregated and classified. Some organizations subversively use the Insights Discovery model to rank employees and facilitate a serial ordering of individuals. "Identities are not absolute but always relational; one can only ever be seen to be something in relation to something else" (Clegg, 1989:159).

Townley describes "selection testing, as a systematic procedure for observing an individual's behavior and describing it with the aid of a numerical scale of category system" (1993:529). The Insights Discovery tool works in the same way, describing individuals not by numerical ranking but in terms of colour preference. Partitioning is achieved via the complex software which allows "similarities and differences" between individuals to be highlighted. "Such similarities and differences render individuals observable, measurable, and quantifiable" (1993:529) . "The very act of enumerating attributes in a programmatic or codified manner allows for the amount of a particular attribute or quality to be measured and thereafter compared with others" (1993:529). Just as selection tests provide "a grid of codability of personal attributes" (Rose, 1988:181), enhancing "the calculability of individuals by placing them on a comparative scalar measure" (Townley, 1993:529), psychometric tests provide a medium for attitudes and traits to be described and quantified, and in doing so they "enable a population and the individual's place within that population to be known" (1993:529).

## **7.7 A disciplinary technique**

Insights Discovery, though presented as a self-analysis tool to prompt reflection on naturally occurring divisions, is undisputedly a disciplinary technique and a normalizing process. It operates by classifying the individual, behaviourally and numerically within the model, locating them in relation to the whole, and in doing so the model reduces

individual singularities. This can be seen, for example, in the team colour wheel where an individual's colour energy preference is compared to the whole. "Ranking enables individuals to be known through being differentiated from one another" (Townley, 1993:530). It measures and segregates according to the colour energy of the individual, their attributes and abilities, and the perceived organizational value of that particular colour energy.

The model acts as a form of performance appraisal, systematically allowing judgement to be made and conclusions to be drawn on how the individual needs to change in his behaviour and attitudes. "The distribution according to ranks or grades has a double role; it marks the gaps, hierarchizes qualities, skills and aptitudes but it also punishes and rewards" (Foucault, 1977:181). It is promoted that the model offers a 'safe' environment and language for constructive feedback to be given. McGregor states that; "the conventional approach, unless handled with consummate skill and delicacy, constitutes something dangerously close to a violation of the integrity of the personality. Managers are uncomfortable when they are put in the position of 'playing God'" (1972:134).

Perhaps then the appeal in this model is that the profile takes the responsibility away from managers, offering detailed lists of strengths, weaknesses and development areas etc. As the manager only enters the process once the employee has completed the online questionnaire, attended the workshop, reflected on the profile, assessed their strengths and weaknesses and formulated an action plan; the manager's role therefore becomes one of supporter rather than critic. Thomas and his manager used the opportunity provided by Insights Discovery to break with the historical norm and spend time talking to each other;

*"Since working here I have never properly spoken to my manager. The week after the workshop I made the effort to sit down with her. I told her about the workshop and we discussed my profile. It was only half an hour but I think we understand each other a bit more now."*

*[Thomas, Participant, Organization E]*

From another view point however, the model has created problems, raising tensions between participants and their managers.

*“It has opened a can of worms! It was as if some of the supervisors suddenly realised that they knew more than their managers. They’d had their eyes opened to senior management failings and it created a negative reaction. I think they felt angry that they were expected to work in a certain way with their teams, but their managers weren’t doing it with them. Rather than bridging the gap between layers of management – what I’d hoped would happen - it caused a lot of friction and frustration. The knowledge the supervisors have gained has made some of them dissatisfied with the way things are and they are pressing for things to change. I didn’t expect things might get worse before they got better.”*

*[Julie, HR Advisor, Organization E]*

Another manager described more challenging and improved communication between himself and team members.

*“I suddenly realised why my relationship with some people in my team were strained and difficult. After the session we talked about Insights Discovery in our team meeting and made a poster showing the best way of communicating with each other. It’s a year now since the workshop but we still have it on the wall – it’s a good reminder of what to do and what not to do.”*

*[Mary, Participant, Organization B]*

The Insights Discovery tool allows employees to conduct their own self-analysis and establish personal goals. This is a method influenced by the work of Drucker (1994), who called for a shift from appraisal to analysis – which he understood to be a more positive approach . No longer is the employee being examined by the manager in order to determine weaknesses, rather they are self-examining, becoming an active agent, not a passive object.

The responsibility is therefore firmly on the individual to develop and put plans into action. The assumption is that the “individual knows . . . more than anyone else about his own capabilities, needs, strengths and weaknesses, and goals....” (McGregor,

1972:136). The manager is released from the necessity to know what is best for the individual and has no need to coerce and direct; instead the employee behaviour is subtly manipulated to suit organizational needs. Jermier has observed that increasingly, control strategies are disguised in the language of “empowerment” “teamwork” and “development” (1998:235).

McGregor recognises that personality tests and a manager’s knowledge of an employee yield at best an imperfect picture. Psychometric tests, he believes, “have genuine value in competent hands. Their use by professionals as part of the process of screening applicants for employment does not raise the same questions as their use to ‘diagnose’ the personal worth of accepted members of a management team”. He believes that problems would not arise if the “results and interpretations were given to the individual himself, to be shared with superiors at his discretion” (1972:136).

Foucault (1977) highlighted two key practices that allow organizations to collect knowledge about individual employees . These are “the examination, which constitutes the individual as an object of knowledge, and the confession, which ties the individual to self-knowledge and establishes concepts of subjectivity” (Townley, 1993:533). The elements of examination and confession are seen clearly in the Insights Discovery personality testing model.

Examination is demonstrated in the physical process of the Insights Discovery Test. Individuals complete an online evaluator, a 25 frame questionnaire. Participants are asked to be as open and honest as possible in acknowledging which statements from 100 word pairings characterize them most accurately. They are asked to select one from a ‘least to most scale’ of L 1 2 3 4 5 M.

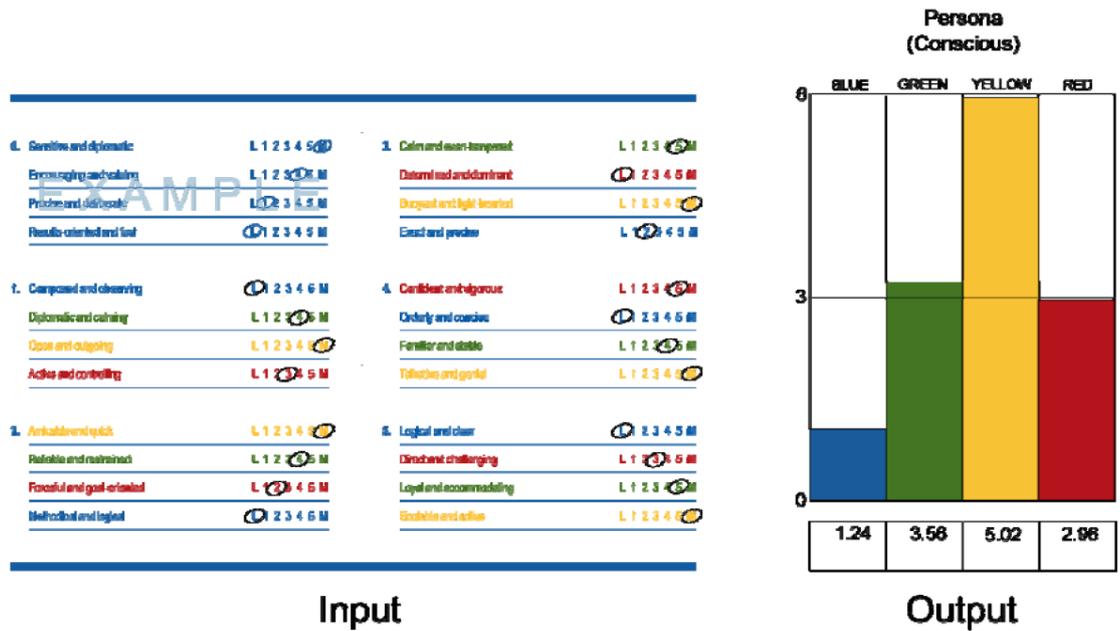


Figure 2: The Insights Discovery questionnaire and colour preference graph

Townley claims that “personality testing .. introduced a standardization to personality, and the techniques of scaling further introduced the subjective dimensions of individuals to the sphere of knowledge and regulation” (1993:534). Rose observes the “internal world of the factory was becoming mapped in psychological terms, the inner feelings of workers were being transmuted into measurements” (1990:85).

Psychometric tests by their very nature bring about compartmentalization. Insights Discovery creates personality types and human nature in its abstract form becomes a concrete entity. Actions are carried out because a person is red or because a red person behaves in that way. “Labels may become incorporated into an individual's self-assessment, the means through which individuals identify their feelings and behavior to themselves and others” (Townley, 1993:535) as discussed in Chapter 6.

Psychometric tests therefore provide organizations with a simple, easy to use tool to evaluate, measure and control staff, "representing in standard forms human mental capacities and behavioural characteristics which previously had to be described in complex and idiosyncratic language" (Rose, 1988: 195). Thus, psychometric tools are a perfect instrument for HRM, whose rationale “is to create the individual as an

analyzable, describable subject" (Burrell, 1988: 202), in order to assess, judge and compare them to one another.

Confession is normally an activity associated with religion, however Foucault (1981, 1985, 1986, 1988a, 1988b) recognizes the parallels between the way in which an individual acknowledges their actions and thoughts and owns up to weaknesses in an organizational environment. Rose noted, "In compelling, persuading and inciting subjects to disclose themselves, finer and more intimate regions of personal and interpersonal life come under surveillance and are opened up for expert judgement, normative evaluation, classification and correction" (1990:240). "Disciplines characterize, classify, specialize; they distribute along a scale, around a norm, hierarchize individuals in relation to one another and, if necessary, disqualify and invalidate" (Foucault, 1977:223).

Confession in the context of the Insights Discovery workshop requires participants to be open and honest, subtly admitting to weaknesses, failings, false assumptions and previous 'wrong doing' as they subscribe to their colour energy preference. The process then requires them to adopt new ways of thinking and being, so as to become improved team members and employees. This is an example of how HRM and HRD practices operate to transform an individual by self-knowledge and by creating a new and better identity.

## **7.7 Social construction**

Johnson and Duberley (2000) use the term 'cultural doping' in drawing attention to the ways in which many organizations use various socialization techniques in order to inculcate employees into adopting prescribed attitudes, values and expectations. It should be highlighted however that individuals do have agency and are not simply sponges, blindly accepting whatever the organization throws at them. However, employees can be subtly moulded to accept prescribed beliefs and values as their own.

The Insights Discovery model measures the effort individuals are putting into developing the 'mask' that they wear in work situations and questions why we feel pressure to behave in a certain way at work. We each have our own expectations of how a person in our position should behave – perhaps constructed from representations in the media, role models in the workplace etc.

Undoubtedly the organization plays an influential role in the colour energies individuals consider to be appropriate for their role and position within the organization. It could be said that part of the HRM and Learning and Development team role is to shape employees and indoctrinate them into the organization. Learning interventions, particularly those using transformational learning techniques, overtly attempt to remould individuals to act in certain ways, bonding them to what are considered to be "appropriate" identities. At the same time, organizations may be subtly shaping identity by promoting, advocating and normalising certain behaviours, perhaps via performance management systems; favouring some attributes at the expense of others. "Disciplinary procedures most obviously define the parameters of acceptable and non-acceptable behavior, and as such, they contribute to the process of individuals' being able to identify the valid from the invalid" (Townley, 1989:537).

The Insights Discovery model emphasises managing behaviour to better connect with others. This involves a change in the normal way we behave and interact, and by definition demands the " inculcation of required habits, rules, and behavior and socially constructed definitions of the norm" (Townley, 1993:537), 'the correct way to be'. "However, the status of the individual, that is, the individual's right to be different and everything that makes the individual truly individual, tends to get lost in these processes" (1993:537). Other mechanisms are more subtle, surreptitiously moulding and sometimes blatantly pressurizing people into being something they are not. What colour is most valued by the organization? What does my manager want me to be like? What do I need to be like to get on around here?

There is also evidence to suggest that whilst the aim of the model is to encourage participants to appreciate differences in perspectives, in some cases the opposite is true. Polarisation occurs when people with certain colour energy preferences band together in solidarity. This can in turn lead to “in-group bias” – the tendency for people to give preferential treatment to others they perceive to be members of their own group.

This was particularly true in Organization C where it appeared one colour was perceived as ‘best’, “the red badge of honour”. This view was also reflected in anecdotal evidence from a participant who had attended a ‘faux’ Insights presentation’ at Organization F, a company not covered by my research. This participant did not complete the evaluator and so was not issued with a profile. The facilitator in question asked some simple questions and then told participants what ‘colour’ they were.

*“My feelings on the day were preconceived; I had an idea of what “colour” I was based on other people’s feedback. I kind of understood that the point of Insights is to determine that you need to have a bit of every colour and gain understanding on how to deal with other personality types more effectively. However, this didn’t really come across in the afternoon we had. It was treated more like a competition, with the Red personalities being deemed “the best”. We had one Yellow person in the group who got laughed at and called a clown. For the purpose of the next exercise (come up with an idea for a carnival) somebody had to be forced to work with the yellow person to try and even out the numbers. Nobody wanted to be seen as introverted or “boring” so a few people just followed what the majority did. Circling the words that fitted with your personality was a bit of a pointless exercise because people chose the words based on the colours knowing that they wanted to be seen as the ‘best’ colour.”*  
*[David, Participant, Organization F]*

The belief held by this organization, and others involved in my research, that ‘red is best’, appears to flout the trend “towards charismatic ‘super bosses’ with elusive soft people management skills” (Ackers and Preston, 1997:686). This prevailing perception resulted in dominant ‘reds’ intensifying their directive approach, using it as a licence for their

behaviour, “it’s ok for me to act this way – I’m red” and treating more submissive colours in a derogatory way. The exert below illustrates this well;

*“One person said to his direct reports ‘The point of the workshop was for me to adapt my style to become a better a manager but I’m a red so you’d be best adapting your styles to fit in with me”.*

*[John, Participant, Organization C]*

It is interesting to consider that behaviour is unconsciously modified to fit the label given (Rosenthal, 1987). Although the model stresses equal value to all colour energies it is clear that some organizations value some energies more than others.

Anecdotal evidence of companies who use Insights Discovery during recruitment and hire only those who come out with high red ‘directive’ energy confirms this. Others make noises about giving equal importance to all colours and then tell employees they need to promote themselves more and be ‘more red’ to get on in the business. Amy’s experiences illustrate this position perfectly;

*“When our team went through Insights the predominant message was that all the colour energies were good – no one was better or more important than the rest. What was important, was to have a good mix of all the different colour energies in a team or organization. I felt excited..really good about this – like a weight had been lifted, because at last it seemed that my ‘softer’ more introverted qualities were being recognised and valued. Before I’d always felt my style of ‘not wanting to blow my own trumpet’ and keeping myself to myself was frowned upon a bit and held me back.*

*Unfortunately the excitement soon wore off when I realised that it was all a sham. It still wasn’t good enough to be green and stay green and there was certainly no feeling of equality between the colours. In no uncertain terms if you want to be successful here you have to shout about your achievements and be ‘loud and proud’ – all things I’m not good at and am definitely not comfortable doing..”*

*[Amy, Participant, Organization A]*

It appears not to matter if participants do not want or feel able to change, “in classic utilitarian terms, the end justifies the means, as the individual is sacrificed for the business organization, in the train of the struggle for ever higher economic utility” (Smith and Johnson, 1996:5).

It could therefore be said that it is completely acceptable for an organization to attempt to manipulate and change the attitudes and behaviours of employees, if in doing so higher productivity is achieved and the business becomes more successful as a result.

## **7.8 Concluding remarks**

In this chapter I have considered the distinct, yet often subtle, ways power and influence emanate from the Insights Discovery model and have searched to uncover their possible sources. I aimed to investigate Insights Discovery’s ‘je ne sais quoi’ and uncover the ‘extra something’ that sets it apart from other psychometric tests and learning and development tools. Of course, as in previous chapters, this has inevitably involved some interpretation and conjecture in deciding what to select and how to express and order it.

It is clear from the research that the Insights Discovery arena is one in which the participants become exposed to the gaze of their organization, and also to the gaze of their colleagues and managers. Participants become the subject of public scrutiny and judgement, not only in connection with their own personality and identity, but also in how they perform as managers and employees. I have therefore drawn on academic literature such as Foucault’s (1977) ‘panopticon’ metaphor, in order to explain how HRD acts as a central organising mechanism exposing participants to the scrutiny of others.

This chapter has also exposed how sharing the outcomes of the Insights Discovery model can turn an inert document into a powerful force used by HRM and HRD as a means of classification and control, presenting opportunities for both discipline and correction. It has reflected on the extent to which Insights Discovery provides a vehicle for social

construction to occur, considering how individuals are encouraged to reshape their essential self in a mould presumed commensurate and fitting with organizational norms.

This chapter, in combination with Chapter 6 and its discussion of stereotypes, constructs a picture of the Insights Discovery model within which segregation, power and gender are identified as entwined and highly charged elements. I have postulated that Insights Discovery has the potential to be used as an examination tool with the expressed intent of discipline, correction, control and ultimately conformity.

This chapter therefore addresses and specifically contributes to the research question;

‘How can the distinctive power and influence of Insights Discovery be explained?’

The process of making interpretations and linkages, relating the findings to previous research and commentary, personal experience and opinions, have resulted in the development of tentative theories. This has been done transparently in order to have validity, and therefore the reader has been guided between findings and theories, showing the path taken.

Chapter 8 is the third and final chapter that draws on a key theme, identified from the empirical material, to analyse the data. It continues the investigation into the distinctive power and influence of the Insights Discovery model by further examining its use of colour. Specifically the next chapter focuses on the influence of colour and the role it plays in explaining the outcomes and consequences of using the Insights Discovery tool. It challenges the claim that the use of primary colours is merely an innocent visual aid to improve understanding and recall, which simply contributes to the fun, childlike appearance of the test.

## **8. The Importance of Colour**

### **8.1 Introduction**

The previous chapter considers the distinct, yet often subtle, ways power and influence emanate from the Insights Discovery model. In combination with Chapter 6 and its discussion of stereotypes, Chapter 7 constructs a picture of the Insights Discovery model within which segregation, power and gender are identified as entwined and highly charged elements. I have postulated that Insights Discovery has the potential to be used as an examination tool with the expressed intent of discipline, correction, control and ultimately conformity.

Chapter 8 aims to further investigate Insights Discovery's 'je ne sais quoi' and uncover the 'extra something' that sets it apart from other psychometric tests and learning and development tools. Of course, as in previous chapters, this has inevitably involved some interpretation and conjecture in deciding what to select and how to express and order it.

This chapter, driven by the emotive responses derived from participant interviews, builds on Chapters 6 and 7 by examining the model's use of colour. Specifically this chapter focuses on the influence of colour and the role it plays in explaining the outcomes and consequences of using the Insights Discovery tool. It challenges the claim that the use of primary colours is merely an innocent visual aid to improve understanding and recall, which simply contributes to the fun, childlike appearance of the test. Links between colour, gender stereotyping and power are discussed in an attempt to understand participant interpretations.

The empirical data supports the inclusion of this chapter, which intentionally and purposely focuses on the colour red, making only transitory reference to the other colour energies - blue, yellow and green. The examination deliberately concentrates on investigating the prevailing perception that 'red is best' and seeks to develop an understanding of the historical connection between the colour red, status, gender and

leadership. It also seeks to discover why other colours are seemingly perceived as being less significant.

This chapter therefore addresses and specifically contributes to the research questions;

- What are the implications and consequences of using the Insights Discovery tool?
- How can the distinctive power and influence of Insights Discovery be explained?

## 8.2 Why is red perceived as best?

*“There is definitely a perception that ‘red is best’ around here. It’s like a not so secret society. Knowing glances and approving looks when some say they’re red. For me it just confirms that that you’ve got to be dominant and bolshie to get on.... Because it reflects the general management style, the bosses look at the reds coming back from the sessions and it’s like they’re saying ‘well done son – you’re one of us.... ‘ I personally feel like as soon as I know someone’s red I want to stay well clear of them and keep a safe distance.”*

*[Chloe, Participant, Organization C]*

The Insights Discovery four colour model is promoted as being simple and accessible. Its visual properties help it to be “easily understood and remembered, so everyone can apply what they learn” (Insights®, 2012). This is contrasted with other text based psychometric tools, such as MBTI, which are considered by some to be more complex and difficult to remember after the event.

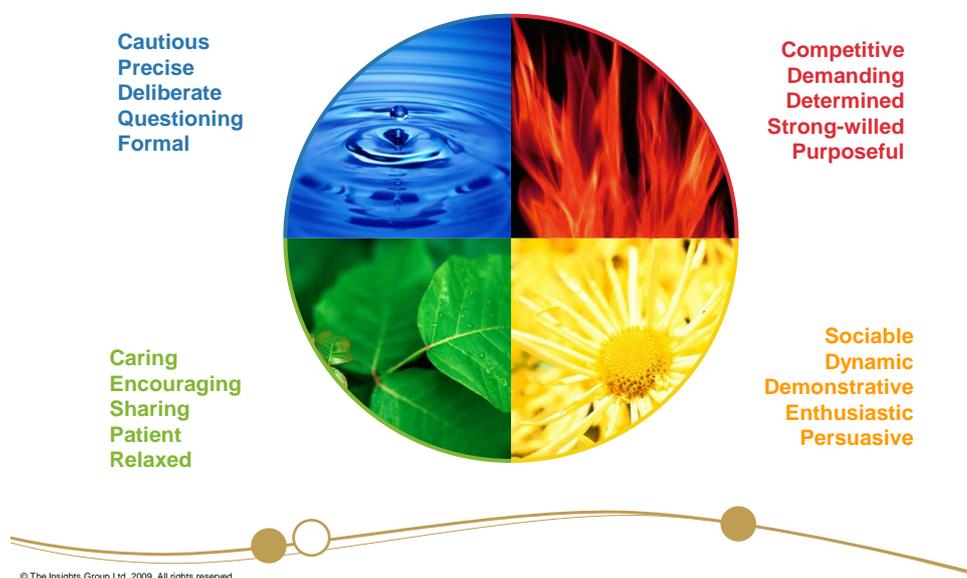
The primary colours appear to be innocuous, coating the model with a veneer of childlike innocence. This appearance is encouraged by the facilitator who ask participants to act as a child, curious and open to new possibilities, quoting Heraclitus; “Man is most nearly himself when he achieves the seriousness of a child at play”.

The model is described as intuitive and instinctive as participants are asked to describe what behaviours they believe go with which colour energy. Invariably even when they have no previous knowledge of Insights Discovery, they are correct in their assumptions. The process of linking attributes with colour therefore appears to be an instinctive rather than rational process and it is apparent that colours invoke strong and similar responses in all participants.

We are advised by experts that colour is not 'a reality'. Our perception of colour is merely a product of how our eyes interpret electromagnetic radiation - not an attempt to represent the world as it really is. All our perceptions are therefore grounded in our evolutionary history, which provides us with some of our underlying assumptions, and our personal, culture-infused life history provides us with the rest. Colour is simply a useful way that our brains have devised to represent the world. It can be argued therefore that colour associations are all learned. For example, the English language links the colour red and volatility - we say people have fiery temperaments and the Insights Discovery module refers to 'Fiery Red'. Feeling 'blue' is to feel sad and saying someone is 'green' implies they are inexperienced or gullible.

Colour is ubiquitous in an individual's perceptual experience of the world and the human body has an inherent physiological reaction to colour, reflected in psychological experience and functioning (Goldstein, 1942). Perhaps this inherent reaction is caused by something that goes beyond the description of the colour energies (see Figure 3) in the presentation slides and can explain more about the research findings.

## The Insights Colour Energies



*Figure 3: The Insights Discovery colour energies*

Why people like or dislike certain colours is a relatively under researched area. Selectivity is pervasive; individuals prefer some things more than others, some people more than others. Lange and Rentfrow (2007) however sought to uncover whether individual colour preferences provide a useful insight into personalities, interpersonal styles and behaviours. Reaction to the colour energies may therefore be about more than the Insights Discovery description and historical and evolutionary factors.

From a practical perspective, the use of colour promises to assess personality in a neutral, non-biased way; however colour has been shown to affect our mood at a fundamental level, affecting our interaction with the environment. Lüscher and Scott (1971) are perhaps the most prominent academic researchers to link individual colour preferences with personality traits. Other research into environmental psychology has proved that “the colour of a room or work setting can have profound effects on individual enjoyment and performance on a variety of tasks” (Lange and Rentfrow, 2007:1). French and Alexander (1972) also found that individuals preferring the colour blue were calmer, while those preferring yellow related it to ‘positive’ feelings of

happiness and joy . Seefeldt (1979) found that women preferred yellow more often than men. The findings also suggested that older men preferred red and younger men blue . In contrast, Stimpson and Stimpson (1979) concluded that there were no differences in the colours male and female participants preferred, and there was no relationship observed between colour preferences and personality.

Eysenck (1970) claimed that introverted people were 'high in internal arousal', preferring therefore their own company and being more concerned with their inner thoughts and feelings than their extravert opposites. This results in a preference for cooler and calmer colours such as blue and green because they have the effect of calming inner arousal and preventing uncomfortable and overwhelming feelings.

On the other hand, extroverts, people with low internal arousal, were drawn to exciting, warm colours, for example red and yellow, which are capable of increasing internal arousal. These findings mirror the Insights Discovery colour wheel which places introverts in the blue/green position and extroverts in red/yellow.

Goldstein (1942) proposed that red and orange (longer wavelength colours) are perceived as stimulating and disagreeable, whereas green and blue (shorter wavelength colours) are viewed as calming and agreeable. He alleged that longer wavelength colours, relative to shorter wavelength colours, impair performance on complex tasks. For example if surrounded by red or orange, individuals performed less well than if surrounded by other colours. Stone's (2001) research findings concurred with Goldstein, concluding that red increases levels of arousal, which when experienced alongside a stimulating task, results in reduced cognitive performance.

The participants in Eysenck's (1970) study overwhelmingly related green and blue with the words 'secure', 'tender' and 'calm', contrasting with the association of red with 'defiant', 'cheerful', 'exciting', and 'powerful'. This suggests that the implicit links between colour and mood and the ability for colour to bring forth powerful emotion is consist across different social and cultural groups.

Elliot et al state that colour “does influence performance and psychological functioning more generally and that it does so via learned associations that may be embedded in deeply ingrained predispositions” (2007:155). Academics state that some colour associations are thought to be specifically a result of learning, however others suggest that they have their roots in evolutionarily ‘deeply ingrained predispositions’ (Jacobs, 1981, Mollon, 1989).

Colour therefore may not only have visual value, but also has the potential to convey specific meanings and information. Individuals are subjected to both explicit and subtle pairings between colours and particular messages from childhood. With repetition and reiteration, these pairings produce strong yet unconscious colour associations that affect cognition and behaviour. Elliot et al conceive that “color carries different meanings in different contexts and, therefore, that color has different implications for feelings, thoughts, and behaviours in different contexts” (2007:156).

Research investigating associations to colour words and stimuli has demonstrated that red is linked to strength, power, and competitive dominance (Little and Hill, 2007, Schaie, 1961). This red-power relationship appears to be present across cultures and age groups (Williams and McMurtry, 1970) and is confirmed by Adams and Osgood (1973), whose study showed that red is associated with the words ‘active’ and ‘strong’ . This is reflected in the Insights Discovery descriptors of the red colour energy – ‘Competitive, Demanding, Determined, Strong-willed, Purposeful’.

Interestingly, these descriptions match almost perfectly with the work of the Trait theorists who sought to identify innate qualities and characteristics possessed by great social, political and military leaders. A powerful connective chain is therefore forged between the colour red, associated status and behaviour, and leadership, creating a leadership blueprint which then becomes ‘true’, a common sense assumption.

<b>Stogdill (1948)</b>	<b>Mann (1959)</b>	<b>Stogdill (1974)</b>	<b>Lord, DeVader, and Alliger (1986)</b>	<b>Kirkpatrick and Locke (1991)</b>
Intelligence	Intelligence	Achievement	Intelligence	Drive
Alertness	Masculinity	Persistence	Masculinity	Motivation
Insight	Adjustment	Insight	Dominance	Integrity
Responsibility	Dominance	Initiative		Confidence
Initiative	Extroversion	Self-confidence		Cognitive ability
Persistence	Conservatism	Responsibility		Task knowledge
Self-confidence		Cooperativeness		
Sociability		Tolerance		
		Influence		
		Sociability		

*Table 4: A comparison of Trait Leadership Theorists*

This ‘cognitively represented ideal image of a leader’ is discussed by Implicit Leadership Theorists (Foti et al., 2012). The ideal leader prototype determines who we consider capable and worthy of the role and who we grant leadership to. Perhaps most ominously, it also controls to what extent individuals perceive themselves as measuring up to the leadership prototype and dictates whether they put themselves forward for leadership roles (Lord and Maher, 1991, Shondrick et al., 2010).

Red has historically been used as “a symbol of authority, wealth, and status” (Elliot et al., 2010:400). Tacon discusses the prevalence of red in his investigation into the rock art of Australia and links its use to the “concepts of ancestral power, creation and procreation”, asserting that “these associations probably were important for at least 1000 years and perhaps as much as 3500 years beyond that time” (2008:173). Wreschner et al state that “red may have been conceived as containing the power (or being the power) of ensuring life”. They go on to say that “in many primitive societies, red ochre and red things are conceived as powerful medicines against disease and death, but they are equally thought effective in ensuring life after death” (1981:642).

Orchardson-Mazrui (1998) also refers to African tribes decorating their bodies with red ochre and wearing red jewellery to symbolise power and rank . Donkin states that “almost everywhere, red as the color of fire, the sun and blood (and thereby life itself) has unusual significance, symbolizing magnanimity and fortitude, majesty and power, both temporal and supernatural” (1977:5). Greenfield (2005) recounts the history of cochineal, a legendary red dye that was once one of the world's most precious commodities and relates that ancient Rome’s most powerful citizens were named ‘coccinat’ or ‘the ones who wear red’ .

Gage (1999) and Munro (1983) consider the meaning of colour in the particular historical contexts in which it is experienced. The use of a red cross on a white shield by the Christian church in the late 12th century was intended to be a symbol of authority and conveyed nobility and rank, worn by kings, cardinals, and judges. Ewing relates to medieval literature, which describes “red as a colour of splendour and finery” (2006:4).

Brett Gorvy, Chairman of Contemporary Art at Christie's International Paintings describes red as the "most lucrative colour" with painting incorporating red commanding far higher prices than those without. Philip Hook, from Sotheby's, has called the power of red " quite extraordinary", with a "judicious touch" giving a painting a "huge extra piquancy and impact" (Furness, 2014). In today’s business world it is commonly accepted that wearing a red tie indicates power, a day of significance is called a ‘red letter day’ and we ‘roll out the red carpet’ for celebrities or dignitaries who warrant special treatment.

The source of the link between red and high status are not fully known or understood, however whilst it may have its roots in social conditioning, traditions, and acquired habits, many researchers surmise that the source of the connection lies somewhere in our evolutionary past and biological heritage. Observation of the animal world confirms this by revealing similar links between the colour red and rank.

Although other colours are also present in animal displays, it is specifically the presence and intensity of red that correlates with male dominance. In a wide variety of animal species the dominant male will manifest the brightest red colours. The colour red is

commonly used to express status, fertility, and power and is a testosterone dependent signal of male quality (Dixon, 1998, Ligon et al., 1990, Milinski and Bakker, 1990). In men, forceful physiological processes such as strong blood flow and high testosterone levels produce a reddish skin appearance, signalling reproductive potential.

In birds and primates alike, the presence, size, and intensity of red displays link with dominance and resource-holding potential in males (Andersson et al., 2002, Pryke and Griffith, 2006, Dixon, 1998, Setchell and Dixon, 2001, Setchell and Wickings, 2006). In humans, anger and aggression is associated with an increased reddening of the skin in the dominant individual, due to increased blood flow. Fear is associated with decreased redness in threatening situations and therefore submissive individuals become pale through changes in blood flow (Darwin, 1872, Drummond and Quah, 2001).

There are striking parallels between human males and other male vertebrates regarding status, testosterone, vascular processes, and pigmentation (Elliot et al., 2010:400). Particularly in competitive male environments, status and testosterone appear to be positively linked. Testosterone levels of those confident in their success increases prior to competition and immediately after success. This pattern of testosterone levels is predictable in both physical and mental tasks (Elias, 1981, Mazur and Lamb, 1980) (Gladue et al., 1989, Mazur et al., 1992).

Testosterone has been proved to encourage “peripheral vasodilation in men, increasing blood flow in visible areas of the skin” (Elliot et al., 2010:401). Higher levels of oxygenated haemoglobin in the blood also produce greater redness of visible skin (Changizi et al., 2006). Red skin may therefore indicate physical strength and fitness, “because testosterone-induced skin vascularisation are associated with health and vigour, whereas deoxygenated haemoglobin levels are associated with several different forms of disease and illness” (Elliot et al., 2010:401).

Studies into the effects of artificial red (for example red face paint, red clothing) have also had positive responses and have shown to be an efficient means of conveying male status (Cuthill et al., 1997). Attrill reports that “responses to the colour red in contest

situations can also be exploited by artificial stimuli. In zebra finches, the presence of red plastic rings increases the dominance rank of male birds” (2008:578).

Hill and Barton (2005) explored the hypothesis that wearing red would improve success in the 2004 Olympic Games by signalling dominance and strength to their opponents. The study involved randomly assigning red or blue kit to contestants in four combat sports (boxing, tae kwon do, Greco-Roman wrestling and freestyle wrestling). In all for contests, the rate of winners wearing red kit was significantly higher . Rowe et al (2005) disputed these findings however by stating that wearing blue also increases chances of winning against white . They suggest that red has no special qualities and that improved results may come from increased visibility.

Elliot et al (2007) examined the influence of the colour red more closely, in relation to performance. They hypothesized that when an individual is faced with red their performance is unconsciously impaired . Red is, in this context, associated with danger, specifically, the psychological danger of failure. Perhaps this is why those participants with blue, green or yellow colour energies may feel threatened and dominated by those with a ‘red’ label and feel they should be avoided.

Elliot et al (2007) propose that the association between red and failure is the result of social conditioning from an early age, e.g., mistakes are highlighted with a red pen. The repeated pairing of red with mistakes teaches an association between red and failure in achievement contexts. This association is bolstered and elaborated on over time by the link between red and danger in other contexts, red traffic lights, red fire alarms, red warning signs.

“Red therefore comes to function as a danger cue in achievement contexts, signalling the possibility of failure” (Elliot et al., 2007:156). Studies by Bargh and Chartrand (1999) and Cacioppo et al (1999) have shown that “encountering a negative object, event, or possibility (including the dangerous possibility of failure) automatically evokes a motivational tendency to avoid that object, event, or possibility...Thus, the perception of red in achievement contexts is hypothesized to impair performance because it evokes

a motivational tendency to avoid failure that, ironically, undermines performance” (Elliot et al., 2007:156).

Hill and Barton (2005) surmise from their study investigating the Influence of colour of sporting attire on the outcome of competitive sports, that the “red advantage” applies across a variety of sports and situations. This contests Rowe et al’s (2005) argument that the success of red kit teams is due to improved visibility and adds weight to a psychological and/or hormonal source. The ‘red advantage’ was evident in the Organization C where;

*“reds generally seem to have more respect. You get better thought of for being abrupt and curt than for being nice and caring – people fear getting on the wrong side of them. My manager is red and her comments can sometimes be quite hurtful and cruel. She thinks she is always right and any other opinion is wrong.”*  
[John, Participant, Organization C]

Elliot et al (2007) promulgate the suggestion that the red triggers a psychological reaction which affects performance. Their study states that simply viewing red stimuli impairs performance, suggesting that opponents of red kitted out teams or individuals would be experience a negative psychologically impact. Red may therefore influence self-perception and other perception. For example “wearing red may subtly enhance a man’s sense of his status or power in a given situation, which in turn could influence his thoughts, feelings, and actions in that situation. Thus, a man in a red tie may give a more confident business presentation, a man wearing a red football jersey may play more aggressively (2010:411).

Instances of red impairing performance were evident throughout my research;

*“Before the session I knew my boss was direct and never really listened to what I was saying. Since finding out I was green and he was red I’ve become even more nervous. Knowing more has made it so much worse. I feel like he’s looking at me and thinking what a gibbering idiot – why ever did I employ her.”*  
[Jennifer, Participant, Organization C]

Red also appears to be an influence of attraction between men and women: Elliot et al have shown that “red enhances women’s attraction to men” (2010:411) and subsequent studies by Elliot and Niesta (2008) also suggest that “red enhances men’s attraction to women”.

Clear parallels therefore exist between response to redness from both humans and animals which leads to conclusions that responses are inherent and primitive. The research of Elliot et al illustrates how “red is used in communication between the sexes, conveying important information in subtle, and perhaps even automatic, ways” (Elliot et al., 2010:412).

Elliot et al (2010) therefore conclude that women are more sensitive to the dominance of red whereas men are more sensitive to physical competitiveness of the colour. They suggest that women are predisposed to assuming male redness indicates high status and offer several explanations for this predisposition. Organizational life is highly competitive, with formal and informal evaluation a ubiquitous part of day to day activities (Elliot, 1999, Mussweiler et al., 2004). Employees constantly strive to outperform others and show themselves as knowledgeable and witty etc. Therefore, men engaging in day to day competitive, high power situations will experience increased facial blood flow caused by raised levels of testosterone. “As such, successful, high-status men may display red colouration more often in normative evaluative contexts than do unsuccessful, low-status men” (Elliot et al., 2010:401).

Whether women feel more attractive to male ‘reds’ was not a question addressed in this research, but perhaps a desire to be attractive is one explanation why so many men wanted to be seen as red – as evidenced by Margaret’s comment below;

*“In effect the Product Managers chose to be red by deliberately answering questions to get them there. They seem to think that the more dominant, assertive and confrontational they are the better.”*

*[Margaret, Participant, Organization F]*

Elliot et al argue that the historical connection between red and high status is not a random coincidence but is rooted biologically with our animal ancestors. “This societal use of red may be seen as not only reinforcing the biologically based use of red but also as extending it beyond natural bodily processes” (2010:402). The result of this inherent predisposition is that red can be impactful, whether or not it occurs naturally or can be observed on the body. Artificial red has been shown to be equally influential. For example red clothing, a red car or indeed a ‘red’ classification label may be enough to induce perceptions of power and status in others.

### **8.3 Concluding remarks**

This chapter, driven by the emotive responses derived from participant interviews, has built on Chapters 6 and 7 to consider the distinct, yet often subtle, ways power and influence emanate from the Insights Discovery model. Specifically this chapter has focused on the influence of colour and the role it plays in explaining Insights Discovery’s ‘je ne sais quoi’ - the ‘extra something’ that sets it apart from other psychometric tests and learning and development tools.

The empirical data necessitates the inclusion of this chapter, which intentionally and purposely investigated the prevailing perception that ‘red is best’ and developed an understanding of the historical connection between the colour red, status, gender and leadership. In doing so, it has been possible to determine why other colours are perceived as being less significant, generating a notably less vociferous response from participants.

The discussion has challenged the seemingly inconsequential use of primary colours, exposing their role in coating the model with a veneer of childlike innocence. Links have been made between colour, gender stereotyping and power in an attempt to understand participant interpretations. It is now apparent that primary colours are in fact not innocuous, innocent or inert. The inherent, unconscious connection between

colour and meaning, in particular between red and strength, power and dominance may explain some important research findings.

The Insights Discovery model, via its use of colour, has the potential to feed on and tap into our historical make up and draw on assumptions and meanings that remain outside our consciousness. The Insights Discovery model therefore can be said to unite elements of gender stereotyping, discrimination, power and colour in a way that produces a potentially powerful and influential tool. This will be further discussed in Chapter 10: Issues and Implications.

This chapter therefore addresses and specifically contributes to the research questions;

- What are the implications and consequences of using the Insights Discovery tool?
- How can the distinctive power and influence of Insights Discovery be explained?

## **9. A summary of the findings**

### **9.1 Introduction**

The following chapter will collate and summarise the findings according to the three key themes identified from the empirical data; Stereotyping, Power and Colour (as discussed in the previous three chapters). It is an important addition to the thesis, as it provides an opportunity to make interpretations and linkages, and to draw out and describe key issues being discussed by participants.

Analysis and discussion of the findings has inevitably involved personal perceptions and conjecture in deciding what to texts to select and how to interpret and order them. It is important to stress that any explanations and assumptions are of my own construct and are a product of my own sense and meaning making. The aim throughout has been to be faithful to the participants and to be aware of the effect of my own personal biases in the editing process.

Chapters 6, 7 and 8 related the findings to previous research and literature. In this chapter however I have brought together direct participant quotes - both 'soundbites' and more extensive extracts - to illustrate points, and interspersed them with narrative, enabling further 'intrusion' into the study.

It is important to note that despite the extracts being separated under the main heading of Stereotyping, Power and Colour and divided under sub-headings, their placement is entirely subjective and does not suggest each issue exists independently. For example, the majority of quotes under the heading Stereotyping could have equally fallen under the heading of Power or Colour. This challenge clearly points to strong linkages between themes and demonstrates a supportive co-existence in which it could be said that each issue exacerbates the other.

### **9.2 Stereotyping**

The tables below brings together extracts from the empirical data in order to make interpretations and linkages, and also to describe and summarise key issues raised by

participants in relation to the stereotyping theme. Quotes have been divided into sub-headings, which have been worded with no other intent than to give a general explanation of the grouping.

**Colour energy labels and their consequences:**

*"We did an exercise on the workshop which asked us to build up a check list for each colour energy. Clues about body language, verbal signs and environment. When it came to my colour energy which was green – it was all about being sensitive, a shoulder to cry on, plants, drinks, tissues, showing them you care etc. It was a big laugh but suddenly it felt like I was being typecast as my mum – doing a typical women's role - making coffee, taking care of everyone and wearing my heart on my sleeve. Not really an image I want to have with my colleagues. I don't think it did me any favours."*

*[Jennifer, Participant, Organization C]*

*"The Managing Director from Organization C contacted me following an Insights Discovery Session I had run for his senior team. He was concerned that one of his female managers was "too red" for her HR role. In short she was not 'feminine' enough for the role. A lengthy discussion followed to alleviate his worries. Shortly afterwards I found that she had been moved out of HR into a Logistics role more suitable for her masculine traits."*

*[Rachel, Freelance Insights Discovery Facilitator]*

*"I once worked for a female manager who had been drafted in externally to lead a big project we were working on. She was certainly about as red as it gets .....*

*This [Insights Discovery] definitely gave her ammunition to use against us. I really think she used the information to target the 'weaker' ones – in particular the more sensitive greens and yellows.... There is no doubt that discrimination was going on within that project team... it wasn't even hidden. We all knew it was there but daren't speak up because she was so overpowering and aggressive.. and her managers overlooked it because they had brought her in and she was getting the results they wanted."*

*[Susan, Participant, Organization A]*

The stories above illustrate how the colour energy stereotypes began to emerge during the Insights Discovery workshop and the immediate impact this had on participants. The potentially damaging effects of an unwanted 'label' appear to have been realised within that very moment. The longer term consequences are also apparent as the stereotypical image of the red colour label impacts directly on participants' job roles and career paths.

There is evidence in these extracts of the links between Insights Discovery colour energy descriptions and male/female gender stereotypes and there are suggestions that subtle sex discrimination is taking place as a result. The giving of labels highlighted differences which were then used to reward some categories and punish others. In other words, some employees were discriminated against purely because of their colour energy label.

**Neutral language or gender abuse?**

*"I made a bit of a daft comment in a team meeting – nothing earth shattering – but my manager said 'are you having a yellow moment or what?' and everyone laughed. It was done a jokey way but everyone knew what it meant. I was being told I was ditzy - a stupid woman - and I felt completely humiliated. A couple of colleagues have said it to me a couple of times now and I think what's the difference between calling me a dumb blonde and saying 'she's being yellow again'. It may be different words but the meaning's the same...it's undermining and degrading ...I doubt very much that would have been said if I was a man.." [Deborah, Participant, Organization B]*

*"..... someone else in the meeting said "Oh, just let Ben do it – he's red so he'll enjoy ruffling a few feathers". I looked at Ben knowing that he would go in and get the job done, but that would stir up lots of trouble and resentment in the process. Unfortunately his 'redness' trumped my greenness. If I didn't think I was capable, I wouldn't have offered to do it. In that moment, I was totally undermined because of my colour energy and maybe also because I'm a woman." [Jennifer, Participant, Organization C]*

These stories challenge the neutral, inoffensive language of Insights Discovery and illustrate how colour labels can be used as a means to insult and degrade individuals. Indeed the extracts suggest that the harmless language of Insights Discovery may be used to conceal gender related abuse and sex discrimination. The parallels between the red/blue colour energy descriptors and the male gender stereotypes and green/yellow and female gender stereotypes emerge in these accounts. There is also inference that male traits are considered preferable in Organizations B and C where are female traits are not.

### **Fitting in with the dominant culture**

*"The workshop reiterated to me that my style is so much at odds with senior management here. I'm definitely not in tune with the military approach which seems to be flourishing. It feels like an 'alpha male' company and I'm too girly to really fit in with the guys. I knew this before, but coming out as green has conveyed it in big flashing lights to everyone else."*

*[Barbara, Participant, Organization C]*

*"My manager told me that I had to big my achievements up if I ever wanted to be promoted. She said 'Lisa's done a piece of work not nearly as good as yours but she's been going round telling everybody how good it is, making a big deal of it and that's what gets you noticed. It's alright not wanting to show off and sit in a corner being all green and sensitive, but if you don't tell anyone what you've done, it could be fantastic but no one will know. You need to be more confident and sure of yourself. Go out there and sell yourself.'"*

*[Susan, Participant, Organization A]*

These stories contest the pro-diversity rhetoric of many organizations and highlight the participants' perceived need to fit with the dominant culture. These accounts appear to suggest that both Organizations A and C favour male traits and therefore point to a 'male-dominated intuitional culture' within which participants need to exhibit male traits in order to 'get on'. The tensions experienced by participants who are on the receiving end of 'sex bias' and the pressure felt to conform, causes them serious anxiety and stress.

### **Hiding behind the stereotype**

*"Insights Discovery has helped me realise that being direct and to the point is just the way I am. Now, if people get upset because I say it like it is, I just think...ok, you're not red so you don't like it – that's the way it is... tough...get over it.."*

*[Robert, Participant, Organization C]*

*"I've spoken to a few people who have done Insights and some of them seem to be using it as a bit of a joke and an excuse for not wanting to work with other people or adapt their working styles."*

*[Joanne, Participant, Organization C]*

These excerpts highlight yet another consequence of stereotyping – attribution ambiguity. In these cases participants treat any negative feedback as attributable to their label and not their behaviour. They believe their behaviour is beyond reproach and so use their colour energy as excuse and a shield to hide behind. In this case, the red label is used to vindicate bad behaviour, but labels can equally be used as self-imposed barriers – excuses to not get on with certain people, account for lack of progression and reasons why failure is inevitable.

### 9.3 Power

The following table brings together extracts from the empirical data in order to make interpretations and linkages, and also to describe and summarise key issues raised by participants in relation to power.

The heading of Power has been divided into sub-headings, which have been worded with no other intent than to give a general explanation of their grouping.

As previously explained in regards to Stereotyping, placement of quotes is entirely subjective and does not suggest each issue exists independently of each other.

<b>A surveillance tool used to rank and grade employees</b>
<i>“... it has been used as a tool to segment people and show superiority.” [Margaret, Participant, Organization F]</i>
<i>“... You could visibly see her gloating when she came out red. Basically it gave her a crown and a robe and in her eyes it totally validated her role and management style.” [Linda, Participant, Organization B]</i>
<i>“... It was treated more like a competition, with the Red personalities being deemed “the best”. We had one Yellow person in the group who got laughed at and called a clown. For the purpose of the next exercise (come up with an idea for a carnival) somebody had to be forced to work with the yellow person to try and even out the numbers. Nobody wanted to be seen as introverted or “boring” so a few people just followed what the majority did. Circling the words that fitted with your personality</i>

*was a bit of a pointless exercise because people chose the words based on the colours knowing that they wanted to be seen as the 'best' colour."*

*[David, Participant, Organization F]*

*"When our team went through Insights the predominant message was that all the colour energies were good – no one was better or more important than the rest. What was important, was to have a good mix of all the different colour energies in a team or organization....Unfortunately the excitement soon wore off when I realised that it was all a sham. It still wasn't good enough to be green and stay green and there was certainly no feeling of equality between the colours. In no uncertain terms if you want to be successful here you have to shout about your achievements and be 'loud and proud' – all things I'm not good at and am definitely not comfortable doing.."*

*[Amy, Participant, Organization A]*

*"I got very emotional about the whole thing. I felt vulnerable and unbelievably sensitive about the feedback I got from other people – some of which was good, but some I thought was bad. It really upset me and I thought a lot about it afterwards."*

*[Jessica, Participant, Organization D]*

*"So I came out as yellow/green and all the other managers were red and blue. I suddenly felt like they were all looking at me and questioning whether I was management material. I even began to doubt myself. I could almost hear them saying 'she's such an airhead, no wonder she makes a mess of things – she's got no focus, no attention to detail..' I felt like they were all swooping round me like vultures, constantly watching and waiting for me to trip up so they'd know I wasn't the right person for the job."*

*[Chloe, Participant, Organization C]*

*"In the same way I felt they were judging me, I started to judge myself – finding faults and picking away at my self-confidence. I'm my own fiercest critic and worst enemy all rolled into one."*

*[Chloe, Participant, Organization C]*

*"One particular element that was unethical in my opinion is the fact that large groups of people undertook the insights discovery at the same time, in the same room. There were about 10 people per group, but then there have been in excess of 20 groups taking the course.*

*I found it unethical that results were shared with others. The groups were all asked questions at the same time, in front of their peers. This, in my opinion, does not develop the right climate for honest answers. Doing something like this needs to be undertaken individually without others around who can influence selections."*

*[David, Participant, Organization F]*

*"I actually wasn't interested in going to the workshop. I don't like all that talking about feelings etc. I also didn't want to be in a position of having to share personal information. Information about me is just that – personal... Anyway because everyone else in my team was going I felt like I had to. Not only did I have to go along but I also ended up having to read out and share things from my profile I didn't want. I wonder what would have happened if I'd have said no, I'm not doing it? Probably everyone would have looked at me and thought I was a weirdo and work relations would be strained and awkward after that."*  
[Joseph, Participant, Organization C]

The collection of experiences above highlight the way that the use of the Insights Discovery model results in the segmentation and categorisation of participants. The power of the colour stereotypes is evident in the perceived ranking of colours and the desire expressed by many participants to be red. Again the female green/yellow traits appear to be suppressed by powerful male/red traits domination.

The power of the model appears to be exacerbated by the act of sharing the very personal, intimate information contained in the Insights Discovery profile. As participants become exposed to the scrutiny of managers and colleagues, they experienced feelings of vulnerability and anxiety, and come under pressure to change and conform. It is interesting that not only were participants judged by others on the strength of their Insights Discovery profiles but also began to self-judge. The consequences of this on their self-esteem and confidence were perhaps equally as damaging in terms of career progression, as were judgements made by the organization.

**Desire to fit in – mirror organizational norms**

*"the trainer plotted participants on the Insights wheel by asking them a series of questions and getting them to move and stand according to their answers. We were then told what 'colour' we were. This was only a very brief overview of Insights and it did not go into any depth.  
All the Product Managers seemed as though they had to be 'Red' in order to justify their roles within the business. 100% of them came away stating they were as red as it gets – my opinion on this is people wanted to fit in and be seen as a 'Director'"*  
[Margaret, Participant, Organization F]

*“When people had been on this course, they came back into the office and bragged about how they were ‘Red’. They even competed on how ‘Red’ they were as though the more red you were; the better you were as a person. Having undertaken a full Insights appraisal, I can highlight certain qualities in individuals and feel I could roughly know what individuals would be on the wheel. However there were individuals who undertook the Insights plotting and to me clearly rigged the results so that they would be red, and would fit in with the masses. One individual is to me as sunshine yellow as they come. They are not decisive, fiery, or competitive, but judging by how red they came out as, you would expect them to be really assertive and confident – not at all like their true personality.”*  
*[David, Participant, Organization F]*

The stories above again show how the model was able to illuminate the traits classed as valuable by the organization. The powerful red/male traits again show themselves as being dominant in the organization. When allowed to ‘choose’ their colour energy, participants had the opportunity to prove to the organization they were in possession of these valued traits and therefore deserving of their role and future promotion. In this way the Insights Discovery model was able to ‘root out’ hidden, but powerful, organizational stereotypes and expose the desperate desire of employees to ‘fit’ with their ‘think manager- think male’ beliefs.

### **Judgement and Decisions**

*“Since the presentation, those who have been on it have now taken it upon themselves to judge and box all those in the office with what colour they are. Considering they have not done the complete Insights Discovery programme, they have come back experts on the topic, and are able to pick people out instantly. There have also been some jokes made towards those who were not red. For example, a guy who sits near me in the office was found to be a blue. All the other managers now make a joke of them being a blue and it clearly gets to the individual.”*  
*[Margaret, Participant, Organization F]*

*“My manager had a quiet word with me about my Insights profile – I came out as red – and he was worried that it didn’t fit with my HR role. Apparently I wasn’t empathetic and supportive enough. Following the workshop he’d put two and two together with some feedback he’d had and decided it wasn’t the right role for me. All my successes and things I’d done well seemed to have been forgotten in light of this new and compelling information. I loved working in HR and wanted to stay – I did try to change my approach as we were told in the workshop but the label stuck.*

*I've now been moved to a logistics role.”  
[Dorothy, Participant, Organization C]*

*“I have a senior role with a lot of responsibility. I am proud of what I do and I think I am respected within the organization. In the context of Insights Discovery I came out as green - someone who is passive, not very driven and results focussed. I feel like this has caused tension between the dynamic manager I thought I was and the meek and mild person I really am inside. It's made me question a lot and I feel a bit like a fake now.”  
[Carol, Participant, Organization D]*

*“I'm yellow, so it means I just can't handle detail.”  
[Becky, Participant, Organization D]*

*“I'm embarrassed to be blue – you've got to be strong, speaking out and making decisions here, not quiet and standoffish”  
[Joanne, Participant, Organization C]*

*“One person said to his direct reports ‘The point of the workshop was for me to adapt my style to become a better a manager but I'm a red so you'd be best adapting your styles to fit in with me”.  
[John, Participant, Organization C]*

This collection of experiences highlight how Insights Discovery can be used to gather information about participants which can then be used to make decisions about their suitability for certain roles and fit with the organization. The consequences of this range from office ‘banter’ through to moving employees to roles more commensurate with their colour label.

Extracts also demonstrate how the Insights Discovery model prompted individuals to make judgements about themselves and others. It appears that some individuals used the information to decide what they could and could not do – what roles they would be successful at and ultimately to make career choices. These were self-imposed decisions that appeared to be influenced by a colour label that either created or resonated with pre-existing self-doubt and insecurities. The power of the Insights Discovery model is therefore highlighted in the potentially life changing assumptions it provoked.

*“Insights is a useful model – it’s engaging and it produces some good information. By looking at the team colour wheel I can quickly see where everyone’s strengths are and who’s going to be good at doing what.”*  
*[James, Participant, Organization B]*

This short comment made by a manager in Organization B may appear on the surface to give a positive account of Insights Discovery. However, it masks a very worrying lack of understanding about the model. Insights Discovery states clearly that colour energy preference is not about competence, rather it simply describes someone’s behavioural preferences. In this case the manager mistakenly believes that colour label stereotypes can be used to indicate individual’s potential performance in certain roles. The resultant impact on both the individual and the organization concerned are self-evident.

**Positive personal development tool**

*“It was like having the wool removed from my eyes! A real eureka moment! I knew what I needed to do and felt fired up to do it!”*  
*[Michael, Participant, Organization B]*

*“Insights Discovery is a great tool. It has been a huge success, everyone is keen to use it and the feedback is always positive.”*  
*[Ann, HRD Manager, Organization A]*

*“.. it’s doing its job. The staff love it and we are learning more about each other and what makes us tick”*  
*[Stephen, Finance Director and Commissioner, Organization B]*

*“One of the supervisors had to deal with a situation that had the potential to be tricky and maybe even confrontational. He asked me to go along as an HR advisor but I didn’t need to get involved. There was a marked change in the way he handled the situation – he was sensitive and thoughtful, really empathetic – something that he would never have been before Insights Discovery. I don’t think he’d realised how well he’d done and how much his approach had changed.”*  
*[Julie, HR Advisor, Organization E]*

*“It was amazing, a real eye opener - I realised that being the same with everyone wasn’t as good as I thought. Having some time out to reflect really made me think about how I came across to other people.”*  
*[Mark, Participant, Organization A]*

*“Since working here I have never properly spoken to my manager. The week after the workshop I made the effort to sit down with her. I told her about the workshop and we discussed my profile. It was only half an hour but I think we understand each other a bit more now.”*

*[Thomas, Participant, Organization E]*

*“I suddenly realised why my relationship with some people in my team were strained and difficult. After the session we talked about Insights Discovery in our team meeting and made a poster showing the best way of communicating with each other. It’s a year now since the workshop but we still have it on the wall – it’s a good reminder of what to do and what not to do.”*

*[Mary, Participant, Organization B]*

These accounts paint a picture of Insights Discovery as a powerful personal development tool, which comes as a welcome contrast to the extensive critique which has gone before. The model clearly presents an opportunity for self-reflection and demonstrates the potential to act as a helpful catalyst for change. Participants describe how Insights Discovery had instigated a developmental process which had resulted in a positive improvement in relationships with others and a greater self-understanding.

#### **The importance of organizational context and approach**

*“If a director hadn’t been involved in this it would have been forgotten by now for sure. Because he has been behind it, using it at different team events, encouraging us to share our preferences by putting them on a shared drive, posters on our doors, colour cards on our desk etc. it has made it into a big deal. Because we’re all using it, it’s becoming just a normal part of the way we work.”*

*[Andrea, Participant, Organization B]*

*“The Insights model was good and it did make me think. However because it happened on day one and there was so much other stuff going on in the programme, it did kind of get lost in amongst everything else.”*

*“I liked the Insights Discovery model and the way it was about me. Yes, it did make me think about how I could talk to people differently.. but thing is that as soon as I got back after the course I had to hit the ground running, trying to catch up with everything I’d missed. It soon got forgotten then – although I would like to read the profile through again when I get time.”*

*[Richard, Participant, Organization E]*

The stories above link back directly to discussions relating to how learning happens in organizations, discussed in Chapter 2. The extent to which Insights Discovery has positive or negative consequences for participants is clearly linked to the commitment of the organization, the buy in of senior managers and the enthusiasm of key stakeholders. The importance of the organizational context is therefore of extreme consequence, and these variables are discussed at length in Chapter 5.

## 9.4 Colour

The following table brings together extracts from the empirical data in order to make interpretations and linkages, and also to describe and summarise key issues raised by participants in relation to colour.

As previously explained in regards to Stereotyping and Power, placement of quotes under this theme is entirely subjective and does not suggest each issue exists independently of each other.

<b>Red is best</b>
<p><i>“There is definitely a perception that ‘red is best’ around here. It’s like a not so secret society. Knowing glances and approving looks when some say they’re red. For me it just confirms that that you’ve got to be dominant and bolshie to get on.... Because it reflects the general management style, the bosses look at the reds coming back from the sessions and it’s like they’re saying ‘well done son – you’re one of us.... ‘ I personally feel like as soon as I know someone’s red I want to stay well clear of them and keep a safe distance.”</i></p> <p><i>[Chloe, Participant, Organization C]</i></p>
<p><i>“reds generally seem to have more respect. You get better thought of for being abrupt and curt than for being nice and caring – people fear getting on the wrong side of them. My manager is red and her comments can sometimes be quite hurtful and cruel. She thinks she is always right and any other opinion is wrong.”</i></p> <p><i>[John, Participant, Organization C]</i></p>

*“In effect the Product Managers chose to be red by deliberately answering questions to get them there. They seem to think that the more dominant, assertive and confrontational they are the better.”*

*[Margaret, Participant, Organization F]*

The power attributed to the red colour energy is strikingly apparent within these extracts. The level of emotion and passion expressed by participants relating to this label resulted in Chapter 8 specifically discussing the colour red. Links between the colour energy descriptors, the male gender stereotype and leadership traits perhaps explains why the response to red is so vehement and strong.

## **9.5 Concluding remarks**

In this chapter, I have summarised the findings according to the three key themes identified from the empirical data; Stereotyping, Power and Colour. The fusion of direct participant quotes and narrative has enabled further insight into the study, allowing interpretations, linkages and key issues to emerge.

It is clear from this summary that the themes covered are not discrete or isolated in their existence. It is similarly apparent that the issues of stereotyping, power and colour are co-dependent, interwoven, feeding off and into each other. As a result, the materials, discussions and assumptions included in the themed chapters may appear to overlap at times and certainly direct quotes taken from the empirical data could have been used in any and all of the themed chapters. It is again important to stress that any explanations and assumptions are of my own construct and are products of my own sense and meaning making.

Chapter 10 now points to implications or ways forward which make sense given the assumptions made. It does not aim to draw firm conclusions that would suggest a finality and surety not appropriate for this research, but rather it offers possible, tentative explanations, meanings and interpretations.

## **10. Issues and implications**

### **10.1 Introduction**

The purpose of this closing chapter is to point to implications or ways forward which make sense given the interpretations and assumptions made. It does not aim to draw firm conclusions as this would suggest a finality and surety which is not appropriate for this research.

The thesis set out to explore and present findings on the consequences and repercussions of using the Insights Discovery model as an organizational development tool. It sought to explore the conflicting purposes and values associated with this psychometric tool and discover how its use is rationalised, vindicated and proliferated within organizations. A key goal was to make a contribution to the literature and to knowledge, considering the wider implications for HRD practice and opportunities for further research.

My aim in this research was not to validate the Insights Discovery model or prove if it 'works' or not, rather it was to carry out research from a social constructionist perspective, uncovering individual interpretations of the learning intervention, viewing them through a critical lens, within the boundaries of my conceptual framework. It is important to reiterate at this stage that everything that has been said throughout this thesis has been of my own human construction. As Guba and Lincoln conclude, "the reader cannot be compelled to accept our analyses, or arguments, on the basis of incontestable logic or indisputable evidence; we can only hope to be persuasive and to demonstrate the utility of position" (1994:108).

Although much had previously been written about Insights Discovery in terms of validation and promotional material, surprisingly, investigation suggested that little academic research had been carried out into the implications and consequences of its application. These important areas were not fully understood and Insights Discovery

practitioners and HRD professionals did not therefore adequately know how to deal with what followed.

The lack of academic critique of the Insights Discovery model presented a significant issue. The model is widely used and acclaimed by its supporters, yet the following assertions have previously gone unchallenged;

- Simple: easy to understand and remember, so everyone can apply what they learn.
- Universal: they speak to everyone – your whole organization will be captivated by the Insights’ magic.
- Deeply Insightful: they take you places that you never expected.
- Positive: our supportive language is so engaging it empowers people to change.
- Fun! Energetic and vibrant experiences that create real excitement.

(Insights, 2015)

This view is confirmed by advocates who enthusiastically support the model.

“The Insights Discovery language has swept throughout our organization because it is fun to learn, inspirational to experience, easy to remember, effective and practical in application”

Katrina Dunkley, Former Head of leadership and people development, BT Wholesale (Dunkley, 2015)

This thesis has sought to unpick these claims by giving a voice to participants, thereby uncovering the multiple versions of reality concealed behind the promotional facade.

In order to validate the thesis as having satisfied its aim, this chapter considers each research question in turn, including a discussion on how this research makes a contribution to the literature and to knowledge. Finally, it considers the implications for practice as well as enunciating further research. In doing so, it addresses the research questions;

- What are the implications and consequences of using the Insights Discovery tool?
- How can the distinctive power and influence of Insights Discovery be explained?
- How can learning from the delivery of the Insights Discovery tool inform other HRD interventions?

## **10.2 Research question: What are the implications and consequences for individuals and organizations of using the Insights Discovery Tool?**

This research question has been a major focus of the thesis, which sought to examine the empirical material through a phenomenological methodology, focussing on individual experiences and their relation to the intervention. The goal was to describe the 'lived experience', looking beyond the taken-for-granted 'truth'.

Although pure phenomenological research seeks to describe rather than explain, and starts from a perspective free from hypotheses or preconceptions (Husserl, 1970), this was not a realistic option, and I have emphasized instead how interpretations and meanings have been placed on my findings, as well as making myself visible in the 'frame' of the research as an interested and subjective actor rather than a detached and impartial observer (Plummer, 1983, Stanley and Wise, 1993). This position has formed the foundation of my research and Chapter 3 sought to scrutinise my own role in the process, my personal framework of concepts, expectations, and theories. Exposing my own pre-conceptions and becoming aware that the outputs of my research are all products of my own assumptions, thoughts, beliefs and biases were important considerations.

Critical analysis of the empirical data and reflection on my own observations, allowed examination of the five case study organizations and showed that at a rhetorical level, there is a similarity as to the supposed role of the tool in regard to achievement of organizational goals and achievement of organizational benefits.

Similarities emerged between Organization A and Organization B, who openly aspired to becoming 'learning organizations' and used the Insights Discovery model to augment their liP award and other badges of success – matters of strategic importance in retaining their award winning image and customer confidence. Indeed the desire to raise the visibility of learning and development within these two organizations appeared to have had a profound impact on how Insights Discovery was used. The enthusiasm and drive of the programme sponsors, married with high profile promotion and positive storytelling, correlated with the uptake, transference back into the workplace and promulgation of the model. (Transfer of learning is discussed further in Chapter 2.) If personal and organizational learning is measured by prolonged and widespread physical and spoken reference to Insights Discovery, then it could be said to have occurred in these two organizations.

At Organization D, the model was used as part of a management development programme which was aligned to corporate objectives, in so far that it supported Organization D's self-actualization agenda; 'We support our staff to strive for excellence and to be the best they can be'. The programme as a whole, demonstrated to the outside world that it was building management capability as required by the liP award. It was interesting to note the paradox between the Chief Executive's aspirational humanistic discourse 'we want this to be a place where people love to work' and the strategic drivers for the programme i.e. the collective development of management and improved management processes. Similarly at Organization C, a gap was apparent between the humanistic 'family' values expressed on the website and the behaviourist HRD philosophy evident in the goal to align managers and develop a common corporate culture in pursuance of essentially organizational outcomes. Participants perceived this, in the main, to be a legitimate and desirable goal, impressing on their minds organizational values and identities in return for the 'promise' of career advancement. The idea that the organization were looking for 'square pegs in round holes' was an intention voiced only in private by senior managers and withheld from participants.

In the case of Organization E, the programme was unashamedly a management development initiative aimed at changing supervisor behaviour, aligning the group with

management and improving performance. It was noteworthy that despite initial positive responses to use of the tool in Organization E, Organization D and Organization C, personal or/and organizational learning from using Insights Discovery was not guaranteed. Whilst some participants felt it had added value and helped them to reflect on their own personality and style, there were no other visible indications to suggest that changes had occurred at an organizational level following its use. These findings align with Antonacopoulou (2001) who suggests that although the relationship between training and learning may appear strong on the surface, it may be superficial and mechanistic. She reports that the more learning interventions are focused on developing the organization at the expense of individual development, the more likely it is that learning will only play a superficial part in the process (Antonacopoulou, 1999).

At Organization D and Organization E the tool had been used by 'accident' as part of a bigger management development programme proposed by the Business School. Here it generally received an inert response, being an item of interest but generating no real outcomes, either positive or negative. Some positive personal stories came to light, but in the main these organizations were unresponsive and did not engage with the model beyond the realms of the workshop. This appears to correspond with the view of many academics that although organizations see training and learning as synonymous, one does not automatically lead to the other (Argyle and Smith, 1962, Thomason, 1988, Harrison, 1992, Ashton and Felstead, 1995, Antonacopoulou, 2001).

At Organization C, it was clear that at some point in the eight years this programme has been running, the model was seized upon as a 'means to an end'. Senior managers recognised that it provided a useful way to rank and grade employees according to their personality traits. This presented what was taken to be a fortuitous opportunity to spot those who did not 'fit' with the culture of the organization. The Insights Discovery model therefore emerged as a functionalist, panoptic tool used by HR/HRD to gather knowledge and power with which to 'punish' and reward employees, for example those with red colour energy preferences were identified as having leadership potential and those without it were deemed less able to handle management responsibilities.

It is interesting to highlight differences and draw parallels between the experience of employees within Organization C and Organization F (an organization which was not technically part of this study but from which participants came forward to offer their thoughts and input to the research). At Organization C the model had been delivered in accordance with Insight Discovery guidelines however at Organization F it had not; no personal profiles had been generated and the model was not fully explained to participants. Instead individuals were led by questioning to identify their preferred colour energy. As with Organization C, it seemed that senior managers at Organization F recognised its potential to classify employees and identify people with 'desired' attributes. Some employees also appeared to have recognised the potential to use this tool as a way to 'reinvent' themselves as a product they believed was more desirable to the organization. Although no one overtly admitted to deliberately choosing to be labelled with a particular colour energy, it is suggested that this had happened, especially within Organization F, when no formal process had been carried out to determine colour preferences and the opportunity to manipulate the outcome was presented. Other participants voiced that the need to be seen to display certain traits was imperative in order to 'get on'.

Although Insights Discovery claims that "there are no opportunities for bias or boxing in the Insights system!" (Insights®, 2012) the model undoubtedly provides a means of segregation which can be readily exploited on varying levels of consciousness. The inherent desire of humans to categorize leads to stereotyping in a variety of guises. It is questionable from a social constructionist perspective, where truth is a construction of the moment (Cunliffe, 2008), if it is even possible to demonstrate the existence of personality as a unified or stable aspect of an individual and from this viewpoint, the model is therefore exposed as a paradox – on one hand referring to the unique individual, whilst at the same time labelling participants as one of four colours.

It is clear that stereotyping had a damaging effect on some employees. Their exposure and vulnerability was apparent as the tool highlighted and justified pre-existing stereotypes and biases within the organization. Segregation of personality types resulted in varying levels of discrimination, with some colour energy members becoming

'heroes' and treated preferentially whilst others were 'demonised' and punished. Sometimes this punishment took the form of being viewed unsuitable for certain jobs or promotion, and at other times ridicule or isolation was imposed by other team members.

Perhaps most concerning was the implicit link between colour energy traits and gender stereotypes. Traits of red/blue are those typically associated with masculinity and traits of yellow/green those typically associated with femininity. In fact the parallels between the two were so strong that the labels could have been interchangeable. These connections led to unhelpful comparisons between men and women, male and female traits and highlighted the existence of closeted sex discrimination which undoubtedly would have been vehemently denied by all the organizations taking part in this study.

The 'feeling' yellow and greens were generally perceived as 'weaker' and not cut out for roles in management or leadership, mirroring the stereotypical view of women in organizations. In contrast the 'thinking' red and blues were seen as typically male, 'strong' and capable of leading others, making tough decisions and achieving challenging goals. The resultant prejudice experienced by some participants was in truth no more acceptable than any examples of sex discrimination, yet under the guise of the 'neutral language' of the Insights Discovery model, many remained unaware of the magnitude and implications of their words and actions.

This lack of awareness could perhaps be explained by the age profile of employees involved in the Insights Discovery workshop. Younger participants may not remember the days of overt sex discrimination experienced by some older colleagues. They may simply not be aware of the long history of inequality and discrimination experienced by women worldwide. Some may have unconsciously accepted the account of the equality and diversity rhetoric adopted by their organizations, believing that the playing field is level and women are viewed as equal with their male counterparts.

Under the spotlight of the Insights Discovery model, the male-female divide was exaggerated and in some instances the model appeared to deliberately counteract the aspiration of sexual equality and equal opportunities.

It is my view that implications and consequences for individuals and organizations vary as a result of situational differences and how the model is used. This is affected by the degree of enthusiasm and the importance bestowed on it by the sponsor, the HRM/HRD approach adopted by the organization, and the cultural environment in which the intervention exists. The importance of context and managerial support is discussed further in Chapter 2. Whilst it cannot be stated conclusively that the Insights Discovery model caused discrimination to occur where it did not exist previously, it may be concluded that in organizations where underlying bias and prejudice exists, the tool has the ability and the means to exacerbate and perpetuate the situation.

It can be argued from the empirical data that naive, unscrupulous or unqualified facilitators produced results which were ultimately damaging to the organization and employees (as in the example of Organization F). These findings support the functionalist view that HRD is concerned with resource maximisation, serving many stakeholders and degrading people to the same category as materials and money (Armstrong, 1999, Mabey, 2003, Oxtoby and Coster, 1992). Elliott and Turnbull (2004) stress the magnitude and importance of the HRD professional's role as the moral conscience of the organization, a responsibility that appears to have been wilfully ignored by deliverers in Organization F.

This does not however explain similar results in sessions I have personally facilitated. For example, despite facilitation in full accordance with Insight Discovery recommendations, the paternalistic, behaviourist culture infused with a military senior management style, seen within Organization C, led to an environment where employees were expected to 'fit in to get on'. Here colour preference brazenly led to segregation and evaluation, which was justified and deemed necessary because it was for 'the good of the business'. The Organization C management development programme served as

a cultural indoctrination and the Insights Discovery model became just another means of singling out those destined for success based on organizational fit.

Turnbull and Elliott (2004) highlight the increase of programmes designed to imprint employees with the values of the organization and bring about identity change. The Insights Discovery model is just such a transformational learning tool, encouraging participants to confess their false assumptions before going through the cathartic experience of owning up to them (Newman, 2014, Mezirow, 1995). The 'emotional stir up' (Allport, 1948) and 'psychological dynamic process' (Schein, 1996) are recognisable in the workshop environment and in the anxiety experienced by some participants. Although this angst is extolled by Yerkes and Dodson (1907) as an essential part of the learning process, Bardwick (1991) and White (2009) caution that it needs be managed carefully by the facilitator, creating a safe environment (Taylor, 1998, Schein, 1996, Loughlin, 1993, Boyd and Myers, 1988).

It is therefore my belief that the Insights Discovery tool does have the potential to bring about positive consequences for individuals if they choose to use it as a developmental, self-exploratory tool. Senior managers also have a choice to decide what 'positive outcomes' they want to achieve; they can decide to use the model to bring people together and improve relationships (Swanson and Holton, 2001, Aktouf, 1992) or as a means to identify employees so they can be ranked, graded and segregated and changed (Armstrong, 1999). The former has been shown to leave employees feeling motivated and engaged, whilst the latter has entirely the opposite effect. Choice is therefore the key word and programme sponsors and senior managers need to be made aware of the potentially damaging effects of the decisions they make.

This challenges the assumption that learning is "intrinsically good" (Woodall and Douglas, 2000:116) and "organizations that provide training and development are automatically perceived as virtuous" (Elliott and Turnbull, 2004:4). The findings support O'Donnell et al's assertion that "often unspoken agendas of power, exploitation and control..lay beneath the cosy, overly humanist and unitarist surface exterior of much HRD discourse and practice" (2006:4).

I therefore uphold the view that HRD professionals need to exercise extreme caution in using tools which can expose and change identity such as Insights Discovery. These tools must be treated as ‘a loaded gun’ – with diligence, care and the utmost respect. Firearm safety rules exist in order to avoid ‘negligent discharge’ or the consequences of weapon ‘malfunction’. Their purpose is to eliminate or minimize the risks of unintentional injury or damage caused by improper possession, storage, or handling. These are precisely the same reasons why safety rules must be developed and adhered to when using tools such as Insights Discovery.

### **10.3 Research question: How can the distinctive power and influence of Insights Discovery be explained?**

Despite Insights Discovery’s childlike qualities and ‘fun’ propaganda, the surprising and at times disturbing power and influence of the Insights Discovery model quickly became obvious during my research. The power of the promotional material circulated from Insights Discovery itself and the exuberant feedback from organizations who were enthusiastically using the model, was markedly apparent, not least in the negation of any formal evaluation.

Ackers and Preston spoke of management development participants who responded to the intervention with a “voluntary commitment that infuses the whole of the person’s life with new meaning” (1997:679). The religious conversion analogy is very apt and may explain the overwhelming eagerness commissioners had to promote the programme in their organizations despite no tangible measure of return on investment (Mabey and Finch-Lees, 2008:131, Turnbull, 2001).

The research has indicated that Insights Discovery has the potential to be a powerful and complex HRD tool. It allows the labelling of employees so that they can be ranked and graded, so that the organization can decide what the right job is for them or indeed if there actually is a job for them. There is also a suggestion that the model can act as a

catalyst in a transformational process which will align 'willing' employees to organizational goals (Edwards and Tait, 2000), producing 'designer employees' (Casey, 1995).

The Insights Discovery tool can be used positively - to engage employees and involve them in a process of self-exploration and development or negatively - in acts of disparagement and destruction. Its power can be wielded in many different ways. Power in the form of self-understanding can be given to an individual to help them to challenge their assumptions and self-perception. The model also provides the means for power to be bequeathed to one person whilst at the same time removing it from another.

The combined power of the model and the HRD function was such that employees who were uneasy about completing the test and sharing private information felt unable to refuse. The move to make identity public property and guarantee exposure across the organization therefore sailed through in an uncontested motion. This was particularly visible in Organization B who had made it 'the done thing' for everyone to share their personality profiles online with the unitarist aims of "being good for us all to get to know each other". The management considered this a best practice activity, however many staff privately felt uncomfortable with this level of exposure without any right of reply, no opportunity to unpick the underlying complexity and enter into meaningful dialogue.

This scenario reflects the focus on organizational interests rather than personal development. HRD is clearly seen here to be functioning on behalf of the organization and the distinction between individual employees and 'human capital' (Schultz, 1961) is clearly drawn. This is contrary to McGuire et al (2005) and Swanson and Holton (2001) who argue that humanism is central to the HRD field with its core emphasis on motivation. 'Human resources' is classed by Rhodes and Garrick as a "dead metaphor" (2002:90) asserting that "capital is the wealth that is employed in order to produce goods and services, and people become linguistically subsumed as just another form of capital" (2002:91). Employees are therefore relevant only in terms of their financial contribution to the organization - either a 'cost' or 'return on investment'. In this case

their right to protect their self-identity is over looked for the greater good of the business.

The accuracy of the profile can also account for its attractiveness and 'likability'. Participants revel in the fact that it is 'just like them' and many show disbelief that it has been produced from just 25 questions. Although Forer (1949) showed personal testimonials to accuracy are not a significant measure, it is argued that once we accept the validity of the model, our selective attention means we see information that confirms this view.

Power also emanated from the model's ability to reproduce and feed existing social and organizational stereotypes – in particular related to gender. These stereotypes exist in all organizations, sometimes masked behind rhetoric of equal opportunities and diversity, but nevertheless present, working behind the scenes, often unnoticed and entwined in taken for granted assumptions. The influence of these sex stereotypes frequently results in women (and men) being discriminated against, judged as unsuitable for senior, challenging jobs and effectively 'punished' for their feminine traits and characteristics. Indeed the undervaluing of softer 'female' skills and behaviours can result in those who are shown to possess these traits (whether male or female) being treated in a derogatory and discriminatory manner.

The profiles were clearly being used by some as an excuse as to why they should not attempt certain tasks. Others used their profiles to vindicate poor behaviour and justify why they could not help themselves acting in a particular way. For many the "the self-fulfilling nature of interpersonal expectations" (Rosenthal, 1987) can result in individuals believing and feeling controlled by their label, ensuring the label becomes a self-fulfilling prophecy (Merton, 1948).

The Insights Discovery model inevitably serves to objectify participants and highlight traits which expose the participant to criticism and judgement that could potentially make or break their career - in the case of women, presenting yet another barrier to their progress. Foucault's panopticon (1977) presents a useful analogy of how an

individual becomes open to scrutiny of others via a central organising mechanism. In this case, the Insights Discovery profile becomes a vehicle of 'panoptican' power when shared with others. The sharing of personal profiles saw an inert document metamorphasize into a powerful force, used by HRM and HRD functions to classify and control employees. This divisive practice and the awareness of constantly being watched, resulted in feelings of anxiety, fear and diminished confidence.

The Insights Discovery four colour model is promoted by its creators and followers as being simple and accessible. Its visual properties help it to be "easily understood and remembered, so everyone can apply what they learn" (Insights®, 2012). This is contrasted with other text based psychometric tools, such as MBTI, which are considered to be more complex and difficult to recall after the event. The reason for this simplicity is attributed to the use of colour rather than text. The primary colours appear to be inoffensive, innocuous, coating the model with a veneer of childlike innocence. However the research uncovered evidence to suggest that colour in itself is a powerful force. Colour influences performance and psychological functioning more generally via learned associations that may be embedded in taken for granted assumptions and evolutionarily predispositions (Jacobs, 1981, Mollon, 1989, Elliot et al., 2007).

In particular, the model's 'Fiery Red' colour energy produced vociferous and emotive responses and it is notable that despite the 'all colours are equal' rhetoric, a hierarchy of colours was perceived, with red being ranked the highest in terms of both status and power. Participants unequivocally believed they could be advantaged or disadvantaged depending on their colour energy preference.

Elliot et al (2010) has examined the biological and historical link between redness and high status observed in the animal kingdom and red and high status in our society . The societal use of red reinforces the biologically based use and extends it beyond natural bodily processes. Consequently, red may not need to be natural or observed on the body to be influential; artificial red displayed in close proximity to the body (e.g., red

clothing, a red background or even a 'red' classification label), may be sufficient to produce the status effect.

Furthermore, research investigating associations to colour words and stimuli has demonstrated that red is linked to strength, power, and competitive dominance (Little and Hill, 2007, Schaie, 1961). This is reflected in the Insights Discovery descriptors of the red colour energy – 'Competitive, Demanding, Determined, Strong-willed, Purposeful'.

It is apparent therefore that primary colours are perhaps not innocuous, innocent or inert. The link between colour and the power of the Insights Discovery tool has previously been unexplored. The inherent, unconscious connection between colour and meaning, in particular between red and strength, power and dominance, may explain my research findings. Hill and Barton (2005) suggest that the "red advantage" applies across a range of circumstances, and can perhaps account for the desire for employers to seek out red participants for leadership roles, the desperate need for some employees to be seen as having the 'red badge of honour' and for others to want to stay well clear of those who bear that label.

Start with labelling, segregation, exposure and control. Mix in ranking, gender stereotypes, sex discrimination and leadership traits. Throw in an 'accurate' and intimate personal profile and add pressure to share. Sprinkle with a childlike, fun veneer using primary colours and a neutral language, and perhaps we have the recipe for Insights Discovery's 'je ne sais quoi' – the thing that sets it apart from other psychometric tests and learning and development tools. It would appear that Insights Discovery has the potential to feed on and tap into our historical make up and draw subconsciously on assumptions and meanings that we do not even realise exist. The 'extra something' it possesses therefore, not only laces the model with danger, but also is the very reason that the Insights Discovery tool must be handled with extreme care.

#### **10.4 Research question: How can learning from the delivery of the Insights Discovery tool inform other HRD interventions?**

Turnbull and Elliott highlight the lack of research into the short and long term impact of change interventions on individual identity. They ask “ those involved in the design and delivery of HRD programmes to consider the immediate and longer term political impact of such programmes on other facets of their lives” (2004:199). The Insights Discovery workshop is one such programme and my research will therefore play an important role in attempting to bridge this knowledge gap.

Personality tests are omnipresent in the world and are generally recognized as standard, normative HRM/HRD tools. Insights Discovery is just one of approximately 2,500 personality questionnaires available on the market today. The predominant functionalist discourse surrounding HRM and HRD has resulted in these practices being taken for granted in organizational life (Turner, 1983). Willmott reports how organizations use such practices and exposes how corporate culture “endeavours to secure control by managing the impression of respecting the distinctiveness and individuality of each employee” (1993:526). This provides an apt description of the organizations in my study.

The similarity between all personality tests lies in the claim to reduce complex, chaotic individuals into a simple label. Paradoxically, although the Insights Discovery model and many other psychometric tests are based on the work of Jung (1921), he did not suppose that people could be permanently fitted into one category, claiming everyone is an exception to the rule and to label people would be nothing more than a childish game.

The construction of knowledge in HRM and HRD calls for "effective instruments for the formation and accumulation of knowledge-methods of observation, techniques of registration, procedures for investigation and research, apparatuses of control" (Foucault, 1980b:102). As an HRD tool, Insights Discovery seeks to shape employees and remould individuals to act in certain ways, bonding them to what are considered to be "appropriate" identities (Townley, 1989). Essentially, these tests function as a means of

measuring and evaluating individuals, rendering them calculable and manageable (Rose, 1988). The status of the individual and their right to be 'individual' and 'be who they really are', often gets lost in this process (Townley, 1989).

Attempts to harness the employees 'soul' for productive ends forms part of a long history of investigation into the inter-relationships between work psychology and management (Hollway, 1991). Barratt considers that practices such as self-development, competencies, involvement and empowerment are all designed explicitly to engage the "psyche of the employee" (2003:1073). Foucault (1977), cautions that the issue is not necessarily that individuals are repressed by the social order but that they are "carefully fabricated in it" as power penetrates into their behaviour. He recognized that, in order to obtain productive individuals "power had to be able to gain access to the bodies of individuals, to their acts, attitudes and modes of every day behaviour" (1980b:125). Acker and Preston (1997) asserts that if we respect people and their rights, there is something unethical about shaping the personality of an individual to suit the organization and expecting that organization to dominate their lives.

This perspective has challenged previously held views of HRD as fundamentally ethical and positive practice. Woodhall and Douglas contest the view that learning is an "intrinsically good or virtuous activity... and ...that organizations that provide the means for training and development are acting virtuously" (1999:249). My research upholds this view and confirms that any learning intervention has the potential to be utilised for iniquitous ends.

By adopting a critical management perspective (Alvesson and Willmott, 1996, Mabey and Finch-Lees, 2008) HRD is exposed as "vulnerable to the social and contextual process of power and control" (Woodall and Douglas, 1999:249). Challenging personal assumptions and taken for granted 'truths' is therefore imperative. For example, in the past my belief was that although participants found the sharing of personal information uncomfortable, it was 'for their own good' and for the good of the organization and so I have pressed them to 'open up' and be honest. This view has been forcibly challenged

in the light of the research findings, questioning the ethics and morality of facilitators who assume they know what is in the best interest of participants.

Turnbull and Elliott suppose that HRD professionals may well find uncomfortable the accusation that they “are tacitly supporting a hidden and unacknowledged agenda of organizational control” (2004:191). Ackers also suggests that whilst the ethics of ‘personality reshaping’ are distasteful and disturbing to some “the managerial exponents of ‘enlightened business self-interest’ still insist that the corporation cannot afford not to mould culture and people, and that society needs to have its way” (1996:695). Turnbull and Elliott’s calls for greater attention to be paid to the impact of identity shaping are rooted in the fact that “HRD practitioners have often found themselves at the helm of such initiatives, but frequently with little understanding of the impact they have on those who are targeted by them” (2004:191).

The short and long term impact of change interventions on participants is identified by Turnbull and Elliott as being under researched. “Much of HRD is concerned with identity shaping” (2004:191) and they ask “those involved in the design and delivery of HRD programmes to consider the immediate and longer term political impact of such programmes on other facets of their lives” (2004:199). For these reasons, the “implications of the identity-shaping role of HRD and the moral as well as social repercussions” warrant further investigation (2004:191). These powerful statements have acted as the foundation on which this research project is built.

The fact that HRD is involving itself in this field of personal change “places a heavy burden of responsibility and care on HRD practitioners designing such programmes” (2004:199). Considering the impact of the intervention on participants is therefore crucial ethically and professionally (Alvesson and Deetz, 1996).

The research findings support the claim that facilitators need to be equipped to deal with the emotional side of learning and the grieving phase that ensues when participants realise that their old patterns of thinking, perceiving, beliefs and values are replaced by new patterns (Baumgartner, 2001, Boyd and Myers, 1988). The possible dangers of transformational learning interventions and the role facilitators play in ‘opening

Pandora's box' are worthy of thorough consideration. Indeed Woodall and Douglas warn that the "tradition of ethical humanism present in earlier work on adult learning and organizational development can be undermined by developmental interventions designed to change culture and personal values" (1999:249). I now see myself as having 'thrown a grenade' into an organization before walking away.

The research highlights the difference in approach and philosophy between HRD and the organization – what it says and what it does. In doing so, it has raised many issues. Firstly, it has questioned the role of HRD in either serving the employees or evaluating and segregating them for the managers. Secondly it has challenged the ethics of HRD professionals in deliberately exposing personal identities and then seeking to change them.

Facilitators need to be aware of the potential dangers of using Insights Discovery and other such psychometric tools. Its use should be challenged in a responsible manner. Are there better ways for teams to get to know each other and improve relationships and communication? Warnings exist regarding the ease in which personality tests can be substitutes for observation and good management (Hayakawa, 1950, Melamed and Jackson, 1995, Lewis, 1999). Paul brands them as "nothing more than an alluring fantasy or perhaps wilful deception" (2004:221).

Perhaps a better approach would be to spend time with an organization beforehand to identify what stereotypes exist and discover exactly what they are seeking to achieve. The need for a thorough diagnosis before delivery, challenging the desired outcomes, is apparent, as is the need to ensure senior management are alert to the dangers and potential implications.

There is also a necessity for HRD professionals to challenge the 'red is best' notion and tackle organizational perceptions of what makes a good manager and leader. It is essential that tacit gender discrimination is exposed and challenged, and that genuine appreciation of softer, people skills and emotional intelligence is encouraged.

The 'cognitively represented ideal image of a leader' as discussed by implicit leadership theorists (Foti et al., 2012) reveals that the ideal leader prototype determines who we consider capable and worthy of the role and who we grant leadership to. Perhaps most ominously, it also controls to what extent individuals perceive themselves as measuring up to the leadership prototype and dictates whether they put themselves forward for leadership roles (Lord and Maher, 1991, Shondrick et al., 2010). These prototypes need to be confronted not just within organizations, but across the whole population.

McGregor recognises that personality tests and a manager's knowledge of an employee yield at best an imperfect picture. Psychometric tests "have genuine value in competent hands (1972:136), however competence in this case is about more than just accreditation by Insights Discovery. This research has prompted critical thinking about personal responsibilities as a learning and development practitioner and the ethical duty facilitators have to learners. Awareness has been raised regarding the ease in which we fall mindlessly into believing the 'hype' and promotional materials associated with some training tools. As Mumford (1997) cautions, training is too susceptible to flavour of the month. He advises HRD practitioners to ask themselves why the method used is more appropriate than any other method for a particular need, and if the outcomes to be gained are worth the cost involved.

Careful consideration must be given to the use of particular learning tools and the motives of those who specifically request them should be routinely challenged and debated. This should involve pointing out possible repercussions and insisting that senior managers and managers use the Insights Discovery model first – so that they fully understand it - its value and limitations – and appreciate the importance of making it an ongoing, inclusive process.

The ethics of deliberately selling learning interventions to clients in order to meet Business School financial targets has also been challenged, concluding that the two are not ethically compatible. The power of the seller in prescribing solutions to learning problems is high. "The choice of intervention is determined not so much by what the individual wishes, as by what the HRD professional perceives is needed or useful"

(Woodall and Douglas, 1999:250). Pressure to meet financial targets may mean that criticality is removed from the negotiation and that a less than perfect intervention is agreed upon.

The ethics of segregation (and possibly resultant persecution) is a practice I personally now feel very uncomfortable with. Singling out an 'ideal' type has disturbing connotations and the badging of individuals evokes unfortunate parallels with the Nazi concentration camp 'badges of shame' which, as seen in the Insights Discovery model, also had specific meanings indicated by their colour. These emblems helped guards assign tasks to prisoners, much the same as some managers use colour preferences to place employees: for example, a guard at a glance could see if someone was a convicted criminal (wearing a green badge) and was therefore likely to have a "tough" temperament suitable for supervising forced labour.

Respect for individual learners and the need for an ethical stance towards adult learning has been long upheld by HRD academics (Rogers, 1969, Knowles, 1989). The emphasis is on respecting individual dignity and upholding self-worth, developing the whole person through experiential and participative methods. French and Bell (1990) summarized concern regarding organizational development's (OD) disregard to freedom, privacy and self-esteem, the focus instead being on task accomplishment and commitment to organizational objectives. It may be possible therefore to conclude that when Insights Discovery is used as a HRD tool for personal development respect for the individual is emphasised. When used as an OD tool however privacy and self-esteem are easily sacrificed to meet the 'improved performance' needs of the organization. Woodall and Douglas relate that "individuals are treated in an instrumental and often unjust manner, and the purpose of development activity becomes the achievement of organizationally fixed competencies, rather than authentic individually determined needs" (Woodall and Douglas, 1999:252).

The real challenge is for HRD professionals to educate organizations to appreciate the importance of 'soft' management skills, looking beyond the diversity and equal opportunity rhetoric which masks many male dominated workplaces. In these

institutions, discrimination is concealed by a “cloak of equality” (Benschop and Doorewaard, 1998) and there is little awareness or consciousness of the hidden prejudice that exists. Considering implicit leadership theory, we need to rethink who and what makes a good manager. Perhaps then women will have fewer barriers to overcome.

### **10.5 How can learning from this research inform and contribute to HRD understanding and theory?**

In answering the research questions, this thesis contributes to knowledge in the following ways;

Firstly, it contributes to the field of critical HRD studies, by means of analysing and theorising an area identified by Elliott and Turnbull as being under researched i.e. the potential short and long term impact and repercussions of an identity shaping change intervention. “Much of HRD is concerned with identity shaping” (2004:191) and the authors ask “those involved in the design and delivery of HRD programmes to consider the immediate and longer term political impact of such programmes on other facets of their lives” (2004:199). For this reason, the “implications of the identity-shaping role of HRD and the moral as well as social repercussions” warrant further investigation (2004:191).

This research responds to this fervent call for investigation, raising consciousness and consideration of the consequences of using the Insights Discovery model by examining the emotions and well-being of those who participate in interventions with a powerful identity messages. In doing so, it serves to alert practitioners and those who instigate use of Insights Discovery within organizations to the possible implications of using the model - providing words of warning regarding, if, how and when the model should be used.

Secondly, it has brought together fields of existing knowledge not traditionally associated with the HRD research arena, for example gender stereotyping and the use of colour, to attempt to explain the power of the Insights Discovery tool and provide a possible explanation for its enthusiastic and ardent following. This discussion aids understanding by encouraging the formation of new links between hitherto unconnected areas, which may act as a catalyst for those associated with the model to reconsider and reflect on the possible benefits and repercussions of its use.

Thirdly, the research has explored the implications and consequences of using the Insights Discovery model. Exploration of the use of Insights Discovery in five case study organizations has enabled a rigorous examination of rich empirical data from the perspectives of three stakeholder groups; programme sponsors, participants and non-participants. Thorough analysis of interpretations and the meanings bestowed on the intervention, has made it possible to uncover the tensions and anxieties that emerged, as well as the complex and divergent interests and purposes of the stakeholder groups. Whilst these issues have been previously considered in regard to other HRD interventions, they have not been fully explored in the context of a psychometric tool such as Insights Discovery.

Holden and Griggs ask “If HRD practitioners are custodians of learning in an organization, is it our responsibility to equip them for this role...” (2010:706). I believe it is. The findings of the research provided tangible evidence to challenge the way HRD uses learning interventions within organizations, highlighting areas of consideration and concern and reiterating the critical role played by HRD professionals. The research indicates that HRD professionals using seemingly innocuous learning and development tools may be oblivious to the potential consequences and implications – not just for participants, but for the organization as a whole. For example, although it cannot be stated conclusively that the Insights Discovery model caused discrimination to occur where it did not exist previously, it may be concluded that in organizations where underlying bias and prejudice exists, the tool has the ability and the means to exacerbate and perpetuate the situation. The thesis therefore contributes to practice by drawing attention to the complexities of using transformational learning tools such as Insights

Discovery and cautioning HRD practitioners to be aware of the potential dangers and ethical issues involved.

In these ways the thesis supports O'Donnell et al quest to surface "the implicit, often unspoken agendas of power, exploitation and control that often lay beneath the cosy, overly humanist and unitarist surface exterior of much HRD discourse and practice"(2006:4). By examining the consequences of using the psychometric tool Insights Discovery, the research makes a strong contribution to theory by providing a rigorous analytical account of an area that appears to have been previously under researched.

Existing research in the field of psychometric testing in HRM/HRD areas is predominantly descriptive and normative, eulogizing the common-sense, taken-for granted, mutual benefits of such interventions. Conversely, this analysis of a psychometric profiling tool carried out in an organizational context, is conducted from a critical perspective and has sought to disrupt 'normalised' understanding and assumptions to reveal hidden meanings and critical insight which will inform the practice of not only HRD professionals but of those who instigate the model within organizations.

## **10.6 Research limitations**

It is inevitable that this research had its own limitations. The goal of interpretive research is to understand and interpret human behaviour rather than to generalize and predict causes and effects. Having said this however, although immediate claims are bound by the research group studied, generalisation is possible "where the reader is able to assess the evidence in relation to their existing professional and experiential knowledge" (Smith et al., 2009:4). My years of experience as an Insights Discovery facilitator have therefore enabled me to unpick the empirical data and make sense of multiple realities.

Phenomenological studies are generally conducted on relatively small sample sizes, the plan being to reveal something about the experience of each of those individuals. “The aim is to find a reasonably homogeneous sample, so that, within the sample, we can examine convergence and divergence in some detail” (Smith et al., 2009:3). My data gathering involved 25 semi-structured interviews and allowed exploration of similarities and differences between each case. I have also supplemented this data with information gleaned from informal conversations with relevant people during my involvement with the case study organizations.

Lester raises the issue that in a commercial or organizational setting the phenomenological approach is frequently misunderstood - “it can be hard to get over to people that a single-figure sample is valid - and there can be confusion between methods such as theoretical sampling, used to ensure that participants are drawn from a spread of contexts, and statistical sampling which is concerned with quantitative reliability and often with differences between contexts” (1999:3). It may be considered therefore that increasing the sample size would enhance the results, however Lester states this is a common mistake (1999:3).

Although the case studies have provided rich data from multiple perspectives, only five organizations were formally considered. Future research within a wider range of organizations could provide the opportunity to explore the issues raised further.

## **10.7 Future research**

There are many possible avenues of exploration which could extend this research. Some particular areas of interest would be;

- Research into the “implications of the identity-shaping role of HRD and the moral as well as social repercussions”. This is an area highlighted by Elliott and Turnbull as warranting further consideration. (2004:191).

- The prevalence of gender stereotypes within organizations leading to sex discrimination. This has been shown to have a profound effect on women and leadership, and warrants further research.
- Examination of the use of Insights Discovery in other organizations.
- Research into the longer term impact of Insights Discovery. Participant interviews were carried out over a two year period and therefore a longer term study would add a new dimension to the research.

## **10.8 Closing remarks**

From a very early age we are taught to stop and think before acting, consider the consequences of our actions, conceptualize alternative ways of responding and think about the impact of our behaviour on others. For many, this becomes an automatic response, something that happens without any conscious effort and perhaps because we assume this analytical process is our 'default setting' and always running in the background, we may be unaware of instances when it does not, for example when we blindly, without question, accept custom and practice and taken for granted assumptions. It is all too easy to fall into this trap, to accept the status quo and believe that if something is accepted as 'the done thing' over a long period of time it must be a beneficial and worthwhile activity. It is for precisely this reason that it is sometimes necessary to consciously stop, think and consider exactly what is happening.

There are many high profile examples of when we have been oblivious to the dangers of familiar practices. For most of the 20th Century cigarettes were marketed as healthy and positively good for both sexes. Images of rugged men appealed to male escapist fantasies and glamorous women were used to convince females that not only was smoking feminine, but that it was also empowering. The term "Torches of Freedom" was used to describe cigarettes as symbols of emancipation and equality with men, encouraging women to aspire to better lives. Celebrity endorsements for cigarette brands helped them gain popularity and even Santa was pictured smoking. Doctors were

keen to promote the health benefits of cigarettes claiming they could actually help with sore throats and coughs.

Although vague associations between smoking and illness were well known and appreciated, 'everybody did it' and the apparent benefits generally outweighed the concerns. It was not until Doll and Hill published a report in the British Medical Journal in 1950 that a link between smoking and lung cancer was suggested and later proved. So began the slow decline of smoking in the UK, and the placing of health warnings on tobacco products in 1971 saw a rise of general awareness of the dangers of smoking. Today we are fully aware of the dangers of smoking (and passive smoking) and are able to make informed decisions about the use of tobacco.

This may appear to be a strange analogy, but clear parallels can be drawn between the history of cigarette smoking and the use of psychometric tools. It may be said that psychometric tools such as Insights Discovery have developed and proliferated in a comparable manner. These tools have been marketed to organizations, facilitators and participants as beneficial, fun, innocuous, team building activities that can enlighten and liberate individuals, helping them perform better and achieve better results. The effects on passive bystanders caught up in the organizational aftermath are never actively considered. Testimonies from 'celebrity' global companies who use Insights Discovery such as IBM, Boeing, Microsoft, BP, Zerox, Merck and BT act in much the same way as did Hollywood endorsements and although some concerns have been expressed about the use of psychometric tests (Hayakawa, 1950, McGregor, 1972, Melamed and Jackson, 1995, Lewis, 1999, Paul, 2004, Pittenger, 1993) they are generally accepted as just another HRM/HRD tool with benefits that outweigh any disadvantage.

It is hoped therefore that, in the same way that Doll and Hill's (1950) report forced reconsideration of commonly held beliefs and assumptions about cigarettes, this research will compel those associated with Insights Discovery and other psychometric tools, to stop, think and consider. The unintentional irony is of course that I am, via this research project, attempting to challenge thoughts and assumptions about the Insights Discovery tool – actively seeking to transform thinking about a transformational learning intervention.

This study is therefore able to specifically contribute to the field of critical HRD studies, through its analysis of the interpretations, emotions and well-being of those who have been affected by the Insights Discovery model - an intervention with a powerful identity messages. In casting a spotlight on this tool, the research has considered the implications and consequences of an identity shaping change intervention, challenging Insights Discovery as a 'taken for granted', innocuous HRM/HRD tool. The research reveals that far from being a harmless instrument, the aftermath of Insights Discovery can possibly be traumatic and career limiting. The 'fallout' has the potential to be life changing for all the wrong reasons.

The research has also revealed that despite the similarity with other psychometric tools, there is no historical precedent set for the very personal, almost intimate nature of the Insights Discovery profile. When shared publically, participants are in effect 'laid bare' and exposed in a potentially perilous position to underlying organizational discrimination and bias. The perceived accuracy of results, coupled with pressurised publicity makes for a dangerous mix – a double edge sword. It can be argued that labels create as much as describe reality and that once participants are labelled in this way, the 'stigma' or 'glory' attached may be hard or even impossible to remove.

This research has provided me, as an HRD professional and facilitator of the Insights Discovery model, with a timely juncture to consciously stop, think and consider the implications and consequences of its use. The hope is that the research outcomes will charge other professionals with a similar level of duty and responsibility, prompting them to stop and reflect on the reasons why the Insights Discovery model is being used, think about what organizational benefits can be gained by ranking and segregating the workforce and consider whether these benefits are significant enough to mitigate any potential risk and damage to all those concerned. If this research has served only to open the eyes of practitioners and awaken them to the possible implications and consequences of their actions, then I believe this thesis has been a worthwhile endeavour.

# Appendices

## 1. Ethics Clearance

Business School

### A PROFORMA FOR STAFF AND STUDENTS BEGINNING A RESEARCH PROJECT

This proforma should be completed by all staff and research students undertaking any research project and by taught students undertaking a research project as part of a taught module.

#### Part A (compulsory)

Research Proposer(s): ..... BRIDGET FREER .....

Student number (if applicable): ..... 201209559 .....

University of Hull email address: ..... b.freer@hull.ac.uk .....

Programme of Study ..... RESEARCH PROGRAMME .....

Research (Working Dissertation/Thesis) Title: ..... INSIGHTS DISCOVERY:  
A LONGITUDINAL STUDY OF ORGANISATIONAL IMPACT .....

Research (brief): .....  
TO CONSIDER: THE ORGANISATIONAL IMPACT OF  
THE PSYCHOMETRIC TOOL, INSIGHTS DISCOVERY -  
THE SHORT/LONG TERM IMPACT ON INDIVIDUALS WITHIN  
THE ORGANISATION .....

Proforma Completion Date: ..... 20.4.13 .....

Tick and sign by one of the following statements:

1) I confirm that human participants are not involved in my research and in addition no other ethical considerations are envisaged.

Signature of researcher.....

2) Human participants are involved in my research and/or there are other ethical considerations in my research.

Signature of researcher..... *B. Freer* .....

*If statement 1 is ticked and signed, there is no need to proceed further with this proforma, and research may proceed now.*

*If statement 2 is ticked and signed the researcher should complete part B of this proforma.*

**Part B**

This proforma should be read in conjunction with the Ethical Principles for Researchers and the HUBS flow chart of research ethics procedures. It should be completed by the researchers. It should be sent on completion, together with a brief (maximum one page) summary of the issues/problems in the research (and how they are proposed to be dealt with), for approval to the Chair of the HUBS Research Ethics Committee (or nominated Committee member) or in the case of research being completed as part of a taught module to the student's supervisor or module leader prior to the beginning of any research.

**NOTE**

If this research has a research population of those under 18 years of age it requires specific authorisation, including that from authorities outside the University. It should not proceed until such authorisation has been obtained in writing.

1. Will you obtain written informed consent from the participants? ~~YES~~ **Y**  
*If yes, please include a copy of the information letter requesting consent. In the case of electronic surveys it is acceptable to advise participants that completion of the survey constitutes consent. Please provide a printout of the survey template.*  
*If no, the research should not proceed unless you can specifically satisfy the Research Ethics Committee with the measures you will take to deal with this matter.*
  
2. Has there been any withholding of disclosure of information regarding the research/teaching to the participants? **Y**~~N~~  
*If yes, please describe the measures you have taken to deal with this.*
  
3. Issues for participants. Please answer the following and state how you will manage perceived risks if any answer is YES:
  - a) Do any aspects of the study pose a possible risk to participants' physical well-being (e.g. use of substances such as alcohol or extreme situations such as sleep deprivation)? YES **NO**
  
  - b) Are there any aspects of the study that participants might find humiliating, embarrassing, ego-threatening, in conflict with their values, or be otherwise emotionally upsetting? YES **NO**
  
  - c) Are there any aspects of the study that might threaten participants' privacy (e.g. questions of a very personal nature; observation of individuals in situations which are not obviously 'public')? YES **NO**
  
  - d) Does the study require access to confidential sources of information (e.g. medical records)? YES **NO**
  
  - e) Could the intended participants for the study be expected to be more than usually emotionally vulnerable (e.g. medical patients, bereaved individuals)? YES **NO**
  
  - f) Will the study take place in a setting other than the University campus or residential buildings? **YES** NO
  
  - g) Will the intended participants of the study be individuals who are not members of the University community? **YES** NO

\*Note: if the intended participants are of a different social, racial, cultural, age or sex group to the researcher(s) and there is **any** doubt about the possible impact of the planned procedures, then opinion should be sought from members of the relevant group.

4. Might conducting the study expose the researcher to any risks (e.g. collecting data in potentially dangerous environments)? Explain your method of dealing with this. YES  NO
5. Is the research being conducted on a group culturally different from the researcher/student/supervisors?  Y  N  
If yes, are sensitivities and problems likely to arise?  Y  N  
If yes, please describe how you have addressed/will address them.
6. Does the research conflict with any of the HUBS's research ethics principles?  Y  N  
If YES do not proceed Describe for the Research Ethics Committee what action you have taken to address this?
7. If the research requires the consent of any organisation, have you obtained it?  Y  N  N/A  
If NO do not proceed Describe for the Research Ethics Committee what action you have taken to overcome this problem.
8. Did you have to discuss the likelihood of ethical problems with this research with an informed colleague?  Y  N  
If yes, please name the colleague and provide the date and results of the discussion.

Thank you for completing this proforma. If you are a research student/member of staff this form must be signed by you, your supervisor/colleague and the HUBS Research Ethics Committee representative for your area. In the case of students undertaking research as part of a taught module, it must be signed by you and your supervisor or module leader. Once signed, staff and research students should send copies of this form, and the proposal must be sent to the Secretary of the Research Ethics Committee, Hull University Business School (see flow chart), including where possible examples of letters describing the purposes and implications of the research, and any Consent Forms (see appendices).

Name of Researcher/Student ..... BRIDGER FREE .....  
Signature ..... *Bridger Free* ..... Date ..... 20.4.13 .....  
Name of Supervisor/Colleague/Module leader ..... DR DENISE THURSFIELD .....  
Signature ..... *D. Thurstfield* ..... Date ..... 1/5/13 .....

For proformas completed by staff and research students only:

Name of Research Ethics Committee member ..... *Waymond Rodgers* .....  
Signature ..... *Waymond Rodgers* ..... Date ..... *14/5/2013* .....

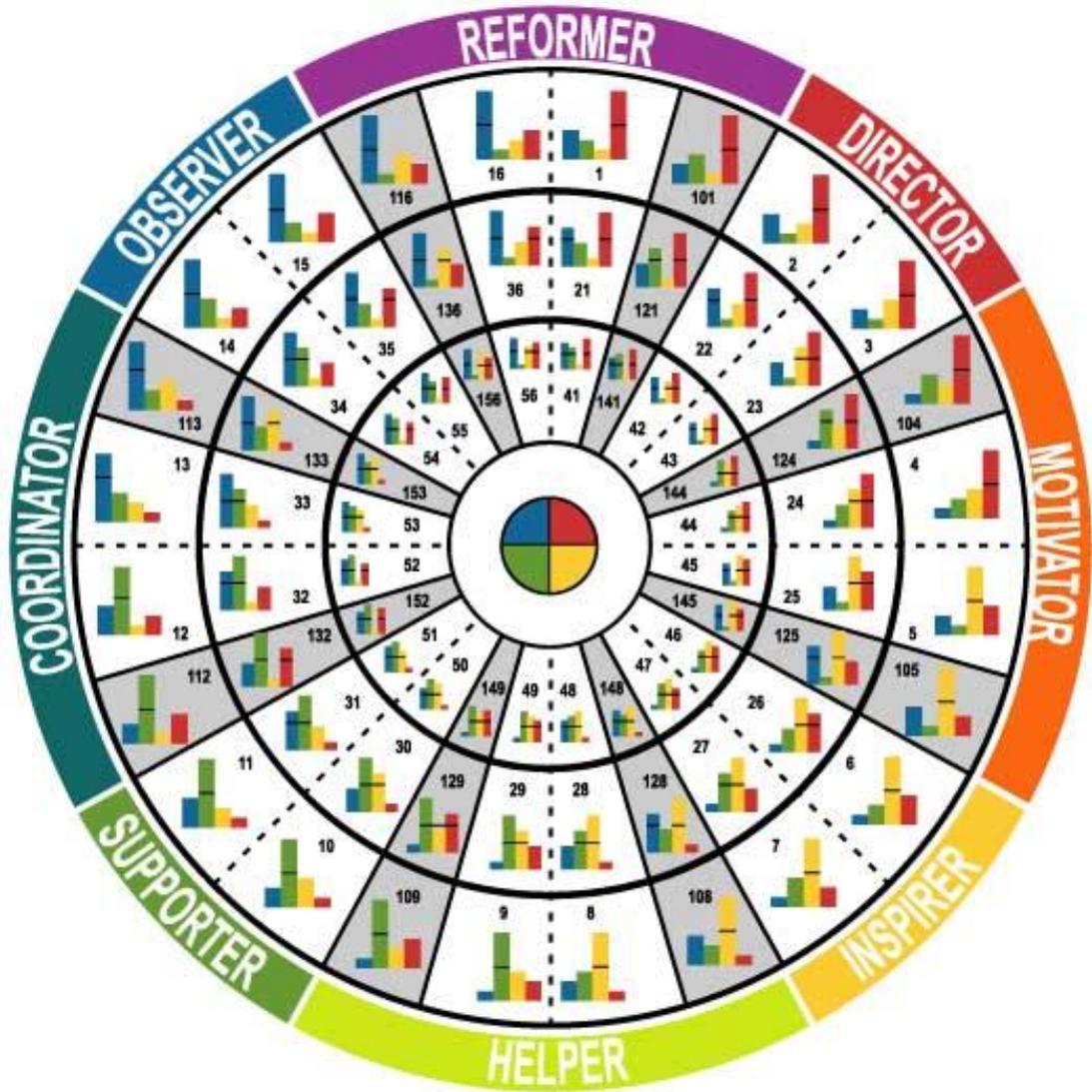
For proformas relating to research funded by grants, please complete the following:

pFact no: .....

RAR no: .....

Funder/sponsor.....

## 2. The Insights Discovery Colour Wheel



### **3. The Insights Discovery Profile**

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