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This dissertation, directed and approved by the candidate's committee, has been accepted by the College of Graduate and Professional Studies of Abilene Christian University in partial fulfillment of the requirements for the degree

Doctor of Education in Organizational Leadership



Dr. Joey Cope, Dean of the
College of Graduate and
Professional Studies

Date: March 18, 2019

Dissertation Committee:



Dr. Richard Dool, Chair



Dr. Karmyn Downs



Dr. Peter Williams

Abilene Christian University
School of Educational Leadership

The Convergence of Engagement Leadership and Leader-Driven Retrenchment Business
Strategies: A Phenomenological Approach

A dissertation submitted in partial satisfaction
of the requirements for the degree of
Doctor of Education in Organizational Leadership

by

Larry Mitchel Hill

March 22, 2019

Dedication

I dedicate this research to my children, Virginia and Jacob. Without their love and support, I could not have entered Abilene Christian University's organizational leadership doctoral program, and this research would not have been possible. Also, I dedicate this study to my grandchildren and posterity with faith that they will embrace learning and advancing knowledge.

I also dedicate this research to my parents. My parents valued education and encouraged their children to pursue higher education. I am very grateful for their love and guidance and the sacrifices they made for their children and grandchildren.

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In addition, I would like to thank the study participants, who willingly offered to share their valuable time and lived experiences. This research would not have been possible if not for their cooperation and enthusiasm regarding their crucial role in this study.

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Abstract

Scholars and practitioners have studied employee engagement extensively since the late 1990s. Because engaged employees can create a competitive advantage for business enterprises, academics and practitioners have emphasized the need for further research into the relationship between leadership, context, and engagement. There is a gap between knowledge of employee engagement and leaders' ability to directly engage employees through decisions, actions, and behaviors. Researchers have suggested that employees' situational assessment also influences their engagement. The purpose of this study was to explore how leader-driven retrenchment strategies during a severe and protracted economic downturn interacted with business leaders' ability to engage their workforce. The rationale of this study was to investigate how an economically challenging environment influenced employee engagement through business leaders' substantive insights and perspectives and to add to the extant leadership and engagement literature. Data were gathered from senior leaders at organizations that had recently experienced a severe and protracted economic downturn. A qualitative phenomenological research approach with a central question was employed to understand how execution of retrenchment business strategies during a recession interacted with leaders' ability to engage their workforce. Purposive sampling was employed. The main study sample consisted of 10 senior leaders at various oilfield services and equipment firms who were responsible for developing and implementing retrenchment business strategies to offset the significant reduction in activity, revenue, and profitability during the 2014–16 recession. The primary data source was the participants' transcribed responses. Data analysis included manual analysis in Microsoft Excel and programmatic analysis in Dedoose 8.1.8. The phenomenological research findings indicated that senior leaders assessed and responded to an adverse economic climate and their employees' reactions during the recession. The results illuminated the interactions between leading

engagement practices and executing retrenchment business strategies during an economic downturn. The findings suggested that the economic contractions impacted business leaders and employees and that leaders adapted their leadership to encourage and sustain employee engagement.

Keywords: employee engagement, work engagement, disengagement, engagement leadership, leading engagement, retrenchment business strategies

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Chapter 1: Introduction

The development and implementation of strategies that foster employee engagement may lead to higher levels of individual and organizational performance in commercial enterprises. Based on the reviewed literature, engaged employees are a competitive advantage in an increasingly demanding business environment (Bedarkar & Pandita, 2014; Macey & Schneider, 2008) and have been linked to improved individual productivity and organizational profitability (Gallup, 2017; Harter, Schmidt, & Hayes, 2002; Merry, 2013). Furthermore, researchers have indicated that leaders can influence the engagement of their workforce and that employee engagement can lead to higher levels of job performance (Christian, Garza, & Slaughter, 2011). While employee engagement can enhance business firms' competitive position in the market and improve organizational performance, changes in economic conditions may affect levels of employee engagement.

Given the organizational advantages associated with employee engagement, researchers have sought to determine the antecedents of engagement and to make these available to leaders as a means of encouraging engagement (Rich, LePine, & Crawford, 2010). While the benefits and drivers of employee engagement are accessible to leaders, there continues to be a significant percentage of employees who are not engaged (Gallup, 2017). Researchers have found that leaders either do not fully appreciate the potential of engaged employees or their leadership has not created the conditions necessary to motivate employees to engage at work (Gallup, 2017).

Researchers of employee engagement have determined the antecedents of engagement. In a pioneering ethnographic study, Kahn (1990) suggested that three psychological conditions—job meaningfulness, safety, and availability—must be met to motivate employees to engage at work. Engagement researchers have produced knowledge regarding the positive effects of job resources on engagement and the negative relationship between job demands and engagement

(Bakker & Demerouti, 2007). The job demands-resources (JD-R) model holds that job demands draw on an individual's physical and psychological resources, leading to lower levels of motivation and, ultimately, exhaustion and disengagement (Schaufeli, 2015). In contrast, the availability of relevant job resources increases employees' motivation, engagement, and productivity (Schaufeli, 2015). Practitioners such as Dale Carnegie have contributed to the understanding of engagement antecedents. Employee-leader relationships, employee attitudes toward the organization, and employee confidence in senior leadership influence employee engagement (Dale Carnegie and Associates, 2014). Leaders who know what employees value and what motivates them to engage in their work have crucial information that may be leveraged to encourage workforce engagement and enhance organizational performance.

Business leaders who engage employees positively influence individual performance and organizational outcomes. Researchers have suggested that job resources such as leader and peer support, recognition, and leader feedback are proximal drivers of engagement (Bakker & Demerouti, 2007; Brough et al., 2013). Albrecht, Bakker, Gruman, Macey, and Saks (2015) proposed that distal antecedents of employee engagement, such as organizational-level resources and leadership, have been underinvestigated and merit further study. As evident in the engagement literature, leaders directly and indirectly influence the engagement of their workforce. Although scholars have explored the effect of leadership on engagement, this relationship requires further examination (Blomme, Kodden, & Beasley-Suffolk, 2015; Schaufeli, 2015; Xanthopoulou, Bakker, Demerouti, & Schaufeli, 2009). In this study, I sought to contribute to the existing literature by exploring how an adverse economic environment interacts with leadership and employee engagement.

Business environments change over time, and these changes impact both the organization as a whole and the individuals within the organization. Leaders are increasingly responsible for

responding to adverse and unstable economic environments and are ultimately accountable for their organization's outcomes (Meneghel, Martínez, & Salanova, 2016). Notably, an engaged workforce improves organizational competitiveness in an economically challenging market (Shuck & Herd, 2012). However, economic downturns can adversely affect employees' work environment and feelings concerning job security as retrenchment business strategies are implemented to offset lower levels of revenue and profitability. According to Kahn (1990), employees' level of engagement is a function of their work context and their assessment of the present situation. Therefore, unfavorable work conditions associated with economic volatility and uncertainty may negatively influence both workforce engagement and organizational performance.

Regardless of the economic environment, business leaders strive to generate profits and adapt their firms to changing financial circumstances. As proposed by McManus and Mosca (2015), organizational leaders adjust to economic downturns and rely on retrenchment strategies, such as reductions in force, to lower their firms' cost structure. Cost-cutting strategies can increase organizational profitability but may result in increased job demands and higher levels of job insecurity for the surviving employees (McManus & Mosca, 2015). While determining employee engagement antecedents has been a primary focus of practitioners and academic researchers, further context-specific engagement research is required (Jenkins & Delbridge, 2013). In this study, I sought to advance scientific and practical knowledge regarding the relationship between leader-driven retrenchment strategies and engagement leadership during economic adversity.

Background of the Problem

Although scholars and practitioners have substantiated the significant benefits of employee engagement in the past 20 years, employee engagement continues to be a notable

challenge for leaders. According to Gallup's (2017) employee engagement survey findings, 67% of American workers were not engaged, whereas the rest (33%) were highly engaged. These findings are noteworthy given that in today's challenging and highly competitive business environment, employee engagement has been shown to improve organizational productivity and profitability (Gallup, 2017; Merry, 2013; Rich et al., 2010). Although drivers of engagement are well documented, the context-neutral and prescriptive nature of the antecedents may lead to misapplication by leaders, as well as failure to create the specific conditions required to motivate employee engagement.

Leaders also have the potential to disengage their employees. Based on the reviewed literature, employee disengagement is the opposite of engagement and is harmful to organizations (Schaufeli & Bakker, 2004). When leaders do not support their employees or do not provide an appropriate level of job resources, employees are more likely to disengage (Schaufeli, 2006). Employees disengage when they feel they are not receiving support from their leaders and when they feel as though their work is not personally meaningful (Wollard, 2011). Various internal and external business constraints impact leaders' actions, and these limitations may inhibit leaders' ability to motivate employees to engage in their work.

In the oil and gas industry, for example, leading and working are particularly challenging. Oilfield services and equipment (OFSE) employees sometimes face tasks that are dangerous and physical and mentally demanding. Unfortunately, a large percentage of OFSE employees are not fully engaged and are looking for job opportunities outside the oil and gas industry (Lee, 2017). Lee (2017) posited that more than 75% of oil and gas professionals are looking to exit the industry and that millennials are reluctant to enter the industry.

In addition, Lee (2017) stated that within the oil and gas industry, employee engagement can lead to higher levels of employee retention and that employee retention is negatively related

to workforce disengagement. Given that the industry's employee engagement levels are similar to the national averages reported by Gallup (2017), employee disengagement and retention are significant OFSE issues. To elaborate on Lee's (2017) assertions, I gathered anecdotal evidence about employee engagement and retention from several OFSE leaders, who suggested that improving employee engagement and retention is an organizational challenge for leaders during times of both business expansion and contraction. Although information about employee engagement in the OFSE industry is limited, the findings of this study indicated that employee engagement is a significant leadership issue.

Study context and OFSE industry information. The context of this research was the U.S. OFSE industry during the 2014–16 oil and gas industry recession. In 2014, the price of West Texas Intermediate (WTI) oil peaked at \$114 per barrel, and 4 months later the price of WTI oil had dropped to approximately \$45 per barrel (Tokic, 2015). As the price of WTI oil declined, demand and pricing for oilfield products and services fell swiftly (England, 2017; West, Hoh, Nuta, & Schnier, 2016). (Appendix A shows the drop in the price of WTI oil from October 2014 to early 2016.)

Each new oil or natural gas well requires OFSE to drill into the earth to reach and extract the hydrocarbons from subterranean reservoirs. Using U.S. drilling rig activity as a proxy for overall U.S. OFSE industry activity, I analyzed the U.S. drilling rig count (see Appendix B), which revealed the severity of the 2014–16 recession. The substantial reduction in the number of active drilling rigs mirrored the overall drop in demand for oilfield products and services. During the recession, OFSE industry revenues dropped by about 55%, and job losses were greater than 50% in some industry subsectors (Deloitte, 2017). Notably, approximately 1 out of 3 OFSE companies ceased operations during the 2014–16 industry contraction (Deloitte, 2017). The magnitude of this downturn in business underscores the uncertainty and challenges OFSE

leaders face and the need for organizations to successfully adapt to significantly lower demand for their products and services.

Beyond the OFSE industry economic downturn in 2014–16, the industry had been relatively volatile since the early 1980s. The frequency and magnitude of changes in the U.S. drilling rig count from 1991 to 2017 (see Appendix C) highlight the economic instability of the industry. Industry volatility has been and continues to be concerning to business owners and senior leaders who are responsible for their organization's long-term sustainability (Vora, 2013). Through this contextual study, I explored OFSE leaders' experiences during a severe and protracted industry recession.

The OFSE industry impacts local economies in many countries. In the United States, these firms include large employers in Texas, Oklahoma, New Mexico, Colorado, Louisiana, Utah, North Dakota, Pennsylvania, West Virginia, and Ohio. OFSE companies also impact the state economies of Kansas, Mississippi, Alabama, Wyoming, California, and Arkansas. The OFSE industry includes large multinational organizations such as Schlumberger Limited, Halliburton Energy Services, General Electric Oil and Gas, National Oilwell Varco, and Weatherford International (Deloitte, 2017). There are also significant U.S. regional players such as Patterson-UTI Energy, Superior Energy Services, FTS International Services, Keane Group, and Forum Energy Technologies. These publicly traded firms and private firms provide the expertise and products required to drill and produce natural gas and oil wells.

Leaders in the OFSE industry have been challenged by oil and natural gas price volatility and by the resultant variances in demand for their products and services. In light of the industry's activity trends (see Appendixes B and C), it is easy to recognize that OFSE business owners and senior leaders are motivated to focus on managing short-term profitability and cash

flow. To offset significantly lower revenues, OFSE leaders have consistently employed retrenchment business strategies during economic downturns.

Economic conditions and leader-driven retrenchment strategies. The 2014–16 contraction in demand for OFSE was a global phenomenon. In the United States, this economic downturn created a hypercompetitive environment in which business leaders developed and executed retrenchment business strategies to improve their firm’s financial position and survivability (Deloitte, 2017). During the 2014–16 OFSE industry recession, leader-driven retrenchment business strategies included closing and consolidating facilities, canceling purchase orders, implementing reductions in force and salary cuts, scaling back benefits packages, and delaying or canceling capital investments (Deloitte, 2017). Conventional wisdom holds that business leaders should execute retrenchment strategies during an economic crisis to offset lower revenue and to improve financial viability (Mann & Byun, 2017), despite the negative effects on employee engagement and therefore organizational performance (Harter et al., 2002; Kumar & Pansari, 2016; Merry, 2013). As such, an economic recession can challenge leaders’ capability to address their financial responsibilities and to protect, support, and motivate human assets.

Retrenchment business strategies implemented by financially distressed firms often include reductions in force. More than 440,000 oil and gas employees lost their jobs during the 2014–16 oil and gas industry recession, and approximately 334,000 OFSE jobs were cut (Jones, 2017). While the severity of this industry contraction called for large-scale layoffs to offset a substantial drop in revenue and profitability, the decision to downsize can be demoralizing and stressful and can adversely affect employee engagement and firm capabilities (Kowske, Lundby, & Rasch, 2009; Merry, 2013). Moreover, the execution of retrenchment business strategies can limit near-term professional advancement opportunities and significantly increase job insecurity, which may undermine employee engagement (Bakker & Demerouti, 2007).

In the 2014–16 OFSE industry downturn, leaders sought to lower payroll costs. The chief executive officer (CEO) of one multinational OFSE company announced that his company had reduced its employee count by more than 23,000 from January 2015 to July 2016 and had decreased payroll costs by 42% during the same period (“Weatherford,” 2016). He also stated that the company’s manufacturing facilities were operating at approximately one-third capacity and that its service infrastructure was significantly underutilized (“Weatherford,” 2016). Another industry CEO shared that his firm had laid off about 40% of its workforce since the beginning of the downturn (“Halliburton’s,” 2016). While OFSE firms experienced different levels of distress during the 2014–16 recession, all OFSE senior leaders faced extreme operating conditions in which achieving break-even profitability and positive cash flow were at times impossible (Deloitte, 2017).

Leaders in the OFSE industry have suggested that the 2014–16 downturn in activity was unprecedented; however, significant recessions in this industry have occurred periodically. It is probable that the industry will continue to experience irregular and sharp economic contractions. In this dynamic and challenging context, leaders have pursued strategies that maximize financial profitability or at least minimize losses. Concurrently, leaders are interested in sustaining employee engagement to address an increasingly competitive market (Knight, Patterson, & Dawson, 2017). While retrenchment business strategies have been used to help organizations survive during industry recessions, these approaches can negatively affect firms’ workforce and, potentially, employee engagement.

Although retrenchment business strategies may be financial necessities, researchers have stressed the importance of creating and maintaining workplace engagement (Krishnaveni & Monica, 2016; Kumar & Pansari, 2016). However, research regarding how the execution of retrenchment business strategies affects leaders’ ability to engage employees is practically

nonexistent. Thus, it is unknown how leader-driven retrenchment strategies during a deep industry recession affect leaders' ability to engage their workforce. Understanding how retrenchment business strategies influence engagement leadership might lead to knowledge that benefits organizations, leaders, and employees.

Theoretical framework. The conceptual framework that guided this study was the JD-R model, which holds that there is a positive relationship between job resources and engagement (Schaufeli & Bakker, 2004) and a negative correlation between job demands and engagement (Bakker & Demerouti, 2007). Kahn's (1990) theoretical engagement framework, which includes the psychological conditions—job meaningfulness, safety, and availability—necessary for engagement, also influenced this study. Many of the authors of the employee engagement literature have cited these seminal studies, and the concepts posited by these researchers are foundational to this qualitative research.

Statement of the Problem

The general problem is that while U.S. business leaders may recognize the organizational benefits of engaged employees, a large percentage of employees are not engaged or are disengaged (Gallup, 2017). Scholarly research findings have suggested that employee engagement can lead to improved organizational performance and financial results (Harter et al., 2002; Merry, 2013), but a significant percentage of U.S. workers are not engaged (Gallup, 2017). In the United States, only one-third of the employees are engaged, and most have little confidence in their firm's leadership (Gallup, 2017). These generalized findings suggest that employee disengagement is a significant problem for business leaders and may be more problematic for leaders of financially distressed firms.

The 2014–16 contraction in demand for OFSE in the United States created a hypercompetitive environment. Senior business leaders executed retrenchment business

strategies to improve their firm's financial position and survivability (Deloitte, 2017). During this industry contraction, retrenchment business strategies included closing and consolidating facilities, implementing reductions in force and salary cuts, scaling back benefit packages, and delaying or canceling investments in capital. Given that the oil and gas industry has been, and will likely continue to be, a highly volatile industry, OFSE leaders will face financial crises and will need to develop and execute retrenchment business strategies to offset lower revenues and profitability.

The specific business problem is the lack of understanding of how leader-driven retrenchment business strategies during a severe economic recession interact with leaders' ability to engage employees. Business leaders recognize that they are responsible for engaging their employees (Popli & Rizvi, 2016); however, their focus on engagement may be adversely affected as the need to develop and implement retrenchment strategies take precedence. A substantial number of OFSE employees lost their jobs in the 2014–16 economic recession, and the surviving employees experienced high-levels of job insecurity. Although the severity of the 2014–16 economic recession called for large-scale layoffs to offset a substantial drop in revenue and profitability, the decision to downsize the workforce and reduce employees' pay and benefits can negatively impact employee engagement and firm capabilities (Kowske et al., 2009).

Purpose of the Study

The purpose of this qualitative phenomenological study was to explore the experiences and perspectives of U.S. OFSE leaders regarding how they engaged employees and how their execution of retrenchment business strategies during a severe and protracted industry recession interacted with their ability to engage their employees. Recognizing that effective leaders are more likely to have engaged employees (Folkman, 2017), I defined the ultimate goal of this study as follows: to develop practical knowledge that enhances engagement leadership practices

and workforce engagement while executing necessary retrenchment business strategies. The practical knowledge advanced in this study is meant to help leaders successfully manage the disruptive forces associated with business volatility and capitalize on emerging opportunities.

I used a qualitative research approach to gather contextual data. In addition, I used a phenomenological methodology to focus the study and to gain leaders' insight into a specific phenomenon (Henriques, 2014). The study participants consisted of U.S. OFSE senior leaders who had substantial financial responsibility during the 2014–16 severe economic downturn and were responsible for developing and executing retrenchment business strategies. The interviews of senior OFSE leaders took place at their place of business or my office in Houston, Texas.

Research Question

Developing a research question is a fundamental step in the qualitative research process. As posited by Agee (2009), a research question within qualitative research “gives shape and direction to a study in ways that are often underestimated” (p. 431). This study's central research question was, How do U.S. OFSE leaders' retrenchment business strategies within the context of a severe and protracted industry recession interact with their ability to engage their workforce? Through the central research question, I sought to gain insight from OFSE leaders into their experiences with concurrently engaging employees and executing retrenchment business strategies. The context of the study was a financial crisis during a severe and protracted economic downturn.

Definition of Key Terms

Economic downturn or recession. In a free market economy, recessions are regular occurrences that result from times of prosperity and eventually give way to new periods of prosperity (Machado & Mata, 2015). They are characterized by a prolonged reduction in demand for products and services and significantly lower levels of revenue and profitability.

Oilfield services and equipment (OFSE) industry. This global industry provides products and services that enable the owners of oil and natural gas resources to produce and commercialize their assets. The industry is highly cyclical and since the early 1980s has experienced periods of substantial growth and decline due to the volatility of natural gas and oil prices (Moore & Deane, 2014).

Profit. Profit is calculated as the difference between revenue collected and costs incurred.

Profitability. Profitability is a function of controllable and uncontrollable factors. Business leaders can partially control profitability by managing the price and costs of their products and services. Uncontrollable external factors, such as the political and economic environment, can significantly impact a firm's profitability (Alsyouf, 2007).

Strategy. Strategy is a set of principles communicated by organizational leaders and adopted by an organization, which aligns the decision makers. Strategy ensures that decisions are prioritized based on organizational objectives (Watkins, 2007).

Summary

This chapter included employee engagement information and specific industry metrics, which emphasize the significance of partial engagement, disengagement, and industry volatility. Given these disruptive and counterproductive factors, business leaders must seek to improve employee engagement and understand how leader-driven retrenchment business strategies during a severe economic recession interact with their ability to engage employees. The purpose of this study and the central research question presented in this chapter support the problem statement. Definitions of key terms, relevant constructs, participant characteristics, and industry data were discussed.

Chapter 2 is a review of the literature that supports the study's research question and purpose. The literature review includes seminal engagement studies and the theoretical

background of engagement, which contribute to the understanding of employee engagement and the relationships between leadership and retrenchment business strategies and employee engagement.

Chapter 2: Literature Review

The purpose of this empirical phenomenological study was to explore the experiences of senior leaders at U.S. OFSE companies in a highly challenging economic environment. Specifically, I explored the interaction between leader-driven retrenchment business strategies and senior OFSE leaders' perceptions of their ability to engage their workforce. This research purpose led to a central research question and interview questions as the primary means of gathering data. The central research question was, How do U.S. OFSE leaders' retrenchment business strategies within the context of a severe and protracted industry recession interact with their ability to engage their workforce?

In this chapter, I review the relevant literature in the areas of employee engagement theory, leader-employee engagement relationships, engagement leadership, and retrenchment business strategies. I intended for the literature review to demonstrate a comprehensive understanding of relevant studies, phenomena, theories, vocabulary, implications of findings, and gaps in the literature (Randolph, 2009). The literature review supports the purpose of this qualitative phenomenological research, exploring the relationships among leaders' employee engagement capabilities, unfavorable economic conditions, and the execution of retrenchment business strategies.

I found the peer-reviewed articles used in this study in multiple scholarly databases within the Abilene Christian University (ACU) Margaret and Herman Brown Library. To ensure research quality, I primarily drew the literature from peer-reviewed journals (Bryman, 2007). These databases included, but were not limited to, EBSCOhost, ProQuest, Academic Search Complete, ScienceDirect, PsycARTICLES, Business Source Complete, PsycINFO, and Sage Premier Collection. I accessed additional databases, such as Academia.edu and ResearchGate, through Google Scholar. I found the OFSE industry and company information in industry trade

journals and in online oil and gas industry databases. The keyword searches included *employee engagement, work engagement, disengagement, engagement leadership, leading engagement, retrenchment business strategies, oil and gas industry recession or downturn, and qualitative and phenomenological research*. The literature review included more than 70 peer-reviewed articles, as well as OFSE industry references from respected and well-known industry journals and websites.

I searched for the keywords *engagement* and *disengagement* in order to gain knowledge of the definitions, antecedents, and consequences of employee engagement and disengagement. An inquiry into employee engagement was crucial to the development of this contextual research and the research question. Moreover, searches for *leading engagement* and *engagement leadership* allowed me to locate studies regarding how leadership affects employee engagement and organizational performance. In addition, through a search for *retrenchment business strategies*, I sought to determine the actions that business leaders most often implemented to offset significantly lower levels of profitability.

Theoretical Framework

Research on engagement formed the foundation of this study. Kahn (1990), in a seminal research article, introduced a theoretical framework that included the psychological conditions that influence employees' level of motivation to engage at work. In this study, I drew on Kahn's findings on personal engagement antecedents, job meaningfulness, safety, and availability to explore how leadership decisions and actions during an adverse economic environment interacted with employee engagement.

Bakker and Demerouti (2007) in their seminal research explored the relationship between JD-R and engagement, which was foundational to my investigation into the leader-employee engagement relationship. While their findings suggested that work resources were associated

with employee engagement and work demands were associated with engagement, they also determined that the availability of relevant job resources could counteract the adverse consequences of higher job demands (Bakker & Demerouti, 2007). Stated differently, job resources are levers available to leaders to foster engagement even as employee job demands increase due to the effects of adverse economic conditions.

Grounded by Kahn's (1990) personal engagement theoretical framework and the JD-R theoretical model (Bakker & Demerouti, 2007), I developed two theoretical models as guides to conceptualize the relationships between organizational context, leadership, and employee engagement. Figure 1 depicts the conceptual relationship that exists between leader-driven job demands and resources and employee engagement in a steady-state economic environment in which the organization is not experiencing substantial financial adversity. I introduced an adverse economic context (a severe and protracted economic downturn) into the conceptual framework in Figure 2. The expectation was that an adverse economic environment would affect leaders' operating options based on financial adversity and therefore motivate leaders to develop and implement retrenchment business strategies. Within this conceptual model, employees would assess their new work environment and the potential for increasing job demands and lower levels of job resources, and then determine their level of motivation to engage at work (Bakker & Demerouti, 2007; Kahn, 1990).

The Significance of Employee Engagement

In the increasingly competitive business environment, employee engagement is crucial to business enterprises. Researchers have suggested that employees can be a competitive advantage; therefore, the engagement of employees is a leadership imperative (Griffin, Bryant, & Koerber, 2015). As such, employee engagement has been a focus of practitioners and scholars since the turn of the 21st century (Saks & Gruman, 2014). Researchers have suggested that there

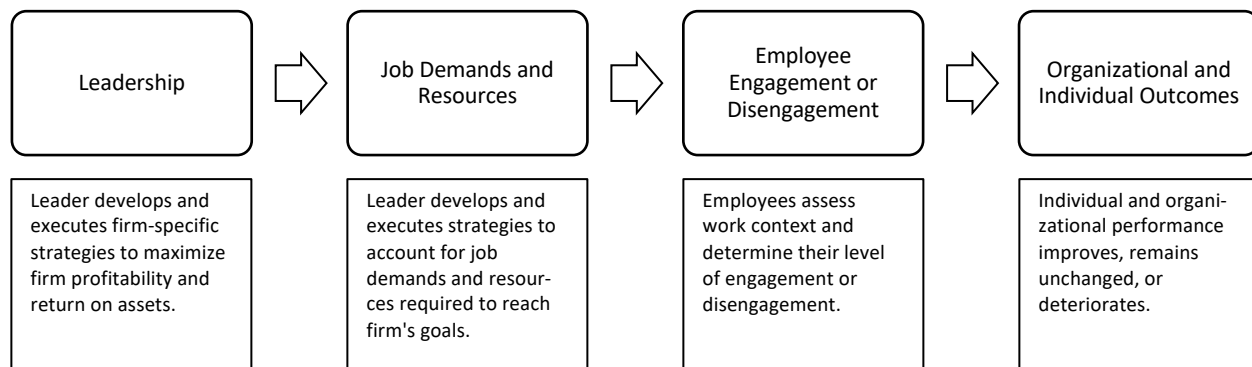


Figure 1. The relationship between leader-driven job demands and resources and employee engagement in a steady-state economic environment.

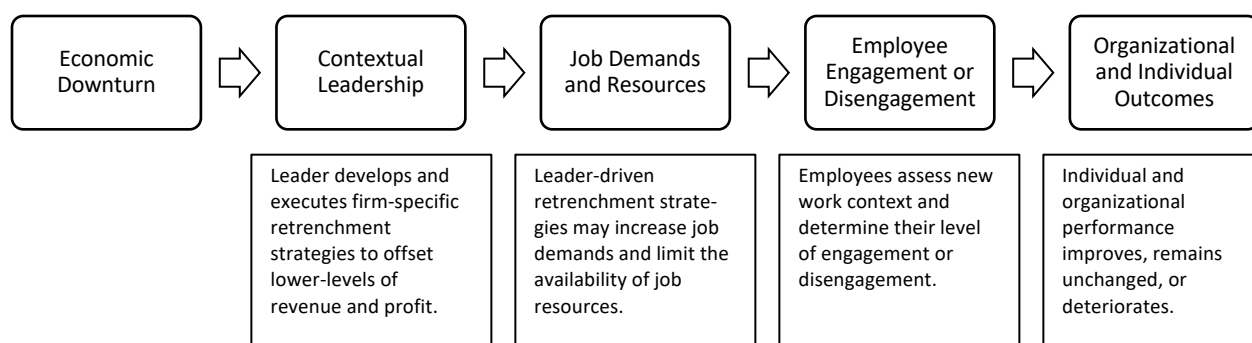


Figure 2. The relationship between leader-driven job demands and resources and employee engagement in an adverse economic context.

is a positive relationship between employee engagement and higher levels of individual and organizational performance, employee retention, customer satisfaction, and profitability (Gallup, 2017; Harter et al., 2002; Merry, 2013; Shuck & Wollard, 2010; Thompson, Lemmon, & Walter, 2015). Likewise, researchers have indicated that firm productivity and value are positively related to engaged employees, whereas disengaged or partially engaged employees are less productive (Aon Hewitt, 2015; Christian et al., 2011; Gallup, 2017; Kahn, 1990). Recognizing the practical benefits of employee engagement, business leaders have become interested in the conditions that encourage employees to engage in their work; however, the relationship between

leadership and employee engagement continues to be underinvestigated (Carasco-Saul, Kim, & Kim, 2015; Schaufeli, 2015).

Due to global competition and the emergence of new technology, the present business environment requires higher levels of employee engagement and productivity (Shimazu, Schaufeli, Kamiyama, & Kawakami, 2015). Awareness of the strategic benefits of employee engagement has increased significantly in the business and academic fields (Bailey, in press). Researchers have emphasized the constructive relationship between work performance and outcomes based on engaged employees who commit cognitively, emotionally, and physically to their work tasks (Christian et al., 2011; Kahn, 1990; Rich et al., 2010). Kahn (1990) suggested that the results of engagement included higher levels of in-role and extra-role performance, which indicated that engagement could enhance individual and organizational outcomes. Christian et al. (2011) proposed that engagement was positively linked to improved job performance and enhanced individual results. Rich et al. (2010) found that engagement was positively related to a person's role intensity and persistence, and their research findings suggested that engaged employees received higher task performance ratings than less engaged employees.

Employee engagement also has organizational consequences. Employee engagement is associated with the performance and success of business organizations; as such, it is a primary focus of business practitioners (Griffin et al., 2015). Researchers have suggested that business leaders should recognize that the engagement of their employees facilitates organizational goals (Gallup, 2017; Kahn, 1990). Kahn (1990) proposed that engaged employees are more likely to excel in their roles as well as seek opportunities to move outside their formal roles to facilitate organizational and peer improvement. Moreover, researchers have suggested that employee engagement is positively related to higher levels of employee commitment, productivity,

customer satisfaction, and sales, and may result in improved organizational profitability (Gallup, 2017; Harter et al., 2002; Merry, 2013). As the business environment becomes increasingly competitive, leaders can leverage employee engagement to create a competitive advantage (Bedarkar & Pandita, 2014; Macey & Schneider, 2008). Employee engagement could be a valuable resource to business leaders in their quest to enhance organizational effectiveness and improve organizational outcomes.

Although employee engagement is a relatively new construct, both organizational leaders and management consultants view employee engagement as a tool that can improve organizational performance (Guest, 2014). While the benefits of engaged employees are substantial and have been of interest to practitioners and academic scholars since the turn of the 21st century, there continue to be significant research opportunities to advance scientific and practical knowledge given the following three propositions. First, organizational-level engagement is an underinvestigated concept that may be positively related to organizational performance (Barrick, Thurgood, Smith, & Courtright, 2015). Second, there continues to be a dearth of contextual employee engagement research (Bakker, Albrecht, & Leiter, 2011; Jenkins & Delbridge, 2013; Saks & Gruman, 2014). Third, researchers have asserted that the effect leaders have on their employees' engagement has not been adequately investigated (Blomme et al., 2015; Schaufeli, 2015; Xanthopoulou et al., 2009).

Kahn's (1990) research findings supported the concept that the employee engagement construct is fundamentally different than other well-established constructs, which reinforces the relevance of engagement studies. Researchers have questioned the difference between employee engagement and former positive psychology theories such as job satisfaction, organization citizenship behavior, and organizational commitment (Newman & Harrison, 2008; Shuck, Ghosh, Zigarmi, & Nimon, 2012). In contrast, Kahn (1990) and Maslach, Schaufeli, and Leiter

(2001) asserted that employee engagement is more focused on an individual's holistic investment in work, which is fundamentally different than the more familiar constructs. Christian et al. (2011) differentiated engagement from other constructs by proposing that engagement “involves a holistic investment of the entire self in terms of cognitive, emotional, and physical energies” (p. 97). Kaur (2017), in a literature review of 65 empirical papers, also suggested that “engagement is a distinctive and exclusive concept in academic literature” (p. 20).

Academics' and practitioners' interest in employee engagement shows no signs of waning (Guest, 2014). Given the significant and positive relationship between employee engagement and individual outcomes, engagement is considered a unique construct that can be fostered to enhance organizational effectiveness (Kataria, Rastogi, & Garg, 2013). As a valuable construct, leaders may seek to develop employee engagement. The extant engagement literature focuses on engagement in terms of employees' perspectives, attitudes, and outcomes (Rich et al., 2010). Moreover, characterizations of employee engagement tend to be concerned with individual and organizational benefits (Kaur, 2017). Thus, while the engagement research has enhanced understanding of the antecedents and benefits, there remains uncertainty as to the relationships among leadership, employee engagement, and overall organizational effectiveness (Cameron, Mora, Leutscher, & Calarco, 2011).

Seminal Engagement Literature

The literature review includes pioneering works from Kahn (1990); Maslach et al. (2001); May, Gilson, and Harter (2004); Saks (2006); and Bakker and Demerouti (2007). Shuck and Wollard (2010) proposed that these studies are seminal because the authors are known for their substantial influence on the development of employee engagement theories and because the articles are heavily cited in the engagement literature. (See Table 1 for a chronological listing of the seminal engagement articles and the number of times researchers referenced these original

Table 1

Seminal Works on Employee Engagement

Authors	Article title	Citations ^a
Kahn (1990)	“Psychological Conditions of Personal Engagement and Disengagement at Work”	5,872
Maslach, Schaufeli, and Leiter (2001)	“Job Burnout”	13,294
May, Gilson, and Harter (2004)	“The Psychological Conditions of Meaningfulness, Safety, and Availability and the Engagement of the Human Spirit at Work”	2,289
Saks (2006)	“Antecedents and Consequences of Employee Engagement”	3,163
Bakker and Demerouti (2007)	“The Job Demands-Resources Model: State of the Art”	4,856

^aData from Google Scholar.

works in subsequent articles.) I sought to build on these seminal engagement studies by synthesizing the current engagement literature to advance existing knowledge related to the research purpose.

The seminal engagement literature, drawn primarily from psychology and occupational psychology, includes valuable scientific and practical knowledge regarding employee engagement constructs, definitions, antecedents, and individual and organizational benefits. The pioneering studies were analyzed using within-study and between-study analyses. I used a within-study literature analysis to critically assess the content of each article (Onwuegbuzie, Leech, & Collins, 2012). As proposed by Onwuegbuzie et al. (2012), “a within-study literature analysis is used when the work itself is of interest” (p. 5). A between-study analysis enabled me to “compare and contrast information from two or more literature sources” (Onwuegbuzie et al., 2012, p. 5).

As a practical matter, seminal literature is foundational to the development of a construct, as the original findings are tested in later research. Considering the number of citations of the seminal engagement articles in the current literature, I concluded that these original studies continue to be influential in engagement research. Seminal research findings are shown in Table

2, which summarizes leader-employee engagement relationships, contextual concepts, and other findings across these research articles.

Table 2

Seminal Engagement Articles

Citation	Leadership and contextual findings
Kahn (1990)	<ul style="list-style-type: none"> Contextual, organizational, and individual factors affect the psychological conditions that influence levels of engagement. According to the personal engagement theoretic framework, psychological conditions (e.g., job meaningfulness, safety, and availability) can affect employees' motivation to engage at work. Empowering and supportive leaders who allow employees to control their work and to experiment without fear of failure increase levels of engagement. In contrast, leaders who are inconsistent or hypocritical impede engagement.
Maslach, Schaufeli, and Leiter (2001)	<ul style="list-style-type: none"> The JD-R theoretical model is based on the premises that job resources are linked to higher levels of engagement and that job demands can result in burnout. Situational context and organizational factors can significantly affect employee engagement and burnout, whereas individual factors play a less significant role. Leaders who reduce institutional inequities and demonstrate fairness among employees can inspire employee engagement.
May, Gilson, and Harter (2004)	<ul style="list-style-type: none"> Supportive leader-employee relationships are linked to higher levels of psychological safety and engagement. Relevant job resources are positively related to employees' availability and engagement.
Saks (2006)	<ul style="list-style-type: none"> Engagement with others is based on a reciprocal process in which each party assesses the costs and benefits of the relationship. Organizational support and resources motivate employees to engage in their roles. Procedural justice can predict organizational engagement, and job characteristics are positively related to job engagement. Situational changes can impact employees' feeling of obligation to the organization and level of engagement.
Bakker and Demerouti (2007)	<ul style="list-style-type: none"> Job resources can shield against the adverse effects of job demands and become more influential drivers of engagement as job demands increase. The JD-R model is applicable across occupations and situations. Job demands increase when work pressure is great, the work environment is unfavorable, and interactions are emotionally challenging. Employees value job resources, including pay, career advancement opportunities, job security, leader support, role clarity, participation in decision-making, job control, task significance, and performance feedback. Supportive job resources such as performance feedback, information sharing, and job autonomy can offset job demand inflation.

Personal engagement and disengagement. Kahn (1990) introduced the concept of personal engagement at work in his seminal engagement article, describing engagement as the “the harnessing of organization members’ selves to their work roles; in engagement, people employ and express themselves physically, emotionally, and cognitively during role performance” (p. 649). Kahn posited that given the appropriate conditions, people would be motivated to engage and express themselves in the performance of their work tasks. This supposition suggests that people will be motivated to invest cognitively, emotionally, and physically under specific conditions. Grounded in this premise, Kahn sought to identify the psychological conditions that influence employees’ level of engagement or disengagement at work. Consequently, Kahn directed his research to explore people’s contextual work experiences.

Stressing that noncontextual engagement research methodology did not get to the core of engagement across situations, Kahn (1990) suggested that exploring why people engage and disengage from their work calls for “deeply probing employees’ experiences and situations” (p. 693). Therefore, he designed a qualitative ethnographic research methodology to develop a theoretical framework to explain how various work contexts and experiences influence employees’ level of engagement.

Kahn (1990) conducted his ethnographic study in two different settings: a summer camp in the West Indies and a prestigious architecture firm in the United States. Participants were observed to find instances of engagement and disengagement and to develop explanations of the employees’ actions. Subsequent to the observations, participants were interviewed using open-ended questions to explore their perceptions of their experiences during times of engagement and disengagement.

According to Kahn's (1990) analysis, employees' psychological experiences of work affected their level of engagement, and contextual, organizational, and individual factors influenced these psychological experiences. Kahn discovered that work context, mediated by workers' perceptions, created the conditions in which workers decided to engage at work or disengage from work. Specifically, his analysis revealed that engagement was a function of an employee's perceptions of job meaningfulness, safety, and availability across various work situations. Conversely, the absence of these psychological conditions motivated employees to disengage cognitively, emotionally, and physically at work (Kahn, 1990).

Kahn (1990) defined job meaningfulness as "the return on investment of self in role performances" (p. 705). His research findings suggested that challenging jobs that inspired creativity and allowed for autonomy were positively related to employee engagement. In contrast, tasks that included clear procedures and goals also increased job meaningfulness and engagement. Furthermore, formal positions that enhanced self-image, status, and interpersonal interactions that fostered inclusion and self-value were positively associated with job meaningfulness (Kahn, 1990).

Kahn (1990) also indicated that psychological safety was a precondition for personal engagement. According to Kahn, psychological safety is a function of employees' feelings regarding their ability to openly express their thoughts without fear that they will face negative consequences. Leadership attributes such as competence, trustworthiness, supportiveness, and consistency foster employees' psychological safety. Thus, Kahn found psychological safety to be contingent on individuals' perception of having supportive, trustworthy, and open interpersonal relationships. He also found that psychological safety was associated with open communication and clear behavioral expectations.

Finally, Kahn (1990) defined psychological availability as a person's perception of having the resources—cognitive, emotional, and physical—required to engage. As part of the decision to engage or disengage, employees assess their psychological availability. Separate from job demands, nonwork demands decrease availability and thus are negatively related to engagement (Kahn, 1990).

Job burnout and engagement. After Kahn (1990), Maslach et al. (2001) published the next significant academic article on employee engagement. Building on more than 25 years of burnout literature, Maslach et al. conducted a conceptual study that outlined the history, definitions, and situational and individual factors related to job burnout. Maslach et al. asserted that negative psychological states such as exhaustion, cynicism, and inefficacy were the primary focus of psychology. However, Maslach et al. noted that positive psychology studies, through which researchers sought to leverage individual and organizational strengths and performance, had gained acceptance. Given the emergence and acceptance of positive psychology, Maslach et al. developed engagement constructs that they proposed were the antithesis of burnout. Thus, their JD-R model was based on the premise that while job stressors vary across occupations, these stressors may be categorized as either job demands or job resources (Maslach et al., 2001).

Notably, Maslach et al. (2001) developed similar but different engagement definitions and constructs. On the one hand, Maslach and Leiter characterized engagement as energy, involvement, and efficacy, and proposed that engagement and disengagement were on different ends of a continuum. Their findings suggested that employees were more likely to engage when the work was important, meaningful, and challenging. In contrast, a meaningless and unfulfilling job might lead to employee burnout. On the other hand, Schaufeli and colleagues characterized engagement as:

a persistent, positive affective-motivational state of fulfillment in employees that is characterized by vigor, dedication, and absorption. . . . Vigor refers to high levels of

energy and resilience, the willingness to invest effort in one's job, the ability to not be easily fatigued, and persistence in the face of difficulties. Dedication refers to a strong involvement in one's work, accompanied by feelings of enthusiasm and significance, and by a sense of pride and inspiration. Finally, absorption refers to a pleasant state of total immersion in one's work, which is characterized by time passing quickly and being unable to detach oneself from the job. (Maslach et al., 2001, p. 417)

Like Maslach and Leiter, Schaufeli theorized that engagement is the "positive antithesis of burnout" (Maslach et al. 2001, p. 471).

Maslach et al. (2001) asserted that situational context and organizational factors can significantly affect employee burnout and engagement and that individual factors play a lesser role. The researchers' findings suggested that job demands were positively related to burnout, and job resources were associated with higher levels of engagement (Maslach et al., 2001).

Given that employee engagement is a function of work contexts, including job demands and job resources, and that contextual engagement is underinvestigated (Macey & Schneider, 2008; Saks & Gruman, 2014), further research into employee engagement relationships and how different contexts affect job resources and demands is needed (Bakker et al., 2011; Jenkins & Delbridge, 2013; Saks & Gruman, 2014).

Further, Maslach et al. (2001) suggested that burnout and engagement interventions call for new leadership practices and individual training. The authors asserted that leaders could positively impact employee engagement by reducing institutional inequities and enhancing perceptions of fairness among employees in order to reduce levels of employee exhaustion. While the authors posited the need for interventions that encourage engagement and reduce the occurrence of burnout, they did not provide contextual intervention strategies or account for the constraints leaders might face.

Subsequently, Bakker, Schaufeli, Leiter, and Taris (2008) asserted the need to explore how change interventions impact engagement. Studies that enhance understanding regarding the relationship between contextual leadership, organizational change, and employee engagement

initiatives could address this gap in research and lead to the development of practical leader-driven employee engagement interventions.

Psychological conditions of meaningfulness. Building on Kahn's (1990) qualitative engagement research, May et al. (2004) conducted a quantitative study to assess the relationships between employee engagement and psychological conditions, meaningfulness, safety, and availability. May et al. started with the premise that employees need to express themselves in their work in order to invest themselves cognitively, emotionally, and physically in their work.

May et al. (2004) hypothesized that job enrichment, work role fit, and coworker relations were positively linked to psychological meaningfulness, as Kahn's (1990) engagement research revealed that psychological meaningfulness affected employees' motivation to engage. Further, May et al. hypothesized that supportive leaders and healthy coworker relations would be positively associated with psychological safety and that there would be a negative relationship between conformance to organizational norms and psychological safety. Kahn characterized psychological safety as "feeling able to show and employ one's self without fear of negative consequences to self-image, status, or career" (p. 708).

Finally, May et al. (2004) explored the relationship between psychological availability and engagement by testing the hypotheses that resources and psychological availability were positively related and that self-consciousness and outside activities were negatively associated with psychological availability. This was based on Kahn's (1990) assertion that engagement was contingent on employees' confidence that they had the cognitive, emotional, and physical resources available to engage.

In their quantitative study, May et al. (2004) employed a field survey at an insurance firm in the United States. Through the questionnaire, they sought information regarding participants' perceptions of their work, their leaders, their coworkers, and themselves. Like Kahn (1990), the

researchers suggested that psychological meaningfulness, safety, and availability were precursors of employee engagement. May et al. found a positive association between job enrichment and psychological meaningfulness and between job fit and psychological meaningfulness. In addition, leadership support and rewarding peer relationships were positively related to psychological safety, and there was a positive relationship between job resources and availability and a negative relationship between outside activities and availability. The study findings supported Kahn's theoretical personal engagement framework as all three psychological conditions were found to be important in the determination of an employee's level of engagement. Notably, job meaningfulness had the most substantial effect on employee engagement.

Further, May et al. (2004) suggested that employees' level of self-consciousness significantly affected their psychological safety. For example, highly self-conscious employees were inhibited from developing creative solutions. May et al. proposed that supportive leaders could foster employees' level of psychological safety and that job resources could positively affect employees' availability. Considering the ability of leaders to affect job characteristics, job resources, and employee support, May et al. (2004) suggested that leaders could significantly impact employee engagement. The authors also proposed the usefulness of future investigations into how context affects the drivers of engagement and engagement itself.

Role and group engagement. Numerous academic studies have produced the antecedents or psychological conditions of personal and work engagement. Saks (2006) explored engagement at both the job and organizational levels. Moreover, Saks was the first to examine the antecedents and outcomes of both job and organizational engagement.

Saks (2006) used social exchange theory (SET) as the foundation for accounting for employees' level of work and organizational engagement. SET is based on self-interest and

interdependent relationships and the assumption that people's choices are based primarily on relational rewards and costs (West & Turner, 2018). E. J. Lawler (2001) proposed that SET relies on informed people processing information and making rational decisions regarding patterns of exchange. In SET, human relationships and interactions are functions of people making choices similar to those used in economic models (E. J. Lawler, 2001). A fundamental tenet of SET is that people weigh their efforts to sustain the relationship against the rewards obtained from the relationship (West & Turner, 2018).

Saks (2006) proposed that employee engagement was a function of SET and that engagement with others was a reciprocal process between the parties. Whereas previous engagement researchers focused on individuals being psychologically present at the job level, Saks proposed that employees might also be motivated to engage at the organizational level. In SET, organizational engagement is an employee's desire to exchange engagement for corporate-level resources and benefits. In other words, employees might feel compelled to engage based on the resources and social support available in their organization.

Participants in Saks's (2006) study included 102 employees who were attending a large Canadian university. The employees worked in various jobs and firms. Saks developed and tested his three-dimensional (cognitive, emotional, and behavioral) model using quantitative surveys to measure job and organizational engagement, job characteristics, perceived corporate and supervisor relationship, rewards and recognition, leadership fairness, work contentment, organizational commitment, and organizational citizenship behavior.

Saks's (2006) analysis of the data revealed that job and organizational engagement were similar; however, there were differences, as participants indicated higher job engagement relative to organizational engagement. Saks's findings suggested that job and organizational engagement were distinct constructs, and the results indicated that distributive justice, leadership objectivity,

rewards and recognition, organizational support, and job characteristics were positively related to engagement. Organizational and job engagement were significantly and positively associated with organizational commitment, job satisfaction, and organizational citizenship behavior. Interestingly, organizational support was a significant driver of job and organizational engagement. This finding supported the JD-R model, in which the positive relationship between job resources and work engagement is emphasized (Bakker & Demerouti, 2007; Maslach et al., 2001). Notably, Saks found that leadership objectivity was a key organization engagement antecedent, and job characteristics were positively associated with job engagement.

Within the context of SET, leaders need to balance employee and organizational needs. While Saks (2006) did not address contextual issues, Saks suggested the need to appreciate how situations change and how these changes can impact employees' feelings about the value of job resources and perceptions of obligation. Saks asserted that leaders need to determine which resources and benefits are most meaningful to their employees as a means of creating a mutually beneficial exchange.

State of the art: The JD-R theoretical model. Bakker and Demerouti (2007) critically reviewed the literature on the JD-R model to assess its predictive value regarding the well-being and engagement of employees and to develop a more adaptable JD-R model. The goal of their research was to present an overview of the relevant literature, to expand past research to various occupations and working conditions, and to consider both positive and negative outcomes. Whereas researchers had in the past focused solely on the service industry, Bakker and Demerouti posited that the JD-R model could be used to enhance employee performance across multiple professions.

The purpose of Bakker and Demerouti's (2007) study was to provide a better understanding of the JD-R model. Although researchers had previously established that job

attributes could affect employee engagement and burnout levels (Maslach et al., 2001), Bakker and Demerouti suggested that job resources could be an effective barrier against the potentially adverse effects of high job demands. The JD-R model (Demerouti, Bakker, Nachreiner, & Schaufeli, 2001) included the assumption that two categories (job demands and job resources) address the various issues and job stressors across occupations and situations. Therefore, Bakker and Demerouti proposed that the JD-R model could be applied across various industries and occupations, irrespective of specific job demand and resource variances.

Job demands call for mental and physical effort and skills, which result in psychological and physical costs (Bakker & Demerouti, 2007). Bakker and Demerouti (2007) asserted that job demands draw on employees' cognitive, emotional, and physical resources. Similarly, Kahn (1990) asserted that a person's availability to engage is contingent on the physical, emotional, or psychological resources available at a point in time. Bakker and Demerouti proposed that job demands are elevated when pressure at work increases, the organizational environment is unfavorable, or interactions are emotionally challenging. While a higher level of job demands may or may not be counterproductive, escalated job demands require more effort, which increases employees' physiological and psychological stress (Demerouti et al., 2001).

In the context of a commercial enterprise, leaders can make job resources available to employees. Bakker and Demerouti (2007) posited that job resources function to help employees manage job demands, reach goals, and learn and develop skills. The researchers' findings suggested that job resources valued by employees include pay, career advancement opportunities, job security, leader support, role clarity, involvement in making decisions and developing solutions, job autonomy or control, task significance, and individualized feedback (Bakker & Demerouti, 2007). Thus, Bakker and Demerouti proposed that job resources could be used to motivate employees to engage at work and improve performance.

The JD-R model is based on the assumption that psychological processes influence employees' motivation and their perceptions regarding job strain (Bakker & Demerouti, 2007). Demerouti et al. (2001) proposed that excessive job pressures could deplete employees' physical and mental reserves. Consequently, as job demands increase the depletion rate of an employee's available resources, the level of burnout also increases. Bakker and Demerouti (2014) indicated that the rate of depletion of job resources based on higher job demands slows as relevant job resources are made available. Supportive resources such as information sharing, job autonomy, performance feedback, and coaching can offset high job demands (Bakker & Demerouti, 2007; Schaufeli, Bakker, & Salanova, 2006; Tiwari & Lenka, 2016). However, exactly how specific job resources buffer job demands is a function of the situation (Bakker & Demerouti, 2007). Stated differently, the reason why job resources buffer higher levels of job demands is situation specific. This dependency may make the development of prescriptive job resource and engagement interventions challenging.

Notably, Bakker and Demerouti (2007) suggested that job resources were more influential employee engagement drivers when job demands were high. Bakker, Hakanen, Demerouti, and Xanthopoulou (2007) also discovered that job resources could positively affect employee engagement in demanding situations. From a leadership perspective, leaders respond to environmental changes, and their responses may influence the demands placed on employees and the availability of job resources. Therefore, leaders who affect job demands and resources can significantly impact employees' motivation to engage in their work (Bakker & Demerouti, 2007).

Within the JD-R model, job resources have intrinsic and extrinsic motivational capabilities and facilitate employee engagement (Bakker & Demerouti, 2007). In other words, job resources are antecedents of engagement, which hypothetically improves individual and

organizational performance. Bakker and Demerouti (2007) suggested that performance feedback encouraged personal development and self-efficacy and that decision-making empowerment and interpersonal relationships satisfied a person's need for autonomy and belonging. Furthermore, job resources such as pay, task significance, and role clarity may motivate employees to commit higher levels of effort to their work (Bakker & Demerouti, 2007). Therefore, the prudent management of job resources may lead to employee engagement, and the neglect or absence of job resources may lead to cynicism or disengagement (Bakker & Demerouti, 2007).

Employee Engagement Definitions and Characteristics

To understand engagement leadership, which is defined as leaders' intentionality toward the engagement of their employees, there is a need to review the engagement literature and to understand the definitions and characteristics of engagement. Serrano and Reichard (2011), in their review of the existing engagement literature, proposed that the most significant theories of employee engagement were based on Kahn's (1990) original definition; Maslach et al.'s (2001) concept of engagement relative to burnout; and Schaufeli, Salanova, González-Romá, and Bakker's (2002) engagement characteristics, including vigor, dedication, and absorption. However, scholars most frequently used Schaufeli et al.'s (2002) definition (Christian & Slaughter, 2007).

Academics and practitioners have posited various characterizations and definitions of employee engagement. While scholars and leaders appreciate the significance of engagement, there is no single definition of employee engagement (Bedarkar & Pandita, 2014; Macey & Schnieder, 2008; Saks, 2017). In the 21st century, there has been a significant increase in knowledge regarding the benefits of employee engagement; yet there remains a need to better understand the meaning of employee engagement (Saks & Gruman, 2014).

While there continue to be multiple definitions of engagement, researchers have claimed that there is some convergence (Christian et al., 2011; Truss, Delbridge, Alfes, Shatz, & Soane, 2014). To add to the complexity of the engagement construct, academic researchers and practitioners have defined employee engagement differently, and within each group, there are multiple engagement definitions (Saks, 2017). In this literature review, I emphasize the development of the construct by presenting employee engagement definitions in chronological order. The interpretations of engagement advanced by academics and practitioners are segregated to highlight the differences between these groups.

Academic definitions. As posited by Bedarkar and Pandita (2014), Kahn developed the personal engagement concept, and his academic research was instrumental in furthering the employee engagement movement. Kahn (1990) asserted that personal engagement “is the simultaneous employment and expression of a person’s preferred self in task behaviors that promote connections to work and to others, personal presence (physical, cognitive, and emotional), and active, full role performances” (p. 700). Carasco-Saul et al. (2015) suggested that Kahn’s description of personal engagement is the foundation for the definition of employee engagement and that the terms *employee engagement*, *personal engagement*, *work engagement*, and *role engagement* are interchangeable.

Another prominent definition came from the research of Schaufeli et al. (2002), who defined engagement as a “positive, fulfilling, work-related state of mind that is characterized by vigor, dedication, and absorption” (p. 74). Blomme et al. (2015) described these state-like characteristics of employee engagement as follows:

Vigor refers to a state of mind in which individuals feel energetic, fit, strong and indefatigable. Dedication refers to a state of mind in which individuals feel highly engaged by their work, which inspires them, and makes them feel proud and enthusiastic. Absorption refers to a pleasant state of mind in which individuals are fully immersed in their work. (p. 125)

May et al. (2004) asserted that engagement is a function of Kahn's (1990) psychological conditions and suggested that engaged employees feel safe at work, are available, and think that their job is meaningful. Researchers have maintained that work engagement is a state of resilience and involvement in activities that are fulfilling and that enrich self-efficacy (Maslach & Leiter, 2008). Other researchers have suggested that engaged employees are highly motivated and committed to their roles and the organization (Macey & Schneider, 2008). Shuck and Wollard (2010) defined employee engagement as a process in which employees are motivated cognitively, emotionally, and behaviorally toward organizational performance and results. Similarly, academic researchers have proposed that engagement is a high level of personal investment in job performance (Rich et al., 2010).

Employee engagement may also be viewed as a motivation to invest personal effort and energy into an individual's work (Christian et al., 2011). Kahn and Fellows (2013) posited that characteristics of engaged employees include commitment to a meaningful purpose and absorption in their work. Kaur (2017), in a literature review of 65 empirical articles, supported Kahn's (1990) engagement definition by suggesting that employee engagement comprises three parts:

Employee engagement includes a physical part which involves physical labor during work role and displaying positive energy; an emotional part, one is able to connect with oneself as well as with the organization's aims while displaying dedication; and a cognitive part which includes awareness, experience, and skills. (Kaur, 2017, p. 20)

Practitioner definitions. Practitioners have also made substantial contributions to the knowledge of employee engagement. D. Robinson, Perryman, and Hayday (2004) characterized employee engagement as a positive feeling toward organizational values, an understanding of business context, and a desire to improve individual and corporate performance. Aon Hewitt (2015) defined employee engagement as "the psychological and behavioral outcomes that produce higher levels of individual and organizational performance" (p. 9). In addition, engaged

employee attributes include a strong desire to be affiliated with the organization and to help the organization succeed through positive communication regarding the organization and personal determination and effort (Aon Hewitt, 2015). Gallup (2017) suggested that engagement is a condition in which employees are emotionally and psychologically involved in their work and organization and that engaged employees' performance will "propel their team and organization to improved crucial outcomes such as higher levels of productivity, safety, and quality" (p. 41).

While there is no consensus regarding the definition of engagement, there are reoccurring themes that suggest employee engagement is a sought-after condition that positively affects individual and organizational capabilities, employee commitment, involvement, and effort (Jaupi & Llaci, 2015). Given the productive nature of employee engagement and the evidence that leaders can influence engagement levels, business leaders may nurture employee engagement to improve and sustain individual and corporate performance. Research that provides business leaders with knowledge of how their various strategies affect employee engagement may prove useful.

Disengagement Definition and Characteristics

As a practical consideration, it is important to understand that employees may not be entirely engaged or may be disengaged. In contrast to Maslach et al.'s (2001) premise that employee burnout is the antithesis of engagement, Schaufeli, Taris, and van Rhenen (2008) asserted that engagement and burnout are theoretically different; therefore, employees who are not fully engaged may either be partially engaged or decide to disengage from their role. Kahn (1990) described personal disengagement as withdrawal of self—cognitively, emotionally, and physically—during work task performance. Disengagement attributes include distancing oneself from the performance of tasks and negative perceptions regarding a specific task or job content (Demerouti et al., 2001).

Bakker and Demerouti (2007) asserted that inadequate job resources could motivate employees to disengagement, which may result in withdrawing from work and the organization. An employee's decision to disengage at work is the result of untrustworthy professional relationships and results in poor performance and low employee retention (Gallup, 2017). Researchers contend that disengaged employees, in contrast to engaged employees, are less productive and more likely to be absent (Christian et al., 2011; Gallup, 2017; Kahn, 1990). As responsible stewards of an organization, leaders can intervene to reduce employee disengagement and encourage performance improvement.

Burnout Definitions and Characteristics

Business leaders should appreciate that job burnout is an unfavorable employee state. While researchers have investigated and questioned the relationship between burnout and employee engagement (Schaufeli, 2014), there are practical reasons for leaders to recognize the symptoms of burnout and to recognize how job demands and resources affect the well-being and engagement of their workforce. Leaders need to understand the concept of employee burnout and the positive relationship between high job demands and burnout (Maslach et al., 2001). Maslach et al. (2001) proposed that emotional exhaustion, depersonalization, and reduced personal accomplishment are symptoms of burnout. Demerouti et al. (2001) suggested that emotional exhaustion may be a reaction to job stress and may be characterized by fatigue, depression, and anxiety.

As a well-established construct rooted in negative psychology, the state of employee burnout may reduce individual and organizational effectiveness. Reduced personal accomplishment is a function of impaired self-efficacy as employees fail to meet their work standards (Demerouti et al., 2001). While researchers have recognized the benefits of positive psychology as it relates to individuals' strengths and human potential in organizations (Youssef-

Morgan & Bockorny, 2014), there continues to be a need to recognize negative states such as burnout and the associated adverse consequences.

Leadership as an Engagement Antecedent

Given that leaders are only leaders if they have followers (Drucker, 2004), it is logical to posit that employee engagement calls for leaders who know what employees value at work in order to translate this knowledge into employee-centered action. Understanding engagement antecedents, such as job resources within the JD-R model, enables leaders to develop evidence-based initiatives that can motivate employees to engage in work (Knight et al., 2017).

Researchers have found that employees' perceptions regarding specific leadership activities, such as fostering employee support and strategically aligning tasks with organizational goals, are positively related to higher levels of engagement (Biggs, Brough, & Barbour, 2014). However, Knight et al.'s (2017) meta-analysis of engagement suggested that leading engagement intervention outcomes are mixed, which indicates that context matters and that drivers of engagement are a function of the situation and specific organizational and employee needs (Briner & Walshe, 2015).

While employee engagement can improve individual and organizational performance, there are disagreements concerning the antecedents of engagement (Macey & Schneider, 2008). Furthermore, there is limited practical information rooted in empirical research regarding how leaders can develop engaged employees (Thompson et al., 2015). Schaufeli (2015) asserted that the JD-R model research has not adequately accounted for the impact leadership has on engagement or burnout. In prior JD-R model studies, leadership has been nominally included as a job resource or excluded as a variable (Breevaart et al., 2014). Given the advantages associated with employee engagement, researchers have sought to determine key drivers of engagement and to make these available to leaders as a means of fostering employee engagement

(Rich et al., 2010). Knowledge regarding leadership activities that promote or inhibit employee engagement at work could prove beneficial to organizational leaders.

Through his ethnographic study, Kahn (1990) sought to understand how personal experiences within the context of work influence personal engagement and disengagement. Kahn's theoretical engagement framework included the psychological conditions (e.g., psychological meaningfulness, psychological safety, and availability) that precede personal engagement. Similarly, Serrano and Reichard (2011) found that meaningful work and supportive leaders and coworkers can increase employee engagement. Ultimately, leaders are responsible for creating an organizational environment in which employees feel supported and safe and for providing employees with meaningful work.

E. E. Lawler (2007) used the resilient spiral framework to posit the antecedents of engagement and identify employee engagement as a mediating variable between its antecedents and organizational outcomes such as resilience. Like Kahn (1990), E. E. Lawler grounded his framework in the concept that psychological conditions can encourage or hinder engagement, which in turn affects individual and corporate performance. Christian et al. (2011) suggested that an employee engagement framework based on antecedents such as leadership, job attributes, and personal characteristics could be used to understand how these precursors motivate people to engage in their work and affect individual and organizational performance. While personal traits or positive views of work can influence an individual's motivation to engage at work (Macey & Schneider, 2008), leaders can significantly affect job characteristics, job resources, and ultimately employee engagement (Breevaart et al., 2014; Kahn, 1990).

Business leaders largely determine resource allocation within their scope of operations. Leaders routinely make decisions that affect groups and individuals within their organization, and their choices may influence employees' willingness to invest in their work. For example,

leaders typically control organizational resources and establish job requirements. Depending on the situation, these job resources and demands may change over time. Through empirical findings, researchers have suggested that job resources are positively related to employee engagement and that job demands and work engagement are negatively correlated (Bakker & Demerouti, 2007).

Within the JD-R model, employees' perceptions concerning available job resources can be motivational and ultimately can increase employees' willingness to invest themselves in their work (Rich et al., 2010). Notably, there has been limited research differentiating leadership and job resources in the context of work engagement antecedents (Schaufeli, 2015). Stated differently, engagement researchers have viewed leadership as a specific resource, not the source of crucial job resources. Because leaders are responsible for providing employees with relevant job resources, researchers must further explore the relationship between leaders' allocation or withdrawal of job resources and employee engagement.

Christian et al. (2011) suggested that leadership, job attributes, and dispositional traits affect work engagement levels. Job attributes that are positively related to work engagement include autonomy, job significance, task variety, feedback, and job complexity (Christian et al., 2011). According to Shuck and Herd (2012), leaders can create conditions that increase work engagement and decrease employee burnout. Leading employee engagement requires both motivational and skills-based leadership attributes in order to identify what job resources employees value and to create job characteristics that are meaningful to employees.

Leaders who empower their employees may foster engagement. Empowering leaders encourage "initiative, self-responsibility, self-confidence, goal setting, positive thinking and problem-solving" (Sims, Faraj, & Yun, 2009, p. 151). Empowering employees transfers ownership and accountability to those closest to work (McChrystal, Collins, Silverman, &

Fussell, 2015). Furthermore, empowering leaders can positively impact employees' perceptions of work demands and resources and, thus, engagement (Tuckey, Bakker, & Dollard, 2012). Researchers have linked the empowerment of employees to task ownership and responsibility, performance awareness, and commitment (Saunders & Tiwari, 2014) and to higher levels of productivity (Hargrove, Becker, & Hargrove, 2015).

Business leaders are responsible for communicating with their employees. Researchers have found that leaders who encourage employees to talk openly and who are interested in their employees' opinions can motivate employees to engage and thereby improve productivity (Ruck, Welch, & Menara, 2017). Specifically, employees' feelings about having a voice in their organization and having receptive leaders can influence their motivation to engage at work (Ruck et al., 2017). For example, leaders who encourage employees to provide feedback are more likely to engage their employees (Ruck et al., 2017).

As proposed by Jonassen (2015), organizational and team decisions and results can be improved through collaborative dialogue, which encourages the sharing of different viewpoints. Engagement is manifested when "employees speak-up and share constructive ideas that aim to improve or change the status quo" (Ruck et al., 2017, p. 2). Covey (1989) asserted that effective people first seek to understand others and then seek to be understood. Therefore, leaders should develop an inclusive organizational culture where people "enter conversations willing to listen to and respect others' opinions" (B. Allen, 2011, p. 190.).

Fragouli and Ibidapo (2015) asserted that leaders are responsible for successfully managing stressful situations and communicating in a manner that positively influences and motivates their employees to engage in their work. Research findings have indicated that employees' satisfaction with organizational communication is positively related to engagement (Jaupi & Llaci, 2015). Business leaders may choose to promote or inhibit corporate

communication, and their decision may impact the engagement of their employees. Although leadership and leader-employee interactions may positively influence workforce engagement, leadership as a driver of engagement has been underinvestigated (Blomme et al., 2015; Schaufeli, 2015; Xanthopoulou et al., 2009). Understanding the leader-employee engagement relationship and recognizing gaps in the literature have enabled researchers to conduct novel investigations that can advance scientific and practical knowledge and help leaders develop context-specific engagement strategies. Additional contextual research could enhance understanding of the impact leaders have on the engagement of their employees.

Employee engagement antecedents have been shown to change based on economic context (Wang, Lu, & Siu, 2015). Employee engagement antecedents include safety and security, which may be a function of organizational or national economic conditions (Wang et al., 2015). Organizational change based on weak economic conditions and uncertainty may lead employees to be primarily concerned about their job security, which may adversely affect employee engagement (Bakker & Demerouti, 2007; Kowske et al., 2009; Merry, 2013). Researchers have suggested that leaders who coach and mentor employees and show a genuine interest in employee development can motivate their employees to engage emotionally, cognitively, and behaviorally at work (Shuck & Herd, 2012). Wang et al.'s (2015) empirical findings, based on the survey responses of 140 Chinese employees, suggested that leaders who positively influence organizational justice can offset lower levels of job security and encourage higher levels of employee performance.

While substantial research addresses the antecedents of employee engagement, there is an opportunity to advance scientific and practical knowledge in the field of engagement leadership. It is evident that leaders can influence proximal engagement antecedents such as job control, leader and peer support, reward and recognition, and leader feedback (Brough et al., 2013).

Likewise, organizational leadership, culture, climate, and resources are distal engagement antecedents (Albrecht et al., 2015) that are in the realm of leadership responsibilities. For example, leaders can share power and include followers in the establishment of priorities and in decision-making, which may improve employee engagement and organizational outcomes (G. Allen & Dovey, 2016). Bakker and Demerouti (2007) asserted that leaders' performance feedback encourages personal development and self-efficacy and that decision-making empowerment and interpersonal relationships satisfy a person's need for autonomy and belonging, respectively. The development of an inclusive organizational culture may positively impact employee engagement.

Academic scholars' and practitioners' research findings have enhanced understanding of what motivates employees to engage in their work and organization and the relationship between leadership and employee engagement. Likewise, researchers have suggested that partially engaged or disengaged employees are less productive, which may lead to lower levels of profitability (Selmer & Luring, 2016). Researchers have also stressed the importance of context; therefore, leaders should assess their external and internal environments to create the conditions that encourage workforce engagement (Jenkins & Delbridge, 2013; Saks & Gruman, 2014).

Table 3 contains a list of engagement antecedents developed during the review of the engagement literature. While this list of engagement antecedents is substantial, it is not comprehensive. Rather than develop a list of common drivers of engagement, I intended to highlight in Table 3 the critical employee engagement antecedents that an organization's leaders directly or indirectly influence.

Table 3

Leader-Driven Job Resources as Employee Engagement Antecedents

Job resources that drive engagement	Citation
Salary–responsibility congruence (congruence between pay and job responsibility)	Schaufeli (2015)
Job security	Kowske, Lundby, and Rasch (2009)
Availability of career advancement opportunities	Thompson, Lemmon, and Walter (2015)
Training programs that stimulate personal growth, learning, and development	Saks (2006)
Productive interpersonal relationships with leaders and peers	Shuck and Herd (2012)
Clearly defined role	Kahn (1990)
Perception that the task is significant or the job is meaningful	Kahn (1990)
Challenging job that allows for task variety and autonomy	Crawford, Rich, Buckman, and Bergeron (2014)
Identification with the task	Rich, LePine, and Crawford (2010)
Constructive performance feedback from leader	Bakker and Demerouti (2007)
Encouragement of employees to participate in decision-making	Hornung, Rousseau, Glaser, Angerer, and Weigl (2010)
Receptive senior leaders who grant employees a voice in their organization	Ruck, Welch, and Menara (2017)
Proximal antecedents—job control, leader and peer support, recognition and rewards, and leader feedback	Brough et al. (2013)
Rewards, remuneration, and recognition	Merry (2013)
Employee empowerment	Tuckey, Bakker, and Dollard (2012)
Organizational communication	Jaupi and Llaci (2015)
Organizational support	Shantz, Alfes, and Latham (2016)
Distal antecedent—leadership, culture, climate, and organizational resources	Albrecht, Bakker, Gruman, Macey, and Saks (2015)

The Business Leadership Effect

A search for the term *engagement leadership* in ACU's online library resulted in no responses; therefore, I coined this term to emphasize both the potential effect that leaders have on employee engagement and their responsibility to engage employees. I propose that engagement leadership is a subset of leadership, which emphasizes the need to consciously consider employee engagement during the decision-making process. Engagement leadership

includes a focus on assessing an organization's internal and external environments and balancing job resources and demands to encourage employees to find meaning and safety in their work roles (Bakker & Demerouti, 2007; Kahn, 1990).

Business leaders are ultimately responsible for organizational performance and results and employees' workplace experiences (Hentrich et al., 2017). Business leaders can influence their firm's values, purpose and value proposition, and develop and implement strategies that affect short- and long-term financial results and organizational resilience. Leaders should recognize that the engagement of employees can facilitate higher levels of employee retention, productivity, and customer loyalty (Serrano & Reichard, 2011). Based on these leadership responsibilities, leaders should consciously consider how to engage their employees and the benefits of employee engagement during the decision-making process. As part of a broader strategy, leaders determine resource allocation and which groups and employees have access to the resources (Blomme et al., 2015). In this vein, leaders are responsible for assessing their organization's environment and capabilities (Bass, 2008) and deciding whether to empower employees and foster employee autonomy or to focus on systems and processes that limit employee autonomy and drive employee compliance. Ultimately, leaders determine the support, job freedom, and feedback employees receive, and these job resources can affect workplace engagement levels (Bakker & Demerouti, 2017; Blomme et al., 2015). Engagement leadership stresses the need for leaders to understand how their decisions impact workforce development and employee motivation.

While Kahn (1990) rightfully suggested that there are personal attributes that affect engagement, there are also psychological conditions or engagement antecedents that leaders directly and indirectly influence. Because effective leaders are more likely to have engaged employees (Folkman, 2017) and business leaders are ultimately responsible for prioritizing

projects to improve organizational performance, results, and sustainability (Koç et al., 2009), there is a need for research that adds to the existing engagement leadership research. Leading engagement is a unique and underinvestigated construct that may improve individual, team, and organizational results (Gallup, 2017; Harter et al., 2002; Merry, 2013; Shuck & Wollard, 2010). Insight into the relationship between adverse business conditions and leadership, as well as between leader-driven retrenchment business strategies and employee engagement, may provide business leaders with practical knowledge and add to the extant literature.

Researchers who have used the JD-R theoretical model have not emphasized leadership as a driver of job demands or job resources (Schaufeli, 2015); however, business leaders are responsible for establishing organizational goals (Gallup, 2017), which drive job demands and determine resource allocation to achieve both short- and long-term goals. W. Kim (2017), in a quantitative study of Korean organizations, investigated the effects of job resources on the relationships between employee engagement, performance, and turnover. The findings suggested that job resources were positively associated with employee engagement and performance and negatively related to employee turnover. Given that employee engagement is superior to employee disengagement and burnout in terms of individual and organizational outcomes, there is a need to examine the effects of business leadership on employee engagement across various contexts. It is also evident that leaders need to assess job demands and job resources across situations to determine which resources motivate employee engagement. Specifically, there is a need to understand how business leaders' allocation of job resources and demands during various economic conditions impact employees' feelings about job meaningfulness, psychological safety, and availability.

Notably, Carasco-Saul et al. (2015) asserted that the relationship between employee engagement and leadership has not been adequately studied. Business leaders need to know

which key levers will lead to employee engagement to enhance employee performance and well-being (Serrano & Reichard, 2011). While researchers have examined the relationship between leadership style and engagement and between leader resource allocation and engagement (Blomme et al., 2015; Schaufeli et al., 2006; Xanthopoulou et al., 2009), these studies do not adequately address how engagement leadership is affected by a significant economic downturn.

Leadership influence on engagement. Business leaders are responsible for the performance and outcomes of their employees and organization (Hentrich et al., 2017). Thompson et al. (2015) asserted that leaders could impact their employees' levels of hope, resiliency, efficacy, and optimism and could positively affect employees' level of engagement. Through this empirical research, Thompson et al. sought to provide leaders with case studies and to expand existing engagement frameworks with the inclusion of psychological capital. Positive psychological capital, as conceptualized by Luthans, Vogelgesang, and Lester (2006), is a person's situational assessment followed by positive feelings of success based on ability and resilience.

Thompson et al. (2015) suggested that there was a statistically significant and positive relationship between the positive psychological capital dimension, hope, and engagement. They asserted that leaders who communicate performance standards and expectations that align with employee capabilities could increase hope among employees. Their analysis also suggested that employees' assessment of decision-making autonomy, performance feedback, and task environment impacted employees' level of hope and engagement (Thompson et al., 2015).

Occupational self-efficacy is a person's feeling about his or her competence and ability to complete job-related tasks (Rigotti, Schyns, & Mohr, 2008). Self-efficacy is defined as an individual's confidence regarding his or her ability to successfully handle problems and tasks (Hentrich et al., 2017). Confident employees who are successfully working toward known goals

are more likely to be engaged in their work (Xanthopoulou, Bakker, Demerouti, & Schaufeli, 2007). After controlling for other factors that could affect employee efficacy such as education, job experience, and organizational experience, Thompson et al. (2015) discovered that there was a direct relationship between self-efficacy and engagement. Their research supported the need for leaders to make available crucial job resources such as task support, feedback, and training, and that these job resources had a significant and positive relationship with feelings of efficacy and engagement (Thompson et al., 2015).

Engagement calls for employees who have a desire to improve performance and manage their work in a productive manner that achieves desired results (Thompson et al., 2015).

Thompson et al. (2015) found that job resources can be instrumental in supporting employees who are experiencing challenges and can lead to higher levels of engagement and resilience. Furthermore, leaders may foster an organizational culture that encourages psychological safety and risk-taking to promote employee engagement. This finding indicated that supportive leadership was positively related to employees' feelings of resilience and engagement (Thompson et al., 2015).

Optimism refers to a person's perceptions of the likelihood that he or she will experience a positive outcome and "is a reflection of our belief in and experience of our own capacity for self-regulation of emotional states" (Vaughan, 2000, p. 34). Thompson et al. (2015) asserted that confidence and job autonomy are central to employee engagement. Confident and engaged employees believe that their cognitive, physical, and emotional investments will yield positive results. In other words, they are optimistic about their ability to perform successfully and that this performance will produce personal and organizational benefits. Thus, Thompson et al. found that optimism was directly and positively related to employee engagement. Leaders can nurture optimism or confidence by facilitating goal setting while allowing employees to be

responsible for achieving the goals. Cocreating goals that motivate people to improve performance and avoid setting unrealistic goals can motivate engagement. These findings suggested a positive relationship between job resources and support and employee feelings of confidence, empowerment, and engagement (Thompson et al., 2015).

In a quantitative study, Matta, Scott, Koopman, and Conlon (2015) sought to examine the relationship between leaders' and followers' perceptions of leader-member exchange (LMX) quality and employee engagement, organizational citizenship, and motivation. The researchers hypothesized that leaders' and followers' perceptions concerning LMX quality would influence employees' engagement and commitment to the organization. Students at a U.S. university recruited employees and their leaders to participate in the study. The researchers used a seven-item scale (LMX-7) to determine the leaders' and employees' perceptions regarding their LMX quality. Employees were surveyed using Schaufeli et al.'s (2006) nine-item scale to determine their level of job engagement.

Matta et al. (2015) indicated that employee engagement was greater when both the leader and employee had similar perceptions of LMX quality. Furthermore, the research findings supported the hypothesis that as the leader's and follower's perceptions of LMX quality diverged, employees would be less likely to engage in their work. This research emphasized the effect of the leader-employee relationship on employee engagement.

Although there is a need for further investigation of the relationship between leadership and employee engagement (Carasco-Saul et al., 2015), the existing literature is helpful in understanding the effect leaders have on engagement. Cenkci and Özçelik (2015) sought to extend previous research by exploring the relationship between democratic and autocratic leadership styles and workforce engagement. The researchers hypothesized that "there is a positive relationship between benevolent leadership style and follower work engagement, and

there is a negative relationship between authoritarian leadership style and follower work engagement” (Cenkci & Özçelik, 2015, pp. 11–12). They tested these hypotheses using the Paternalistic Leadership Scale to measure benevolent, authoritarian, and moral leadership, and the Utrecht Work Enthusiasm Scale to measure follower work engagement.

Cenkci and Özçelik (2015) used a quantitative cross-sectional design and convenience sampling to conduct their study. The study participants were limited to professional employees in Turkey, and the results were derived from a small nonprobability sample. The researchers suggested that work engagement was positively related to benevolent leadership and negatively associated with authoritarian leadership. Their findings emphasized the benefits of benevolent leadership as a set of behaviors that fosters engagement. Although authoritarian leaders may dictate activities and coerce employees into compliance, authoritarian leadership does not motivate employees to engage in work or change their behaviors (Cenkci & Özçelik, 2015). As posited by Maylett and Warner (2014), engaged employees can be a source of competitive advantage, as engagement can result in operational efficiencies, higher profitability, and ultimately higher shareholder returns.

Business leaders need to be competent, and employees need to be confident in their leaders. An integral component of gaining the trust of peers and subordinates is leadership competence, which includes knowing what to do, facilitating the development of novel solutions, and successfully implementing these solutions (Ulmer, 1997). According to Zhu and Akhtar (2014), leader-follower trust is a function of the leader’s knowledge, capability, dependability, and integrity. Employees assess their leaders’ competence and trustworthiness and evaluate the cost and benefit of genuinely supporting their leaders (van Dierendonck, Stam, Boersma, de Windt, & Alkema, 2014).

Leaders can address organizational challenges when they have established relationships with their employees and have invested in building leader-employee trust. Zhu and Akhtar (2014) asserted that leader-follower trust is created and sustained through a leader's actions that demonstrate genuine care and concern for followers. Beyond these professional competencies, leaders need soft, or people, skills such as relationship building, effective communication, and empathy to build strong leader-employee relationships (Barclay & Barclay, 2011).

Business leadership. Business leaders are ultimately responsible for organizational performance and outcomes, but employees are the vehicle through which work gets done. There are various definitions of leadership. Drucker (2004) posited that a leader is someone who has willing followers. Beyond this valid characterization of a leader, leadership is an iterative process that occurs between leaders and followers (Northouse, 2016). Northouse (2016) proposed that leadership is a process in which the leader influences followers to achieve organizational goals. The leadership process occurs during intentional leader-follower interactions (Northouse, 2016). Business leadership calls for skills and relational competencies. Business leaders need to be proficient in strategic planning, organizing, guiding, motivating, and ultimately, influencing employees toward shared goals (Barclay & Barclay, 2011). Leaders are meant to influence followers, which emphasizes the potential of both business leaders and employees to improve organizational performance.

Successful business leaders should have a positive impact on their organizations and contribute to organizational success. Recognizing the importance of organizational leadership, researchers have developed a portrait of various leadership styles. Common leadership styles include authoritarian, democratic or participative, transactional, transformational, laissez-faire, and situational (Bass, 2008). In today's volatile and competitive business environment, leaders increasingly rely on a knowledgeable and skilled workforce (Dekas, Bauer, Welle, Kurkoski, &

Sullivan, 2013). Given the increasingly volatile nature of business, Kotter (2001) suggested that authoritative leaders who leverage positional power will not be able to engage employees in their quest to improve organizational outcomes. In contrast, participative and democratic leadership styles are suited to addressing organizational challenges and engaging an increasingly diverse workforce (Chin, 2013).

To address emerging market challenges, leaders should continuously monitor and evaluate their industry and the broader economy (Bolman & Deal, 2013). Moreover, business leaders are responsible for making institutional changes based on relevant information to redirect their firm's activities based on emerging opportunities and threats (Katz, du Preez, & Louw, 2016). The ability to evaluate a situation quickly and accurately is a hallmark of successful business leadership (Bolman & Deal, 2013).

While leaders need to perform situational analysis to improve organizational performance, assessing situations and effectively leading in a volatile environment can be daunting. Economic challenges often require organizational change, which may require a different leadership style (Sims et al., 2009) as a means of enabling the organization to successfully confront new challenges and opportunities. Situational leadership emphasizes the need for leaders to be flexible and to recognize that various situations may call for different leadership styles to successfully influence employees (Bass, 2008). The situational leadership framework developed by Blanchard, Zigarmi, and Zigarmi (2013) indicates when leaders need to engage in directing, coaching, supporting, and delegating leadership based on employee competence and commitment. The situational framework emphasizes the need for leaders to assess situations and determine the needs of employees (Blanchard et al., 2013). A situational approach to leadership can enhance leaders' understanding of how their leadership style influences their employees' level of engagement. Macey and Schneider (2008) asserted that the

employee engagement literature has been focused on factors that improve individual and organizational performance and results, suggesting that situational variables and their associated leadership constraints have not been adequately considered.

Corporate leaders are being required to adapt to an environment that is increasingly dynamic, competitive, and volatile (Bazerman & Moore, 2013; Datta, Guthrie, & Wright, 2005). Today's highly competitive and unpredictable markets call for leaders who can skillfully execute organizational change initiatives and at the same time leverage their human capital in a manner that improves organizational outcomes (Datta et al., 2005; Rich et al., 2010). The present external environment is both complex and volatile, and these business attributes call for leaders and their organizations to plan and take steps that ensure organizational sustainability and competitiveness (E. E. Lawler, 2007).

Senior business leaders face myriad responsibilities, such as maintaining statutory compliance, improving profitability, developing value-add strategies, lowering costs, and encouraging employees to advance innovations and more effective processes (Griffin et al., 2015). In a recessionary environment, leaders tend to focus on controlling costs and improving organizational efficiency (Deloitte, 2017). While reducing costs and waste and increasing efficiency and productivity can be a corporate strength (Prewitt & Weil, 2014), these strategies are no longer enough to excel or to create a sustainable competitive advantage (McChrystal et al., 2015).

Drucker (1963) asserted that leaders of successful organizations focus on “doing the right thing,” whereas leaders of efficient operations stress the importance of “doing things right” (p. 54). Drucker (2004) also emphasized the need to have competent employees who have the skills to analyze their external environment, address potential challenges, and exploit emerging opportunities. Although efficient operations continue to be a fundamental business strength,

business leaders should also seek to leverage high-performing human assets to exploit opportunities (E. E. Lawler, 2007). As Kahn (1990) asserted, human resources need to be engaged before they are motivated to contribute beyond their job requirements.

Business leaders translate engagement information from scholars and consultants and develop and execute strategies to improve employees' attitudes toward work and to motivate discretionary effort (Truss et al., 2014). The goal of these initiatives is to enhance individual and organizational performance. While Schaufeli et al. (2006) suggested that employee engagement is a function of leadership, the impact that leaders have on employee engagement remains underinvestigated (Bedarkar & Pandita, 2014). Moreover, leading employee engagement across different business contexts is not well understood (Bakker et al., 2011; Jenkins & Delbridge, 2013; Saks & Gruman, 2014). Although employee engagement is considered a useful leadership strategy, there is little evidence that supports employee engagement improvement across time and situations or the causal effect of engagement on organizational performance and outcomes (Saks & Gruman, 2014). Furthermore, while work resources are positively related to employee engagement, there remains uncertainty regarding which activities leaders should focus on to best encourage engagement in a given situation (Saks & Gruman, 2014). Further contextual engagement studies may contribute to the existing literature.

The intersection of business context and engagement. The concept of employee engagement in business firms has interested practitioners, consulting firms, and academics (Macey & Schneider, 2008). However, Wefald and Downey (2009) contended that scholars and practitioners continue to view employee engagement differently. Bedarkar and Pandita (2014) asserted that employee engagement theories are not well understood. In light of the gap between practitioners who have emphasized engagement outcomes and academic researchers who have focused on developing engagement theories, investigating concepts and antecedents should

prove meaningful. Even though researchers have empirically tested and validated engagement concepts, antecedents, and outcomes, there is a need to further develop context-specific engagement antecedents and consequences (Bakker et al., 2011; Jenkins & Delbridge, 2013; Saks & Gruman, 2014). The concept of situational employee engagement continues to evolve and merits further scholarly study.

Christian et al. (2011) suggested that while employee engagement can lead to improved performance, there is a need to understand the uniqueness of engagement relative to job performance and context. Given the increasing demands placed on employees, business leaders are increasingly interested in engaging employees as a means to increase productivity and enhance profitability (Harter et al., 2002). Leadership responsibilities such as aligning employee capabilities with job responsibilities and setting expectations can motivate employees to engage at work (May et al., 2004).

Leaders and employees in business enterprises view economic crises as substantial organizational threats that require effective responses even as the level of uncertainty increases. Through their research into extreme contexts, Hannah, Uhl-Bien, Avolio, and Cavarretta (2009) found that economic downturns could change the leader-employee relationship as employees become more reliant on leaders to make decisions that improve individual and organizational outcomes. Moreover, the leader-employee relationship can change as followers look to their leaders to adapt the organization to a new reality and successfully adjust to the new environment (Hannah et al., 2009). Leaders may become overextended as they attempt to develop and execute plans that address their firm's financial distress. Despite the reoccurrence of economic recessions, there is a dearth of research on the leadership process during these challenging situations (dos Santos, Bandeira-de-Mello, & de Almeida Cunha, 2016).

Retrenchment Business Strategies

High levels of market and industry volatility have historically presented business leaders and their organizations with formidable challenges and new opportunities. Each year, many companies across the world are materially affected, and some cease to exist due to economic recessions. Reoccurring financial crises highlight the vulnerability of commercial enterprises that are experiencing environments that are “rapidly changing and where roles are less defined” (Dekas et al., 2013, p. 220). In a volatile, uncertain, complex, and ambiguous (VUCA) environment, leaders need to develop their organization’s capabilities, adaptability, and resilience (McChrystal et al., 2015). Financial and economic crises can place businesses and industries in peril.

Economic contractions occur periodically and challenge business leaders to develop and implement strategies that address financial uncertainty. Retrenchment business strategies are used to adapt to lower demands for products and services, depressed product and service pricing, and the resulting financial distress (Heifetz, Grashow, & Linsky, 2009). Researchers have characterized business retrenchment as actions that enhance organizational efficiency and lower costs through initiatives such as cost reduction, downsizing or rightsizing, corporate restructuring, business divestiture, exiting geographic markets, and tightening of financial controls (Heifetz et al., 2009; Tangpong, Abebe, & Li, 2015).

Economic factors can affect a business firm’s strategies and short-term goals. Economic volatility from macroeconomic factors such as changes in demands for products and services, tighter financial credit controls, and continued globalization of the world economies increasingly challenges business leaders (Lowth, Prowle, & Zhang, 2010). In economically challenging situations, business leaders often decide to focus on managing short-term profitability and cash flow during economic downturns (Deloitte, 2017). To offset significantly lower revenues,

leaders may employ retrenchment business strategies, and these strategies usually adversely impact the workforce. While reductions in force may negatively impact a business enterprise's industry reputation (Love & Kraatz, 2009), researchers have suggested that reducing staffing levels and overhead costs are typical actions initially taken in response to an economic recession (Lowth et al., 2010).

Industry-level economic contractions may be a function of competitive forces, macroeconomic factors, technical innovations, or political change (Datta, Guthrie, Basuil, & Pandey, 2010). An economic downturn in demand for services and products can create a hypercompetitive environment in which leaders are compelled to lower organizational costs to improve their firm's financial position and survivability (Deloitte, 2017). Retrenchment business strategies can be implemented to align organizational capabilities with significantly lower industry demand and to enhance a firm's financial standing (McManus & Mosca, 2015). Notably, researchers have suggested that retrenchment strategies are more beneficial if executed early in the economic downturn (Tangpong et al., 2015).

Asset divestitures and facility consolidation are levers available to senior business leaders during an economic downturn to account for low-profitability businesses (Denis & Rodgers, 2007). These retrenchment strategies may be product- or service-specific or may be a function of geographic location. For example, an economic downturn may impact specific regions more than others, which may influence leaders to close or consolidate facilities based on economic conditions within a geographic region (Denis & Rodgers, 2007). Typically, the consolidation or closure of facilities includes a reduction-in-force component, which can heighten surviving employees' job insecurity and negatively affect employee engagement (Kowske et al., 2009; Merry, 2013).

Although scholars and practitioners have substantiated the significant benefits of employee engagement, an adverse business environment can motivate senior leaders to prioritize activities around lowering organizational costs by implementing reductions in force. The execution of reductions in force can decrease costs for business firms in the short term (Love & Nohria, 2005); however, downsizing can negatively impact surviving employees' organizational commitment (Brockner et al., 2004). Job uncertainty and downsizing are demoralizing and stressful and may adversely affect employee engagement (Kowske et al., 2009). Moreover, the execution of retrenchment business strategies may limit near-term professional advancement opportunities and job security, which may undermine employee engagement (Bakker & Demerouti, 2007).

Self-evident in the term *retrenchment business strategies* is the understanding that leaders may execute strategies to retrench or economize. Although these strategies can impair future performance due to the loss of valuable intellectual capital (Hannan, Baron, Hsu, & Koçak, 2006), leaders may be compelled to implement these contextual strategies to improve their firm's near-term financial results and to increase the probability that the firm will continue to exist (Deloitte, 2017). The magnitude of an economic downturn affects leaders' decisions regarding business retrenchment and the level of uncertainty that resides in the organization. There are business environments in which aggressive retrenchment business strategies are financial necessities (Deloitte, 2017). Researchers have indicated that focusing on retrenchment strategies to offset lower revenue can improve organizational efficiency and enhance a firm's ability to adapt to challenging economic conditions (Mann & Byum, 2017).

While retrenchment business strategies have been used to help organizations survive during a deep industry contraction, these approaches have also significantly impacted the workforce (Merry, 2013). In contrast, employee involvement during the planning and execution

of reductions in force can result in higher levels of employee commitment (Martin, Parsons, & Bennett, 1995). Researchers have stressed the significance of creating and maintaining workplace engagement (Krishnaveni & Monica, 2016; Kumar & Pansari, 2016) and have developed antecedents of employee engagement (Bakker & Demerouti, 2007; Kahn, 1990; Saks, 2006). Slosberg, Nejati, Evans, and Nanda (2018) proposed that engaging employees in decision-making prior to and during organizational change could improve employee satisfaction and commitment.

Research regarding how leaders' implementation of retrenchment business strategies affects employee engagement is practically nonexistent. Thus, it is unknown how these adaptive strategies have affected leaders' ability to engage their workforce. Furthermore, researchers have suggested that the relationship between leadership and employee engagement has been underinvestigated (Blomme et al., 2015; Schaufeli, 2015; Xanthopoulou et al., 2009), and that contextual engagement research merits further study (Bakker et al., 2011; Jenkins & Delbridge, 2013; Saks & Gruman, 2014). Studies that link economically challenged business organizations, leadership strategies, and workforce engagement may lead to practical knowledge that is valuable to leaders.

Summary

Chapter 2 contained a review of the literature relevant to this study. The literature review was focused on employee engagement, the leadership-employee engagement relationship, and retrenchment business strategies and how these concepts are related. I included seminal engagement studies such as Kahn's personal engagement theoretical framework and the JD-R theory (Demerouti et al., 2001) to emphasize the relationships between work context and employees' motivation to engage. The literature review contained seminal and current articles that advanced the constructs, antecedents, and benefits of employee engagement and relevant

information regarding the relationship between leadership and engagement. I further divided the chapter into subsections to explore findings on the leadership-employee engagement relationship, the context of the research, and the practices common to retrenchment business strategies. The literature supports the need for further studies to advance understanding of the contextual leader-employee engagement relationship (Bakker et al., 2011; Blomme et al., 2015; Jenkins & Delbridge, 2013; Saks & Gruman, 2014; Schaufeli, 2015; Xanthopoulou et al., 2009).

The purpose of this research was to explore leaders' perceptions of the effect of leader-driven strategies on workforce engagement. Given this aim, I used empirical phenomenological research to examine the lived experiences of senior leaders with respect to a specific phenomenon: a highly challenging economic environment. As such, I used a qualitative research approach to gather contextual data relevant to the study's purpose.

Chapter 3: Research Method and Design

The general problem I investigated in this study is that while U.S. business leaders may recognize the organizational benefits of engaged employees, a large percentage of their employees are not engaged or are disengaged (Gallup, 2017). While scholars have suggested that employee engagement can lead to improved organizational performance and financial results (Harter et al., 2002; Merry, 2013), a significant percentage of U.S. workers are not fully engaged (Gallup, 2017). Given that levels of business volatility and competitiveness are increasing (Shuen, Feiler, & Teece, 2014; Tiwari & Lenka, 2016) and that business organizations are likely to experience periodic economic downturns, the specific business problem I investigated is the lack of understanding of how leader-driven retrenchment business strategies interact with leaders' ability to engage employees. Although business leaders recognize that they are responsible for engaging their employees (Popli & Rizvi, 2016), their focus on engagement may be affected by the need to develop and implement retrenchment business strategies.

The purpose of this qualitative study was to explore the experiences and perspectives of U.S. OFSE leaders regarding the interaction between their execution of retrenchment business strategies during a severe and protracted industry recession and their ability to engage their employees. The ultimate aim of this study was to develop practical knowledge that enhances engagement leadership practices and workforce engagement while executing retrenchment business strategies. I intended for the practical knowledge advanced in this study to help leaders successfully manage the disruptive forces associated with business volatility and capitalize on emerging opportunities through workforce engagement.

The central research question was, How do U.S. OFSE leaders' retrenchment business strategies within the context of a severe and protracted industry recession interact with their ability to engage their workforce? Through the central research question, I sought to gain insight

from OFSE leaders into their experiences with engaging employees while executing retrenchment business strategies. The study's context was an organizational financial crisis resulting from a severe economic downturn.

In this chapter, I describe and support the selection of a qualitative phenomenological research methodology. Phenomenological research is a study of lived experiences (van Manen, 1997). Here I present a description of the population along with the sample strategy and size. The proposed method of data collection and analysis are included, as well as the methods I employed to establish trustworthiness. My key responsibilities, such as being the instrument of inquiry, are covered in this chapter. Finally, this chapter contains ethical considerations that account for the merit of the study and the protection of the participants, as well as the research design assumptions, limitations, delimitation, and a summary.

Research Design and Method

This study was contextual in that I sought to explore the lived experiences of business leaders while they and their organizations faced significant economic challenges. Therefore, I employed a qualitative phenomenological research inquiry to gain insight from leaders whose experiences and ideas were relevant to the study's contextual phenomenon. Qualitative research methods can be used to understand the social and cultural context and people's actions and communication in that context (Myers, 2013). In a critical review of the literature, Rahman (2016) concluded that qualitative methods allow researchers to explore the behaviors, feelings, and understandings of participants and to gain significant insights. Moreover, a decisive benefit of qualitative research is that it "enables researchers to recognize and understand the context within which decisions and actions take place" (Myers, 2013, p. 5).

Quantitative researchers may take a positivist viewpoint and believe that the social world does not change and that reality can be objectively quantified (Rahman, 2016). In contrast,

qualitative researchers may have an interpretivist or constructivist philosophy and believe that reality within the social world can change and is best understood subjectively (Kroeze, 2012). My inquiry viewpoint aligns with the principles of interpretivism, naturalism, and realism, which leads to the selection of qualitative research or a research methodology focused on understanding the lived experiences of study participants (Ajagbe, Isiavwe, Sholanke, & Oke, 2015). Therefore, I used a qualitative viewpoint to guide this inquiry as I explored a significant problem and focused on individuals who had experienced the phenomenon (Creswell, 2014). Through this qualitative phenomenological research, I strove to cogenerate recommendations for organizational and societal change and improved outcomes (Creswell, 2014). Unlike qualitative research, quantitative research sacrifices contextual understanding in favor of generalizability, or the ability to generalize the findings across other groups (Myers, 2013). For these reasons, I employed qualitative phenomenological research methodology to gain contextual insights that would benefit leaders and organizations in the future.

Qualitative research designs include many different methods and approaches, and they produce findings from people's lived experiences (Terrell, 2016). As posited by Flick (2009), qualitative research develops subjective meaning through the gathering of nonstandardized data. Therefore, qualitative research is not purely statistical but instead relies on the analysis of texts and behaviors (Patton, 2015). Qualitative data may be collected by observing participants, interviewing participants, and reviewing texts and documents (Myers, 2013). Qualitative research is an inquiry into texts through which researchers seek to find meaning in the phenomena under investigation (Patton, 2015). In contrast, quantitative research methodology stresses the analysis of relationships between variables (University of Southern California Libraries, 2017).

As noted by Terrell (2016), the research design is a function of the researcher's paradigm. There are four components of a researcher's paradigm: axiology, ontology, epistemology, and methodology (Terrell, 2016). A definition of each of the components follows:

Axiology is a researcher's beliefs about what is ethical and valuable. Ontology is a researcher's beliefs about reality. Is there only one reality or are there multiple realities that we can construct? Epistemology is a researcher's beliefs about his or her role during the research process. Should he or she be actively involved or try to act as an observer? Methodology is based on the researcher's axiology, ontology, and epistemology, the methodology used to answer research questions or test hypothesis. (Neuman, 2011, p. 68)

Ultimately the study objective and the first three components of the researcher's paradigm—axiology, ontology, and epistemology—determine the research design (Terrell, 2016).

Selecting the research methodology—qualitative, quantitative, or mixed methods—is a crucial research decision that enables researchers to successfully address the research question and purpose (Creswell, 2014; Eriksson & Kovalainen, 2015). Traditional, positivist, and empirical paradigms lead to the selection of a quantitative research methodology, and constructivist, interpretive, historical, and postmodern paradigms call for a qualitative research methodology (Terrell, 2016). Based on the research question and the purpose of my study, the research methodology was qualitative and inductive rather than quantitative or deductive.

The qualitative, or interpretive, research approach I used was ideographic research, which is the study of specific events (Klein & Myers, 1999). Ideographic research enables researchers to gain insight from people's words and behaviors (Myers, 2013). Qualitative research methods allow researchers to explore and discover participants' contextual experiences and to determine how meaning is developed (Patton, 2015). Given the characteristics of qualitative research and the need to gain insight into the perspectives and feelings of senior leaders, I used a qualitative research approach to collect and analyze contextual data.

Considering the study's research question and purpose and the research paradigm, I used a qualitative phenomenological research methodology to understand the lived experiences of the

senior OFSE leaders. I also used a phenomenological methodology to focus the study and to learn from leaders' insight into a specific phenomenon (Henriques, 2014). Phenomenological research has been described as "the careful description and analyses of the subjects' life world and the meaning-making and understanding in the life world" (Flick, 2009, p. 472). Employing this methodology facilitated analysis of the relationship between leader-driven retrenchment business strategies and engagement leadership. Using a phenomenological research methodology can result in a profound understanding of participants' subjective experiences of a specific phenomenon (Terrell, 2016). Moreover, researchers have emphasized the usefulness of the truths that qualitative research produces (Schurink, Schurink, & Poggenpoel, 1998). Through this study, I sought truth in the shared experiences of leaders. Thus, I used the phenomenological research design to facilitate the discovery of truth.

Within the phenomenological research methodology, there is a need to practice *epoche*, or suspending judgment to "work within a phenomenological study with an open mind" (Terrell, 2016, p. 157). I am considered an insider, or someone with experiences similar to those of the participants; therefore, I practiced *epoche*, or bracketing, to "focus on the perspectives of other insiders" (Mouton & Marais, 1988, p. 70). Bracketing is the suspension of a researcher's beliefs or judgments so that he or she may see the phenomenon clearly and gain insight (Laverty, 2003). As proposed by Miller and Crabtree (1992), phenomenological research requires researchers to bracket their preconceived ideas, to enter the world of the participants, and to act as an experiencing interpreter. Having served as a senior leader at several OFSE firms, I strove to keep an open mind toward the data and to suspend biases and preconceptions during data collection and analysis.

A phenomenological research methodology calls for researchers to explore organizational life through the experiences of the study participants (Tomkins & Eatough, 2013) and requires

that researchers practice reduction to enable the qualitative data to speak for themselves. In the context of this research, reduction is recognizing and confronting one's assumptions and cognitions to understand the lived experiences of others (van Manen, 2014). Van Manen (2014) posited that the goal of reduction is to seek meaning and to be open to the experiences of others rather than rely on one's projections and assumptions. I sought to gain understanding through the experiences of individuals who had significant experiences of the study's phenomenon and were interested in participating in the study.

Alternative qualitative methodologies. Qualitative research design options include narrative research, phenomenological research, ethnographic research, case study research, grounded theory research, and content analysis (Eriksson & Kovalainen, 2015; Terrell, 2016). Each of these qualitative approaches has unique applications and is useful in specific situations. I employed the research methodology that was suited to the purposes of this study.

The goal of ethnographic research is to observe and analyze how people interact within their environment as a means of understanding a culture (Eriksson & Kovalainen, 2015). Hoolachan (2016) proposed that ethnographic research is a study of people's experiences within a culture over a prolonged time. Because the purpose of this study called for gathering data from leaders across multiple business enterprises, each with its own culture, and the study's focus was not on a cultural phenomenon, an ethnographic design was not appropriate. Furthermore, in contrast to ethnographic researchers who intentionally do not start with a theoretical framework (Eriksson & Kovalainen, 2015), I used a theoretical engagement leadership framework that conceptualized the relationship between engagement leadership and retrenchment business strategies.

Case study design enables researchers to analyze a specific case, such as a process or an event within an organization (Creswell, 2014). Whereas case studies are used to explore

activities, evaluate processes, and develop interventions that improve individual and organizational outcomes (Baxter & Jack, 2008), I strove to codevelop an understanding of how an adverse business context relates to engagement leadership across multiple organizations. Therefore, a case study design was not the best approach.

Narrative research may be used to explore and learn about a person's lived experience. In this study, I sought to explore the lived experiences of multiple senior OFSE leaders and to conduct thematic analyses; therefore, a singular focus on a person's experience was not suitable. Similarly, I did not use grounded theory, a design inquiry that is aimed at developing theory and theoretical concepts through empirical research (Eriksson & Kovalainen, 2015), because I was not attempting to establish a theory.

Through a phenomenological study, researchers attempt to gain new insight into the lived experiences of participants in a specific, real-life context (Gentles, Charles, Ploeg, & McKibbin, 2015). The research question and purpose of the present study warranted a focus on the lived experiences of senior OFSE leaders during a specific situation. Given the aim of this study—exploring leaders' lived experiences and perspectives to cogenerate knowledge of a phenomenon—I selected a phenomenological research methodology as the best approach.

Quantitative research, which uses deductive logic, allows researchers to measure variables that may then be examined using statistics (Rahman, 2016). Stake (2010) asserted that quantitative researchers seek to “nullify contexts in order to find the most general explanatory relationships” (p. 182). While quantitative findings may be useful, this study called for performing research that was contextualized and specific. The focus of this study required an exploration methodology that “emphasizes discovery, description and meaning rather than prediction, control and measurement” (Laverty, 2003, p. 21); therefore, I conducted qualitative research to “study the particular” and focus on how things work (Stake, 2010, p. 182).

Mixed-methods research can address the need to gather and analyze data systematically and the need to get the perspectives of stakeholders, which can lead to a deeper understanding of complex problems (Ivankova, 2015). Considering the research question and purpose and the need to focus on the lived experiences of specific individuals, it was evident that a mixed-methods approach was not the optimal research methodology.

Population

The target population was OFSE senior leaders who were responsible for engaging their employees and for developing and executing retrenchment business strategies in response to the financial adversity their organization experienced during the 2014–16 economic recession. Their participation required me to confirm their knowledge and understanding of the study and to document their consent.

Sample

Researchers are responsible for adequately selecting the sample size based on the research population (Wrench, Thomas-Maddox, Richmond, & McCroskey, 2013). A research population is the complete collection of people, objects, or observations, and a sample is a subset of this population (Wrench et al., 2013). A qualitative phenomenological inquiry calls for a sample size that is relatively small so that the researcher can conduct an intensive analysis of the data gathered from each participant and ensure that each participant's perspectives are meaningful to the study (O. Robinson, 2014). Therefore, a relatively small sample size enables the researcher to have the time needed with the participants to thoroughly explore their lived experience.

Creswell (2014) proposed that an appropriate sample size for phenomenological research is 3 to 10 participants. Similarly, Patton (2015) asserted that a phenomenological inquiry that explores the meaning of lived experiences calls for a purposive sampling and a sample size of

approximately 5 participants. Furthermore, the philosophical foundation of interpretative phenomenological research is best served by homogenous sampling (Smith, Flowers, & Larking, 2009). Although homogenous sampling enables study contextualization within a predefined situation (O. Robinson, 2014), the findings, which reflect a specific group's lived experiences, may not be generalizable (Mouton & Marais, 1988). Based on my analysis of the data and data saturation confirmation, the number of participants for this study was 10.

Qualitative sampling. O. Robinson (2014) proposed that sampling strategies include random, convenience, and purposive sampling. The present research design, a phenomenological inquiry within a specific context, called for participants who met the study participant selection criteria. Purposive sampling enables the researcher to ensure that participants meet the study's selection criteria (O. Robinson, 2014). The sampling strategy for this study was purposeful and targeted leaders who had experience with the research problem or phenomenon. In other words, the study participants were selected based on their relevance to the research question and purpose and thus were not part of a random sample of a general population (Flick, 2009). Flick (2009) proposed that the aim of qualitative research is not to reduce the complexity of the study by making use of predetermined variables, such as in quantitative analysis, but instead to study the complexity brought about by including context. The sampling objective was to collect relevant information and gain insight into the research problem (Creswell, 2014).

Senior leaders at OFSE firms who met the study's participant selection criteria, which included having been responsible for engagement leadership and having developed and implemented retrenchment business strategies to strengthen their organization's financial viability, were purposively selected. During my career, I have observed many OFSE leaders, but I recruited only those who met the selection criteria as study participants. Before embarking on

the study, I approached potential participants to determine their level of interest in participating, and these interactions suggested that recruiting participants who met the study's selection criteria would not be an issue.

A phenomenological qualitative study calls for participants who have experience with the study's phenomenon: namely, leader-driven retrenchment business strategies and leading engagement. Because a phenomenological inquiry does not yield generalizable findings (Smith et al., 2009), I employed a purposive nonprobability sampling strategy. Purposive sampling may be considered judgment sampling because the researcher selects participants based on an assessment of which participants are most appropriate to the study (Creswell, 2014).

The study's participant inclusion criteria included the following: (a) responsibility for workforce engagement and (b) responsibility for developing and implementing retrenchment business strategies to strengthen an organization's financial viability during the 2014–16 OFSE industry recession. A detailed sample profile of the participants is found in Table 4. I recruited OFSE leaders who met the selection criteria as study participants. Senior leaders outside the OFSE industry and leaders who did not meet the participant inclusion criteria were excluded from the study. There were no other exclusion criteria.

Table 4

Sample Participant Profile

Responsibilities and characteristics
Was a senior OFSE leader during the 2014–16 industry economic recession. Senior leadership titles included, but were not limited to, chief operating officer, president, vice president, and director.
Was responsible for the engagement of a sizable workforce (> 250 employees)
Was responsible for the financial performance of a sizable company, division, service line, or product line (> \$100 million annual revenue)
Developed and led the execution of retrenchment business strategies, and was responsible for the outcomes of these strategies
Had at least 5 years of experience as a senior OFSE leader

Note. There were no inclusion or exclusion selection criteria beyond the characteristics provided in this table.

M. Cohen, Kahn, and Steeves (2000) proposed that the sample size may change if it is determined that other participants would enhance the validity of the findings. Once my analyses indicated that data saturation had been confirmed and that further data gathering would not enrich the findings, data collection stopped (O. Robinson, 2014). Data saturation occurs when collecting new data does not produce new insights that are useful to the study or the point at which additional information becomes redundant (Charmaz, 2006; Gentles et al., 2015). Some researchers have argued that there is ongoing potential for the emergence of new insights from new data and intensive analyses (Strauss & Corbin, 1990), which suggests that saturation may be viewed in terms of diminishing returns on effort. While full data saturation may prove elusive (Strauss & Corbin, 1990), personal and institutional constraints suggest that qualitative research should terminate as data saturation is approached. The sample size of 10 participants was not changed.

Materials/Instruments (Qualitative)

The most common and essential procedure for gathering qualitative data in a business environment is the interview (Myers, 2013). Observations are also a qualitative data collection instrument (Terrell, 2016) and were included in the collection and analysis of the data for this study. As the researcher, I was the principal data collection instrument (Ajagbe et al., 2015), and interviewing participants was my primary means of collecting data.

Researchers are responsible for developing an interview protocol to facilitate the interview process and to scientifically gather data. The interview protocol includes not only the interview questions but also a script of what will be communicated to the participants before and after the interview (Jacob & Furgerson, 2012). Moreover, the protocol assists the researcher in staying on task and completing critical steps in the interview process such as gaining informed consent (Jacob & Furgerson, 2012). In a phenomenological qualitative study in which the

researcher seeks to explore the lived experiences of participants, the interview process may include up to three 45- to 60-minute interviews with each participant. While the first interview is conducted face-to-face, follow-up interviews may be conducted via phone or video conferencing.

An interview protocol was used to ensure that relevant and substantial data were collected (Terrell, 2016). The interview protocol included predetermined, open-ended questions that allowed the participants to describe their experience and share insights. In other words, the interviews facilitated an understanding of the participants' "motivations and their rationale as to why they did certain things" (Myers, 2013, p. 81). As posited by Myers (2013), people skills such as relating to and empathizing with the participants are essential during the interview process. I reflected on my interactions with participants during and after the interviews to learn and improve the interviewing process and outcomes.

The development of an interview protocol includes the selection of an appropriate interview approach that enables the researcher to collect useful data (Jacob & Furgerson, 2012; Terrell, 2016). Interview approaches include a structured or focused interview, a semistructured interview, and an unstructured interview (Flick, 2009; Terrell, 2016). Terrell (2016) asserted that a structured interview is appropriate when the researcher is very familiar with the study phenomenon and can develop interview questions that are focused on collecting interest-specific data. While I am very familiar with the problem and purpose of the study, I have decided to employ a semistructured interview approach. A semistructured approach gives the researcher the latitude to ask follow-up questions to the scripted open-ended questions to potentially expand the amount and type of data (Terrell, 2016). Likewise, because I am very familiar with the research context and aims, I did not use an unstructured interview approach, which may lead to participants describing unrelated and immaterial experiences (Terrell, 2016). As a means of ensuring that the interview questions produced substantial participant responses, I conducted two

pilot interviews. I transcribed and analyzed the pilot interviews to determine the effectiveness of the interview questions relative to the research question and purpose. Based on the relevant enriched data collected during the pilot study, I did not modify the interview questions.

Phenomenological research requires capturing rich descriptions of people's experiences and the setting in which these experiences occurred (Kensit, 2000). During the interviews, the researcher uses field notes "to capture what I hear, observe, experience and think" (Groenewald, 2004, p. 48). Given that within a phenomenological inquiry, researchers cannot entirely detach from their beliefs and biases (Hammersley, 2000), I sought to differentiate between the field notes that were descriptive and those that were reflective (Groenewald, 2004). I documented my personal biases and opinions before the participant interviews to ensure that I was aware of these presuppositions in order to facilitate bracketing and to encourage reduction or openness to the data.

Before initiating the interview process, I sent each participant an informed consent form that included information about the study's purpose, the risks and benefits of participation in the study, and the steps I would take to protect the participants' confidentiality and privacy. Participants voluntarily chose to participate in this research study, and those who decided to participate were required to sign the informed consent form prior to being interviewed.

The participants' interviews were audio recorded. I used redundant audio recorders and batteries during the interviews to ensure that there were no data collection interruptions. During the interviews, when listening to the recordings, and while transcribing the interviews, I bracketed my identified personal biases so that participants' truth would be heard (Mouton & Marais, 1988). Afterward, participants received a copy of their transcript and were asked to verify their responses and to revise if necessary. This member-checking step in the research

process gave participants the opportunity to validate that the transcript reflected their perspectives regarding the study phenomenon.

Qualitative Data Collection and Analysis Procedures

I collected the data for this study through interviews with participants who had valuable information relative to the study's problem and purpose. Research interviews can provide meaningful and context-specific data that describe the participants' experiences (Castillo-Montoya, 2016). As the researcher in this qualitative study, I served as the data collection instrument (Ajagbe et al., 2015). Therefore, I recognized the need to patiently and carefully listen to the participants as they communicated their lived experiences (Castillo-Montoya, 2016).

The goal of the qualitative data collection or interview protocol is to ask questions to gain information that relates to the research question and purpose (Patton, 2015). The interview questions are meant to encourage participants to enter into a conversation regarding their relevant experiences and perspectives (Castillo-Montoya, 2016). By concentrating on the participants' experiences, qualitative researchers attempt to guide the participants in the process of sharing their lived experiences (Seidman, 2013). The interview protocol for this study facilitated a disciplined approach to collecting useful data.

It is crucial that the data analysis process is consistent and disciplined (Laverly, 2003). After conducting the interviews, I transcribed and studied the transcripts. As proposed by Colaizzi (1978), I read each participant's descriptive transcripts and searched for significant statements. I highlighted significant statements and returned the transcripts to each participant to validate his or her answers and provide feedback regarding the importance of the highlighted comments (Laverly, 2003). After receiving participant feedback, I further coded the texts.

The phenomenological inquiry analysis began with first-cycle, or initial, coding, which enabled me to summarize the qualitative data (Saldaña, 2016). While there are many first-cycle

coding methods, concept coding was the best match for this phenomenological study. Strauss and Corbin (2015) posited that concept coding could be used to carry out phenomenological research studies; therefore, I used concept coding during the initial data coding process.

In the analysis of qualitative data, a concept may be a phrase or a word that works to represent the meaning of the data (Saldaña, 2016). In other words, concepts suggest a larger idea instead of a specific behavior or event (Saldaña, 2016). For example, process-related business concepts, such as technology and the economy, may be used as initial codings to capture a more comprehensive idea (Saldaña, 2016). The description of behaviors or actions can lead to more substantial and significant patterns or classifications; therefore, phenomenological research relies on the researcher's insights as he or she analyzes the data as a whole and categorizes concepts or units of meaning from the participants' description of the phenomenon (Giorgi, 1985). Saldaña (2016) asserted that first-cycle coding is part of the overall taxonomy, which leads to substantial categories and ultimately a limited number of themes.

Saldaña (2016) posited that the goal of secondary coding is to develop categories from the initial codes. Secondary coding calls for reorganizing the first-cycle codes to create a "smaller and more select list of broader categories, themes, concepts, and assertions" (Saldaña, 2016, p. 234). The categories developed during second-cycle coding are meant to become the principal components of the study. In this study, systematic coding was employed to categorize themes for analysis (Creswell, 2014).

While there are multiple second-cycle coding methods available to qualitative researchers, I selected pattern codes for this study to identify emergent concepts, themes, and explanations (Saldaña, 2016). Given the study's research question and purpose, I recognized the need to explore how context relates to engagement leadership. Pattern coding enables researchers to examine patterns of human relationships and to search for explanations in the data.

Ivankova (2015) asserted that following the coding of concepts, researchers could inductively develop themes from the reoccurring concepts. As posited by Raddon, Raby, and Sharpe (2009), coding can facilitate understanding and can be used to develop significant findings from the data; the analyses conclude when data saturation is reached.

Given that there is little existing research on the interactions between leaders' execution of retrenchment business strategies during a significant economic downturn and their ability to engage employees, descriptive phenomenology may prove insightful and valuable (Morrow, Rodriguez, & King, 2015). I employed Colaizzi's seven-step process to rigorously analyze and "stay close to the data" (Morrow et al., 2015, p. 643). This phenomenological research analysis depended on participants' collective, rich first-person descriptions of their experience, which were gathered predominantly through face-to-face interviews (Morrow et al., 2015).

Colaizzi's qualitative phenomenological data analysis approach as used in this study is found in Table 5. Colaizzi (1978) proposed that researchers develop a comprehensive description and structure of the study phenomenon. Similarly, van Manen (2014) posited that phenomenological research should describe the essence or structure of the phenomenon. I coded the underlying meaning of the participants' significant statements so that they reflected an exhaustive description (Shosha, 2012). Colaizzi's systematic and rigorous method of analyzing the data resulted in the emergence of core themes and subthemes that describe the essence and structure of the study phenomenon. As part of the data analysis, I submitted my findings via email to each of the main study participants to validate the descriptive results.

Methods for establishing trustworthiness. A qualitative research methodology is meant to be disciplined, systematic, rigorous, and critical, and these characteristics suggest that this type of research is scientific and credible (Dana & Dana, 2005). In a qualitative design approach, the researcher is the data collector; therefore, rather than focus on reliability and

Table 5

Integration of Colaizzi's (1978) Phenomenological Data Analysis Process With Coding Methods

Step no.	Description	Coding description
1	Read participants' transcripts multiple times to gain an overall sense of the content.	
2	Locate significant statements that are relevant to the study phenomenon. Record these statements and note the transcript page and line numbers.	Color code significant statements.
3	Develop meanings from the significant statements.	Use conceptual coding—phrase or words that work to represent the meaning of the data—to develop meaning.
4	Sort the meanings developed in Step 3 into categories.	Use pattern codes to identify emergent concepts, themes, or explanations.
5	Integrate the findings of the study and develop a comprehensive description of the study phenomenon.	
6	Describe the fundamental structure of the phenomenon.	
7	Submit the findings to the study participants to validate the descriptive results.	

validity as a quantitative design requires, a researcher conducting a qualitative study focuses on the trustworthiness of the study (Terrell, 2016). Trustworthiness is a function of the study's credibility, generalizability, soundness, and consistency (D. Cohen & Crabtree, 2006; Guba, 1981).

Credibility in a qualitative study is similar to internal validity in a quantitative research design. Credibility is established when the researcher's findings are "believable or credible from the perspectives of the study participants" (Terrell, 2016, pp. 173–174). Patton (2015) posited that credibility within a qualitative study is a function of the researcher's integrity, openness to the data, and ability to recognize patterns in the data and to integrate the data. The researcher must be aware of his or her biases and presumptions and systematically search for "alternative themes, divergent patterns, and rival explanations" to enhance the credibility of the study (Patton, 2015, p. 653).

Member checking is a crucial qualitative research process that empowers participants to review and revise their responses to interview questions, which can improve the study findings (Harper & Cole, 2012). Researchers employ member checking, or participant validation, to increase data accuracy and to improve the credibility and validity of the collected data (Barbour, 2001). Enabling the study participants to assess the accuracy of the researcher's summarization of their voice and the authenticity of the data findings enhances the trustworthiness of the data (Creswell, 2014). The goal of member checking is to substantiate the participants' responses and to increase the study's validity (D. Cohen & Crabtree, 2006).

As suggested by McConville, Arnold, and Smith (2016), I addressed transferability by providing participant, contextual, and industry information, which enables other researchers to make judgments regarding the applicability and transferability of the findings across other situations. Considering the high rates of volatility being encountered in the present business environment (Bazerman & Moore, 2013), the study's findings may be applicable in different geographic regions and industries.

Terrell (2016) asserted that dependability is a function of the repeatability of the research and the consistency of the results. The dependability of a qualitative research design is increased by employing practices that produce similar results when consistently conducted with the same participants in the same situation (Shenton, 2004). I have accounted for dependability through the sharing of relevant information, such as the interview protocol and the description of the analysis technique.

I committed to exploring approaches that ensured the findings would be trustworthy from the perspective of the participants and others who may rely on the research findings. Shenton (2004) proposed that the trustworthiness of the research findings and process is a crucial consideration in qualitative research. Thus, in this study, I addressed issues relating to

credibility, generalizability, soundness, and consistency, or the overall trustworthiness of the data and findings.

Researcher's role. I was responsible for gathering data, which required gaining access to participants within organizations (Eriksson & Kovalainen, 2015). As proposed by Eriksson and Kovalainen (2015), there are benefits to the researcher choosing individuals and organizations that he or she knows. I have worked with many OFSE senior leaders. For this study, I selected business leaders as participants based on their engagement leadership responsibility and their experience leading organizations during severe and protracted economic downturns.

Having served as a senior leader at three multinational OFSE firms and having experienced multiple industry recessions, I may be considered an insider relative to this study. Eriksson and Kovalainen (2015) proposed that being an insider could be advantageous but that previous experiences or biases may skew data gathering and analysis. Researchers have emphasized the importance of practicing *epoche* as a means of suspending judgment based on biases and perceptions from prior experiences with the study phenomenon (Carter & Baghurst, 2014). Therefore, it was necessary for me to reflect on my preconceived beliefs about engagement leadership and retrenchment business practices and to practice *epoche* to avoid preemptively taking a position either for or against the participants' way of thinking.

Researchers should present themselves as academic scholars and subject matter experts (Eriksson & Kovalainen, 2015). Although the purposively selected participants (senior business leaders) are often assertive, the researcher is accountable for leading the research process and for data analysis (Eriksson & Kovalainen, 2015). During the research, I reflected on my biases and on the relationships with the participants to properly leverage the benefits of having an insider position and to heighten awareness of presuppositions.

During data collection, I was disciplined and consistently followed the interview protocol. The protocol gives the process structure and guides the researcher's exploration and the participants' responses to improve the quality of the data (Castillo-Montoya, 2016). As part of the interview protocol, it is crucial that researchers communicate the aim and process of the study as a means of full disclosure (Castillo-Montoya, 2016). Researchers are responsible for the data analysis and the accurate presentation of findings, which motivated me to be disciplined and to keep an open mind during the interview and analysis process.

Pilot study. Given the significance of the researcher's role in qualitative research and the need to establish trustworthiness, I conducted a pilot study prior to the main study. A pilot study enables researchers to evaluate their interview and observation skills and assess the suitability of the planned research methodology (Y. Kim, 2011). Beebe (2007) asserted that researchers could use pilot studies to self-assess their preparation, competence, and commitment to the study methodology. Furthermore, a pilot study may improve the researcher's data collection and analysis skills and enhance the credibility of the researcher's findings (Padgett, 2008).

For this research, the pilot study was a limited version of the planned study used to inform the primary research (Wray, Archibong, & Walton, 2016). The pilot study enabled me to evaluate my data-gathering and analysis methods and to practice and improve my research skills before conducting the primary research (Doody & Doody, 2015). Moreover, implementing a small-scale version of the study before the main research allowed me to assess the participant recruitment process and the accessibility of participants who met the study's inclusion criteria (Y. Kim, 2011).

Researchers who have limited experience in conducting research may leverage pilot studies to evaluate and refine their interview skills, including actively listening, taking field notes, and being sensitive to the interviewees (Y. Kim, 2011). As posited by Chenail (2011),

qualitative researchers develop open-ended questions that are specific to the study and facilitate interviews to create context in order to encourage the participants to share rich data based on their relevant experiences. Therefore, I used a pilot study to assess the effectiveness of the interview questions and proposed methods. Y. Kim (2011) proposed that researchers can use pilot studies to uncover research process improvement opportunities, and this information can lead to significant changes to the main study. Morin (2013) asserted that a pilot study is an essential component of sound research. A pilot study may lead to changes in the interview protocol, such as the data collection and participant recruitment process (Wray et al., 2016).

Ethical Considerations

In preparing to conduct research with human participants, I completed the National Institutes of Health (NIH) Office of Extramural Research's Protecting Human Research Participants course. Before gathering data for this research, I gained approval from ACU's Institutional Review Board (IRB). Given that unethical research has been conducted in the past, I was motivated to ensure that participants would not be harmed during or after participation in my study. I committed to following the regulations posited in *The Belmont Report* (U.S. Department of Health and Human Services, 1979). The ethical principles posited in the report include participant respect, fairness, and consideration. The ultimate goal of these established principles is to protect research participants (U.S. Department of Health and Human Services, 1979).

Based on these ethical principles, I recognized the need to ensure that participants understood the risks and benefits of participating in this research. Moreover, I did not attempt to unduly influence potential participants' decision regarding their study participation. Given the study's research question and purpose, participants did not include anyone from a group that requires additional protection, such as people with diminished capabilities, children, pregnant

women, or people who are imprisoned. Furthermore, my research goals aligned with the principle of beneficence, which emphasizes the need to refrain from harming others and to engage in substantive research. The last ethical principle posited in *The Belmont Report* (US Department of Health and Human Services, 1979) is justice, which proposes that researchers treat people fairly and equitably. This study did not include participants who are vulnerable. Instead, the phenomenological research design called for participants who were professionals and who would likely expect the researcher to abide by high ethical standards.

As posited by U.S. Department of Health and Human Services Regulation, 45 C.F.R. § 46.120 (2018), risks to study participants must be assessed and provisions must be made to counter these risks. Furthermore, the researcher must evaluate the study's benefits to others and the participants and must understand the significance of the research. As proposed by Creswell (2014), researchers should ensure that the proposed research is beneficial and should communicate the purpose of the study to potential participants. Moreover, researchers should refrain from coercing individuals or groups to participate in the study and should respect the participants' cultures and perceptions (Creswell, 2014). This study was framed by a researcher-participant relationship based on honesty, mutual trust, and respect.

The senior OFSE leaders made their own decision regarding their participation in the research. Informed consent is an ethical principle that proposes that research participants "should be given the choice of whether they want to participate in a research project" (Myers, 2013, p. 253). Prior to being formally accepted as a participant in a study, an individual must understand the study's purpose, risks, and benefits and must sign the informed consent document.

Assumptions

While certain beliefs enabled me to conduct this research, some of those beliefs may be characterized as assumptions or unprovable (Simon & Goes, n.d.). This qualitative phenomenological inquiry included basic, foundational assumptions. The first was that a phenomenological research methodology would enable me to gain a deep comprehension of the phenomenon through an intense curiosity and analysis of the participants' responses and meanings related to their experiences of the event (Gallagher & Zahavi, 2007).

The second assumption was that participants would respond to interview questions based on their lived experiences as senior leaders during a severe and protracted economic downturn. While a common assumption in qualitative research is that participants will respond to the interview questions factually and honestly (Simon & Goes, n.d.), there is a risk that participants will not be forthcoming or will not respond candidly and truthfully. The third assumption was that participants would believe the preinterview assertion that I was committed to guarding their confidentiality and that this assurance would encourage the participants to speak openly and candidly as they shared their experiences and insights.

The fourth assumption was that the participants would answer the interview questions based on their experiences and would not be adversely influenced by the researcher-participant relationship. I ensured that the participants felt comfortable speaking openly and made it clear to the participants that they could decide to exit the study at any time. Furthermore, participants were advised that if they chose to exit the study, their information would not be used.

Qualitative research designs may not contain a set of research assumptions because research findings are known to emerge from the data and are unpredictable (University of Southern California Libraries, 2017). However, the qualitative research design used in this study included a theoretical framework. The conceptual framework acted as a guide to conceptualizing

the relationships that exist between organizational context, leadership, and the engagement of employees. Grounded by Kahn's (1990) personal engagement theoretical framework and the JD-R theoretical model (Bakker & Demerouti, 2007), I developed a unique conceptual framework as a guide to conceptualize the relationships that exist between organizational context, leadership, and the engagement of employees.

The theoretical framework included the conceptual relationship that exists between leader-driven job demands and resources and employee engagement in both a steady-state economic environment and an environment in which the organization is experiencing substantial financial adversity. Within this theoretical framework, I assumed that employees would assess their new work environment and the potential emergence of increasing job demands and lower levels of job resources in order to determine their level of motivation to engage at work (Bakker & Demerouti, 2007; Kahn, 1990).

Limitations

Limits of scholarly research should be made explicit and may include constraints such as the researcher's biases or complications beyond the researcher's control (Simon & Goes, n.d.). For example, participants' responses to the interview questions may introduce biases and error into the study (University of Southern California Libraries, 2017). These biases include selective memory, telescoping, attribution, and exaggeration (University of Southern California Libraries, 2017). Self-reported data may be a limiting factor in that the data may not be verified independently or the data may be biased (University of Southern California Libraries, 2017).

Given the density of senior OFSE leaders located in the Houston metroplex, all but one of the participants were in the Houston area. Given that the data collection and analysis were influenced by my decision to employ a nonrandom, purposive sampling approach based on study-centric participant selection criteria, the study findings may not be generalizable. The

study's purposive sampling was intentional in that it included individuals who had experienced the phenomenon and could share their relevant insights. However, the deliberate selection of participants may have led to results that may not reflect the population of OFSE leaders or business leaders in general (Terrell, 2016). Moreover, the concentration of OFSE leaders located in the Houston area may affect the findings' generalizability (Terrell, 2016).

I have served as a senior leader in the OFSE industry during an economic downturn, hence my intense interest in cogenerating scientific and practical knowledge that may help business leaders understand how their implementation of retrenchment business strategies interacts with their engagement of employees. These leadership experiences and scholarly pursuits have created personal biases that may place limitations on the analysis of the data. There is a need to be self-aware and to recognize how these biases and presumptions affect the findings. I practiced *epoche*, which calls for the setting aside of preconceived ideas and solutions and letting the data speak for itself (Carter & Baghurst, 2014).

My paradigm or worldview after many years of work is constructivist and interpretive, and this paradigm influenced my decision to use a qualitative research methodology (Terrell, 2016). While qualitative methods allow researchers to gather rich information (Patton, 2015) and to contextualize information (Madden & Bailey, 2017), this approach may produce findings that are difficult to test with a follow-up quantitative analysis.

Delimitations

Researchers are responsible for directing and concentrating scholarly research, which requires that they establish parameters regarding what will be studied, including the study's purpose and population (Simon & Goes, n.d.). To focus on the research problem and to control for factors that may adversely affect the study's findings, researchers should deliberately include delimitations (Terrell, 2016). The following delimitations served these purposes.

The first delimitation of this study was the potential impact of each OFSE firm's financial viability and market position on leader-driven retrenchment business strategies and the motivation of employees to engage at work. During the 2014–16 industry recession, economic constraints may have varied across the participants' business enterprises, and these factors could have affected leaders' retrenchment business strategies and their perceptions regarding their employees' engagement.

The second delimitation was the potential for economic variances across geographic regions. The economics of extracting or producing oil and natural gas are not homogeneous, which suggests that regional economic differences could have influenced the leaders' selection and intensity of retrenchment strategies and the pro-engagement resources available to leaders. A business enterprise's financial strength or weakness may affect leaders' ability to leverage job resources to engage employees and employees' motivation to engage in their work (Bakker & Demerouti, 2017); however, in this study I did not explicitly set out to examine these relationships.

The third delimitation was the positive relationship between the personal characteristics of employees and their personal resources such as organizational self-esteem and self-efficacy and employee engagement (Xanthopoulou et al., 2007). Although employees' resources can influence the effect the work environment has on their motivation to engage in their work (Demerouti & Bakker, 2011), I did not explore this relationship in this study. Nevertheless, employees' resources and attributes may have influenced the participants' perceptions of employees' ability to engage their workforce.

Lastly, the sample population was delimited by employing purposive sampling based on the attributes of the participants. The phenomenological inquiry was confined to conducting in-depth semistructured interviews with senior OFSE leaders who were responsible for their firm's

or business unit's financial performance and workforce during the 2014–16 oil and gas industry economic recession. The participant selection criteria produced a homogenous sample. As proposed by Smith et al. (2009), the philosophical foundation of a phenomenological research methodology supports the use of homogeneous sampling.

Summary

The purpose of this qualitative study was to explore the experiences and perspectives of U.S. OFSE leaders regarding how they engaged employees and how their execution of retrenchment business strategies during a severe and protracted industry recession interacted with their ability to engage their employees. Because effective leaders are more likely to have engaged employees (Folkman, 2017), the ultimate goal of this study was to develop practical knowledge that enhances engagement leadership practices and workforce engagement even while executing necessary retrenchment business strategies. The practical knowledge advanced in this study is meant to help leaders successfully manage the disruptive forces associated with business volatility and to capitalize on emerging opportunities.

My research paradigm or worldview after many years of work is constructivist and interpretive, which led me to approach my problem and purpose with a qualitative research methodology (Terrell, 2016). Although quantitative research can add to the existing body of scientific and practical knowledge, my view is that the working world is messy and dynamic. Each situation is different, and each decision carries with it intended and unintended consequences. Gathering and analyzing qualitative data gives researchers the opportunity to look into the messiness and understand the important perspectives of those involved. As posited by Schurink et al. (1998), qualitative research enables the development of contextual truths.

Based on the research question and purpose, I employed a phenomenological research methodology to gain insights from purposively selected participants. The participants were

senior OFSE leaders who had experienced the study phenomenon. Through this study, I sought to develop themes that reflect how leaders make sense of their feelings (McConville et al., 2016) about employee engagement and their responses to economic adversity via retrenchment business strategies. I sought to uncover relevant contextual understanding rather than attempt to develop universal truths. As posited by McConville et al. (2016), a phenomenological methodology can be used to identify what participants feel and how they interpret their experiences. I sought truth in the expressed experiences of leaders, and the phenomenological research design facilitated the discovery of contextual truth.

I have had the opportunity to serve as a senior leader at several multinational OFSE companies during severe and protracted economic downturns. Although researchers have asserted that semi-ignorance of the literature can be valuable (Gioia, Corley, & Hamilton, 2013), my leadership and engagement experiences and education may preclude this study from being purely inductive. However, my goal was to bracket myself and to let the data speak for themselves. Terrell (2016) proposed that within the phenomenological research methodology, there is a need to practice *epoche*, which enables the researcher to suspend judgment and to work with an open mind. I intended for this qualitative study to reveal unexpected and novel themes that add to the extant literature.

Chapter 4: Results

The purpose of this qualitative phenomenological research study was to explore the lived experiences and perspectives of U.S. OFSE leaders regarding how their execution of retrenchment business strategies during a severe and protracted industry recession interacted with their engagement of employees. The ultimate aim of this study was to develop practical knowledge that enhances engagement leadership practices and workforce engagement while executing retrenchment business strategies to improve financial sustainability. The practical knowledge advanced in this study was meant to help leaders successfully manage the disruptive forces associated with business volatility and to capitalize on emerging opportunities through workforce engagement.

Relative to the study's purpose, the central research question was, How do U.S. OFSE leaders' retrenchment business strategies within the context of a severe and protracted industry recession interact with their ability to engage their workforce? The central research question facilitated insights from senior OFSE leaders about their experiences of engaging employees while concurrently executing retrenchment business strategies. The study's context was a financial crisis during a severe and protracted economic downturn.

Chapter 4 contains a presentation of the findings of this qualitative phenomenological study. As presented in Chapter 3, Colaizzi's (1978) seven-step method of rigorous phenomenological analysis was used to derive meaning and emergent themes from the rich first-person descriptions of lived experiences gathered during face-to-face interviews with senior OFSE leaders (Morrow et al., 2015). This study is significant in that it yielded new data and findings regarding senior OFSE leaders' experiences and perspectives associated with leading employee engagement during a severe and protracted economic downturn. This study's results may be useful to organizational leaders who experience similar adverse economic environments.

This chapter includes the results of the pilot study, the study design, and the participants' demographics and background information. The emergent core themes and subthemes, which reflect the experiences and insights provided by the senior OFSE leaders relative to noncontextual and contextual employee engagement leadership, are presented. Within the body of this chapter, participants' responses to the interview questions are included to supplement the themes. The frequency of supporting or referential data for each theme is provided.

Pilot Study

The pilot study gave me the opportunity to practice and develop two crucial skills: epoche, or bracketing, and reduction. Van Manen (2014) posited that phenomenology requires both bracketing (the ability to bracket presuppositions) and reduction (the "attitude of reflective attentiveness to human existence, to what it is that makes life intelligible and meaningful to us") (p. 52). These research competencies are necessary to ensure that the researcher is open to data that may not align with his or her presuppositions and to consider reflexive questions such as "what I did, how I did it, and why I did it" (Tuval-Mashiach, 2017, p. 130). As posited by Doody and Doody (2015), a well-conducted pilot study can result in "methodological rigor, higher quality research, and scientifically valid work that is publishable" (p. 1074).

Self-knowledge: Interview the interviewer. Before conducting the pilot and the primary study, I sought to understand my presuppositions regarding the research subject to encourage openness during the data collection and analysis processes. As proposed by Chenail (2011), a professional peer interviewed me prior to the pilot study, and the qualitative data collected during the interview were analyzed to systematically uncover my biases related to the study. The interviewer's qualifications included (a) being a well-respected peer, (b) having more than 15 years of industry and leadership experience, (c) having a graduate degree, and (d) being familiar

with the research purpose and aims. Moreover, the interviewer had research and interviewing experience, which facilitated the interview.

The analysis of the qualitative data gathered during the interview revealed seven presuppositions regarding the influence of retrenchment business strategies on leading employee engagement. Table 6 contains my presuppositions. Having insight into these presuppositions was essential to successfully bracket these biases. Furthermore, the process of being interviewed enabled me to empathize with and to be sensitive to the study participants during the data collection process.

Table 6

Researcher's Employee Engagement Presuppositions

Presuppositions
1. Leaders focused on assessing the emerging economic contraction and developing adaptive strategies.
2. Leaders used two-way communication to inform the organization about the industry recession and the firm's financial position and to gather information and feedback.
3. Leaders used two-way communication to keep surviving employees engaged in improving organizational performance.
4. Leaders spent more time in front of employees as a means to counter the ongoing bad news that was prevalent during the industry contraction.
5. Employees' level of disengagement increased during the industry contraction due to uncertainty and higher levels of job insecurity.
6. Employees who bought into the retrenchment business strategies remained engaged.
7. Employees' anxiety increased during the industry contraction.

Discoveries. Through the pilot study, I addressed three significant concerns. First, phenomenological inquiry calls for exploring the lived experiences of the participants within a specific context. This qualitative research methodology calls for researchers “to have a phenomenologically reflective attitude and to wonder about the lived meaning of phenomena and events” (van Manen, 2014, p. 32). Planning for and executing a pilot study enabled me to collect

and analyze data prior to the primary research study to determine if personal biases or reflective capabilities adversely affected the phenomenological research process and the scientific rigor.

The pilot study gave me the opportunity to be reflexive, which is to critically self-reflect on the impact I have on the research (Tuval-Mashiach, 2017). Reflexivity enabled me to assess the research processes in order to validate the planned methods and the research findings. Given the range of responses provided by the participants during the pilot study, it became evident that my openness to the data facilitated bracketing and reduction during the collection and analysis of the data.

Secondly, the pilot study allowed me to practice the administrative steps associated with a study that involves human participants. I emailed the participant solicitation material approved by ACU's IRB to two senior OFSE leaders, and they responded positively to the request to participate in the research study. (The participant solicitation form appears in Appendix D.) After the senior OFSE leaders had verbally volunteered to participate in the research, I emailed study-specific background information, including interview questions (presented in Appendix E) to the participants so they would have access to the research and interview questions and have time to prepare in advance of the interview. Before conducting the interviews, I explained the informed consent to participants, and participants reviewed and signed the consent form. (The informed consent form is found in Appendix F.) The participants understood the study purpose and potential benefits, their risks as participants, and the mechanisms in place to protect their confidentiality. The participant solicitation, interview scheduling, and consent form process worked as planned. The interviews were conducted as scheduled. These critical processes were successfully duplicated in the primary study.

Although limited in scope, the pilot study suggested that my participant solicitation and consent forms were adequate and appropriate for this study. The participants' feedback

regarding these forms was positive. Participant PI002 shared that the solicitation form helped him better understand the study's topic and context. Both pilot study participants considered the risks of participation to be negligible, and they willingly signed the consent form before the interview. Based on the pilot study results, I did not modify these processes before beginning the primary research study.

Lastly, the pilot study allowed for data collection and analysis before I embarked on the primary research study. A pilot study may lead researchers to modify or refine the research questions to solicit meaningful, study-specific data (Wray et al., 2016). Based on the interviewees' responses and the findings of this abbreviated study, I found that the interview questions did not need to be modified. However, I was sensitive to the participants' responses during data collection and was prepared to make changes if needed.

During the pilot study, it became evident that follow-up questions stimulated the participants to share more profound insights into their lived experience. As posited by Turner (2010), researchers need to be able to use follow-up questions to obtain the best possible participant responses. Follow-up questions or prompts were used in both interviews to redirect and focus interviewee responses and to encourage participants to delve deeper into their experiences. For example, I found that asking participants to share specific examples of their viewpoints helped them to think more deeply about their responses and to provide more substantive responses. At times, the participants' answers to follow-up questions were slower and more deliberate, which suggested that they were thinking more deeply and that they were going beyond their internal script.

The pilot study participants' behaviors and body language as they answered questions were revealing. In the pilot study, I observed that the participants' behaviors and verbal responses concerning their firm's economic outlook, poor financial performance, and execution

of business strategies conveyed the stress they experienced during the 2014–16 industry recession. It was clear from their behaviors during the interviews that out of all the retrenchment business strategies, reducing head count was the most difficult, though the level of emotion they displayed varied.

The pilot study allowed me to test the transcription process and the mechanisms meant to protect participants' confidentiality. I transcribed the interviews and linked them to nondescriptive alphanumeric codes and pseudonyms. Participant identification information was stored on a password-protected computer, and all physical forms were secured in a lockbox. The transcription of the participants' recorded interviews and the process used to protect their confidentiality worked as designed. These processes remained consistent during the main study.

Primary Study

The main research included conducting semistructured interviews with 10 participants, senior leaders at OFSE firms who had substantial financial responsibilities within their firm and who were responsible for a workforce of at least 250 people (see Table 4 for a sample participant profile). The interviews were conducted in Houston. The study participants readily shared their perspectives, stories, and lived experiences. Additionally, the participants responded promptly when asked to validate or edit their interview transcripts (member checking) and when asked for their feedback regarding the emergent core themes and subthemes. The core themes and subthemes presented in this chapter were developed through the execution of Colaizzi's (1978) phenomenological data analysis process.

Research design. The design of this research included a research question and pertinent interview questions that elicited senior leaders' insights, stories, and perspectives relative to their general engagement leadership experiences and, specifically, their engagement leadership experiences while implementing retrenchment business strategies to adapt their organizations to

a severe and protracted economic downturn. A total of 10 senior business leaders participated in the primary study. The qualitative data were collected during semistructured interviews with the participants. I recorded the participants' interviews using two portable digital recorders. The use of a redundant digital recorder increased the probability that there would be no issues recording the participants' interviews. My field notes were used to capture participants' body language, points of emphasis, and other observations.

The voice recordings of the participants' interviews were transcribed using the audio-to-text transcription software Temi. Although this transcription software package was useful, it did not accurately transcribe the audio recordings of participants' interviews. Therefore, I listened to each interview recording and made corrections to the transcriptions to ensure data reliability. After correcting the transcriptions, I saved the data to a Microsoft Word document.

The qualitative inquiry enabled me to engage with senior OFSE leaders and to explore their lived experiences and perspectives relative to their engagement of employees during a severe and protracted industry recession. The participants readily shared their insights, attitudes, and lived experiences regarding engagement leadership and the impact of an economic downturn on their ability to engage employees. Purposeful participant selection generated rich and coherent descriptions that supported the aim of this study. As previously described in the pilot study section of this chapter, the research design and inquiry processes strictly adhered to ACU's IRB research standards and guidance.

Given the study's purpose and design, the participants' answers to interview questions produced data that were either general in nature (noncontextual) or specific to the research question (contextual). Therefore, I classified the core themes and subthemes as either noncontextual or contextual. While it may be argued that the senior OFSE leaders' responses to the interview questions were contextual, the participants' responses were grounded either in their

lived experiences during the 2014–16 severe and protracted industry recession or in their lived experiences outside this economic event. The themes that emerged from the participants' responses based on their lived experiences in the 2014–16 economic contraction were classified as contextual themes. Likewise, any themes that emerged from the participants' responses that were not grounded in the 2014–16 economic downturn were classified as noncontextual. The segregation of these findings enabled me to compare and contrast the results and to further develop insights into the interaction of senior leaders' implementation of retrenchment business strategies during a significant economic downturn and their ability to engage their employees.

Description of study participants. The professional criteria for inclusion in this study were explained to each of the study candidates (see Table 4), and each senior leader who participated in this study met these requirements. The demographics of the primary study participants are shown in Table 7, and the participants' professional and educational information is included in Table 8.

As evident in the demographic data, the sample was largely homogeneous. The participants were all male. The sample consisted of 8 baby boomers and 2 Generation Xers. One participant was African American, and 9 participants were Caucasian. All but 1 participant had earned an undergraduate degree, and 3 participants had earned a graduate degree. Four of the participants were either a chief executive officer or a chief operations officer. Two of the participants held the title of president, and 4 were vice presidents.

Data analysis. This study included a purposive sample, which consisted of 10 senior leaders (e.g., chief executive officers, chief operating officers, presidents, and vice presidents) who were financially responsible for their organization during the 2014–16 OFSE severe and protracted industry recession. Upon collection of the qualitative data via person-to-person interviews, I immersed myself in the qualitative data by reading each transcript three times.

Table 7

Gender, Generational, and Ethnic Demographics of Participants

Demographics	Frequency (<i>N</i>)	Percentage (%)
Gender		
Female	0	0.0
Male	10	100.0
Generation/age		
Millennials (18–34 years old)	0	0.0
Generation X (35–49 years old)	2	20.0
Baby boomers (50–68 years old)	8	80.0
Ethnicity		
African American	1	10.0
Asian / Pacific Islander	0	0.0
Caucasian	9	90.0
Hispanic / Latino	0	0.0
Native American / American Indian	0	0.0

Note. $n = 10$.

Table 8

Educational and Professional Demographics of Participants

Demographics	Frequency (<i>N</i>)	Percentage (%)
Organizational role		
C-suite executive	4	40.0
President	2	20.0
Vice president	4	40.0
Other	0	0.0
Education		
High school diploma	1	10.0
Bachelor's degree	6	60.0
Master's degree	3	30.0
Doctoral degree	0	0.0

Note. $n = 10$.

After transcribing the interviews, I sent each of the study participants a copy of his interview transcript. I asked the participants to review the transcript for accuracy and to verify the data they provided. The participants responded via email and either validated the accuracy of the data they provided or asked to discuss their information. Out of the 10 participants, 2 requested that their postinterview data be changed. I made the changes as requested.

Coding method and thematic analysis. The research data consisted of the 10 participants' responses to the four interview questions. I imported the interview transcripts to Dedoose 8.1.8, the software used to conduct the data analysis. I used Dedoose and Microsoft Excel to search for significant statements, concepts, patterns, and trends. The significant statements, based on the participants' lived experiences, included the participants' relevant perspectives, insights, and stories.

I analyzed the data for significant statements and highlighted them using Dedoose. The software enabled me to assign conceptual codes to each of the significant interview excerpts. Colaizzi (1978) posited that researchers should develop meanings from the significant statements. I used the formulation of concept codes to give meaning to the significant statements. Next, I analyzed the data for pattern codes, which led to the identification of themes.

Following Colaizzi's (1978) phenomenological data analysis process, the analysis included integration of the findings and development of the description and fundamental structure of the phenomenon. The emergence of core themes and subthemes from the data analysis created a comprehensive explanation of the study phenomenon. The development and presentation of both the contextual and noncontextual core themes and subthemes illuminated the description of the phenomenon.

Lastly, Colaizzi's (1978) qualitative data analysis process called for the researcher to submit the study findings to the participants to validate the results. All participants confirmed

that they concurred with the core themes and subthemes presented in this chapter. While van Manen (2014) posited that data saturation is not relevant to phenomenological research because the aim is to find meaning in the lived experience of the participants, other researchers have suggested that gathering extensive data enhances the trustworthiness and validity of the qualitative data (Fusch & Ness, 2015). The data analysis indicated that no significant novel information was collected after the seventh interview; therefore, data saturation was achieved (Creswell, 2014).

The core themes and subthemes emerged during the analysis of the participants' transcribed responses. They are presented in descending order based on the frequency with which they appeared in relevant and supportive excerpts from the participant interviews. Table 9 contains a list of the noncontextual themes and subthemes and the response frequency for each. Likewise, Table 10 contains a list of the contextual themes and subthemes and the total response frequency for each. The tables capture the cumulative number of significant statements from which the core themes and subthemes emerged.

Some of the participants' responses included several significant statements that revealed the importance of a specific theme or subtheme, whereas other participants' responses may not have presented a significant statement related to a specific theme or subtheme. Because the participants were senior leaders, their responses included a large number of significant statements and presented information-rich data. Therefore, the cumulative number of significant statements that supported the development of the core themes or subthemes varied.

The frequency with which each theme and subtheme appeared may indicate the significance of each core theme and subtheme. A matrix that lists the core themes and subthemes and each participant's contribution to the themes may be found in Table 11. The participants' contributions to the core themes and subthemes indicate a commonality of lived

Table 9

Summary of the Emergent Noncontextual Core Themes and Subthemes

Themes and subthemes	No. of participant responses (<i>n</i>)	Percentage of theme total
Theme 1: Practice engagement leadership		
Subtheme A: Encourage leader-employee dialogue: Give employees a voice	24	30%
Subtheme B: Develop leader-employee relationships	16	20%
Subtheme C: Seek to learn and leverage drivers of employee engagement	14	17%
Subtheme D: Carefully assess employee engagement	14	17%
Subtheme E: Emphasize the significance of employees to organizational performance	13	16%
Total	81	100%
Theme 2: Provide job resources and leadership support		
Subtheme A: Empower and support employees	16	47%
Subtheme B: Invest in employee development	9	26%
Subtheme C: Ensure employee job fit	9	26%
Total	34	100%
Theme 3: Establish leadership credibility		
Subtheme A: Lead ethically and earn trust	17	71%
Subtheme B: Hold employees responsible and accountable for their performance	7	19%
Total	24	100%
Theme 4: Develop and communicate a unifying mission and goals	27	100%
Theme 5: Organizational benefits of employee engagement		
Subtheme A: Performance focus	17	40%
Subtheme B: Enhanced organizational reputation	9	21%
Subtheme C: Innovation and process improvement	8	19%
Subtheme D: Improved profitability	8	19%
Total	42	100%
Total responses	208	

Table 10

Summary of the Emergent Contextual Core Themes and Subthemes

Themes and subthemes	No. of participant responses (<i>n</i>)	Percentage of theme total
Theme 1: Practice engagement leadership		
Subtheme A: Encourage employee participation	23	28%
Subtheme B: Keep employees informed	18	22%
Subtheme C: Develop leader-employee relationships	17	20%
Subtheme D: Emphasize the significance of employees to organizational performance	13	16%
Subtheme E: Communicate the logic of retrenchment business strategies	12	14%
Total	83	100%
Theme 2: Address short-term business imperatives		
Subtheme A: Gain situational awareness	41	50%
Subtheme B: Focus on short-term financial profitability	29	35%
Subtheme C: Sense of urgency: Establish organizational priorities	12	15%
Total	82	100%
Theme 3: Establish leadership credibility		
Subtheme A: Engage in thoughtful and trustworthy communication	34	43%
Subtheme B: Demonstrate leadership competencies	31	39%
Subtheme C: Preserve organizational talent	14	18%
Total	79	100%
Theme 4: Nonproductive nature of employee disengagement		
Subtheme A: Concerns and distractions lower engagement	21	38%
Subtheme B: Lower levels of employee morale and engagement	14	25%
Subtheme C: Unproductive interpersonal interactions	10	18%
Subtheme D: Uncertainty and fear lead to inaction	10	18%
Total	55	100%
Total responses	299	

experiences and perspectives relative to leading engagement during a significant economic recession.

Noncontextual Core Themes and Subthemes

The following core themes and subthemes were developed from the participants' responses to Interview Question 1: What are your professional experiences regarding leading employee engagement? This interview question was designed to elicit senior leaders' lived experiences and perspectives regarding engagement leadership without regard for the economic environment.

Noncontextual Core Theme 1: Practice engagement leadership. All of the study's participants indicated that they intentionally interacted with employees as a means of motivating employees to engage at work. Five subthemes emerged from the qualitative data, and these subthemes revealed participants' experiences and perspectives regarding the significance of their efforts to engage employees. The overarching theme, engagement leadership, included five subthemes: (a) encourage leader-employee dialogue: give employees a voice, (b) develop leader-employee relationships, (c) seek to learn and leverage drivers of employee engagement, (d) carefully assess employee engagement, and (e) emphasize the significance of employees to organizational performance.

Encourage leader-employee dialogue: Give employees a voice. The senior leaders emphasized the interaction between the leader-employee dialogue and employees' level of engagement. All of the study participants shared experienced-based insights regarding initiating and encouraging leader-employee dialogue and giving employees a voice as a means of motivating employees to engage at work.

Table 11

Participants' Contribution to the Study's Emergent Themes and Subthemes

Themes and subthemes	Alex	Bob	Charles	David	Ed	Frank	George	Harvey	Ira	John
Noncontextual										
Theme 1: Practice engagement leadership										
Subtheme A: Encourage leader-employee dialogue: Give employees a voice	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Subtheme B: Develop leader-employee relationships	Y	Y	Y		Y	Y	Y	Y		Y
Subtheme C: Seek to learn and leverage drivers of employee engagement	Y		Y	Y	Y	Y	Y		Y	Y
Subtheme D: Carefully assess employee engagement		Y	Y	Y	Y	Y	Y		Y	
Subtheme E: Emphasize the significance of employees to organizational performance	Y	Y	Y	Y	Y			Y	Y	Y
Theme 2: Provide job resources and leadership support										
Subtheme A: Empower and support employees	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Subtheme B: Invest in employee development		Y	Y	Y	Y			Y	Y	Y
Subtheme C: Ensure employee job fit	Y		Y	Y	Y		Y	Y	Y	Y
Theme 3: Establish leadership credibility										
Subtheme A: Lead ethically and earn trust	Y	Y	Y	Y	Y	Y	Y	Y		Y
Subtheme B: Hold employees responsible and accountable for their performance		Y	Y	Y		Y	Y			Y
Theme 4: Develop and communicate a unifying mission and goals	Y	Y	Y	Y	Y	Y		Y	Y	Y
Theme 5: Organizational benefits of employee engagement										
Subtheme A: Performance focus	Y	Y	Y	Y	Y		Y	Y		Y
Subtheme B: Enhanced organizational reputation	Y		Y			Y			Y	Y
Subtheme C: Innovation and process improvement			Y	Y	Y		Y	Y	Y	Y
Subtheme D: Improved profitability		Y		Y	Y	Y	Y	Y		Y
Contextual (severe and prolonged economic downturn)										
Theme 1: Practice engagement leadership										
Subtheme A: Encourage employee participation	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Subtheme B: Keep employees informed	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Subtheme C: Develop leader-employee relationships	Y	Y	Y	Y	Y	Y	Y	Y		Y
Subtheme D: Emphasize the significance of employees to organizational performance	Y	Y	Y		Y	Y	Y		Y	Y
Subtheme E: Communicate the logic of retrenchment business strategies	Y	Y	Y	Y	Y	Y			Y	Y

(table continues)

Themes and subthemes	Alex	Bob	Charles	David	Ed	Frank	George	Harvey	Ira	John
Theme 2: Address short-term business imperatives										
Subtheme A: Gain situational awareness	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Subtheme B: Focus on short-term financial profitability	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Subtheme C: Sense of urgency: Establish organizational priorities		Y		Y	Y	Y	Y			Y
Theme 3: Establish leadership credibility										
Subtheme A: Engage in thoughtful and trustworthy communication	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Subtheme B: Demonstrate leadership competencies	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Subtheme C: Preserve organizational talent		Y		Y	Y	Y		Y	Y	
Theme 4: Nonproductive nature of employee disengagement										
Subtheme A: Concerns and distractions lower engagement	Y	Y		Y		Y	Y	Y	Y	
Subtheme B: Lower levels of employee morale and engagement	Y	Y		Y		Y	Y	Y	Y	Y
Subtheme C: Unproductive interpersonal interactions	Y	Y	Y		Y	Y			Y	Y
Subtheme D: Uncertainty and fear lead to inaction	Y		Y	Y	Y		Y			Y

The senior leaders' collective insights revealed the positive effect of establishing leader-employee dialogue on employee engagement. Harvey succinctly stated, "I've always found that employee engagement is all about senior management's openness." Frank expressed what employee-leader dialogue and employee voice meant to him by describing his outreach to the frontline employees:

I'm cognizant that the lowest-level guys in the field [frontline employees] generally have negative ideas about the people in the corporate office and since I am from Houston [the corporate office], they don't necessarily know me. So, I traveled to the frontline employees and talked with them about whatever it is that I think we needed to talk about, but at the same time I asked them for their feedback on that particular topic. After getting out my message, I asked them, "Now that we're together, you tell me anything that you want to talk about." I wanted to have an open dialogue and tried to create the situation where the field [frontline] employees felt comfortable talking to me.

Likewise, the leaders found that giving frontline managers and employees a voice facilitated their engagement. Alex described his experience in the following way:

It's hearing the story or the narrative of the managers, but I think it's important that you go out and hear from managers and the troops, so to speak, because there's a lot of useful information to be gained from the guys on the frontline.

The senior leaders also recognized the importance of employees' perspectives regarding leaders' openness to seeking employees' opinions and ideas. George reflected on his experience and shared the following:

If the employee doesn't feel like they have a voice, doesn't feel like they're being asked to participate in the ongoing operations of the company, or maybe have the impression that the company's operating culture doesn't encourage them to share their ideas, they can disengage. Job limitations or limited opportunities to contribute, as opposed to a company where there's an openness about the company in terms of its culture and openness about communicating and openness about new and better ideas—these things impact employees [engagement].

Similarly, the leaders stated that listening to employees and including employees in problem-solving was crucial to understanding the barriers to organizational change and developing workable solutions. David recalled,

We can come in and enforce our opinions and our views on how the business could be run. But I think where we got the tide turned was we really spent a lot of time talking to the employees. It was difficult, but we teased out all of their perspective on what needed to be fixed and why. And generally, they knew what to do.

Develop leader-employee relationships. Senior leaders highlighted the significance of establishing and maintaining relationships with their employees. Leaders stressed the value of meeting and communicating with frontline supervisors and employees as a means of establishing rapport and earning trust. For example, Alex shared his perspective regarding his interactions with employees and employees' willingness to engage:

So it's always been very important for me to meet with my troops [frontline employees]. Regardless of what's going on in the market, it just seems like the closer and more open that relationship is, the more employees tend to be engaged.

The senior leaders found that intentional and thoughtful interactions with frontline employees could lead to higher levels of employee trust and engagement. Frank linked

developing leader-employee relationships to employees having positive attitudes toward their leader:

I think that it's important that at my senior level that I interact with guys who are several levels down and try to establish rapport, where hopefully they know something about me and have some level of trust in me.

The senior leaders related purposefully socializing with employees to facilitate two-way communication, engagement, and teamwork. While business leaders have many responsibilities, the leaders were committed to investing their time in forming relationships with their employees.

Bob engaged in socializing to enhance employee engagement:

I thought it was important to take my team out of the office to where we could build relationships; learn about each other's families, interests; and to create common experiences. I thought the time spent together outside the office enhanced team building and engagement.

When asked to describe his employee relationship building experience, Harvey demonstrated his sincere commitment to establishing relationships with his employees:

Cultivating an atmosphere of openness, talking at the coffeepot in the morning. So, I always take the opportunity to ask what's going on. Nonwork topics, getting into those conversations I think fosters good relationships. A lot of it is just about [my] time spent with people [employees]. That's one of my experiences with trying to cultivate an atmosphere of engagement.

Seek to learn and leverage drivers of employee engagement. The senior leaders suggested that they could positively influence their employees' engagement, but first they needed to understand what motivated each employee to engage at work. Alex concisely stated, "I needed to understand the things that lead my employees to be motivated or engaged." Ed saw it as his responsibility to assess employees and to understand what motivates employees to engage:

For me, employee engagement is basically learning each individual, what their strengths are and what their weaknesses are, trying to understand what drives them, what motivates them. For some people it is money, and for some people it is other things such as opportunities to advance. I dial into their interest, the things that they're interested in.

Similar to their concerns about assessing employee engagement, the leaders contended that identifying drivers of employee engagement was difficult. Ira stressed the need to invest time in learning what motivates each employee to engage at work:

Engaging people can be a challenge because it's different for everybody. I think, you know, there's different levers that can be pulled to engage different people. So, I think trying to identify those things that engage people—as a leader, if you don't have some rapport with your employees to try and learn what those drivers are, what those levers are for engagement, then you could miss the mark [motivate disengagement] because it's not the same for everybody.

George asserted that leaders and employees need to understand each other's expectations as part of the employee engagement process:

I think that the problem is oftentimes we engage employees too early on without understanding what potentially the expectation is from the employee. So, if I'm not careful, they come out confused and potentially disengage. When you see an employee not engaged, I try to figure out what levers will engage him. I look for triggers to get them engaged or try to figure out if they're not engaged. You're really trying to go through a process of confirming that [level of engagement].

Additionally, senior leaders indicated that they sought to leverage these drivers of engagement to benefit both the organization and the employee. George explained, "I build a case for how employee engagement would benefit the employees and the company."

Carefully assess employee engagement. Many of the senior leaders emphasized the challenge of understanding employees' level of engagement and stressed that an employee's personality could skew the leader's perspective regarding his or her level of engagement. The senior leaders disclosed that their engagement biases could influence their assessment of employees' engagement; however, they sought to develop a true understanding of employees' level of engagement. Charles stated,

I think engaged employees look differently, and you have to be real careful. I look at an employee's engagement and assess engagement through my lens, what I think it looks like to me. Oftentimes I think engaged employees look differently than you think they should, and it's really important that you learn to drill down and build relationships with people to really understand if they are engaged.

George maintained that employees' personality could influence how they express their engagement. George illustrated this leadership challenge as he shared his professional experience:

Based on my experience, one of the critical pieces is if they don't seem as engaged as you like them to be, don't immediately see that as a problem. Try to figure out essentially what their personality is. So, they may be very engaged, but their personality may be such that they're an introvert, and so they're not going to readily just throw around, "I have a fantastic idea" or "What do you think about this?" So, I have had to be careful and take the time to understand their personality and style and account for these in my assessment of their engagement.

Similarly, Ira emphasized the effect personality can have on employees' behaviors irrespective of their level of engagement. Ira concluded, "Some people want to have, you know, more of a silent impact to make sure that things are done a certain way, and they don't want the spotlight. Other people want to be seen."

Emphasize the significance of employees to organizational performance. Many of the senior leaders felt that it was essential to emphasize the significance of employees. Ed said, "I have found that employees who feel appreciated are more engaged and productive." Charles linked employees' perspective regarding their value to the team to their engagement and productivity:

I think praise and recognition goes a long way with engagement. People really like to feel like an important contributor. There are many ways to praise and recognize people. One is financial—you know, everybody gets a bonus—and all that is meaningful. But real authentic praise, where a guy says, "This company, this person, this team I'm on really depends on me, really values me" means more.

Likewise, some of the leaders indicated the importance of ensuring that employees know that they are valued. Ira stressed, "Part of the [organizational] culture that we want is that people [employees] feel like their opinions and decisions do matter and they don't just become another employee or a number." Moreover, the senior leaders sought to help employees recognize their impact on their firm's performance. For example, Alex commented, "An employee engagement

method I used was transparency. My transparent communication helped the guys see the net effect of what they were doing and how important it was for our business unit.”

Noncontextual Core Theme 2: Provide job resources and leadership support. The senior leaders indicated that leadership support and job resources could positively influence employee engagement. The subthemes, from highest to lowest frequency, were (a) empower and support employees, (b) invest in employee development, and (c) ensure employee job fit.

Empower and support employees. The senior leaders shared their views regarding the interaction between employee empowerment and engagement. Frank stated, “It is hard to think that you could have engagement without empowerment.” David also reflected on an experience that highlights the significance of empowerment:

So, you guys get a chance to be involved [engaged] and help shape how that world [new organization] looks. We really spent a significant amount of time with a very large team of management and middle management to make sure we were shaping it the right way from branding to everything.

The senior leaders maintained that empowering employees to make decisions and supporting their choices encouraged employees to engage at work. Ira shared,

I give employees the ability to make decisions, to get engaged, and occasionally the ability to make the wrong decision. If it’s something drastic where the company is going to lose a large amount of money, or there’s a safety concern, I intervene. I also think people are more creative, more engaged, when they feel like that everything they’re going to do isn’t going to necessarily end up with somebody punishing them for doing something that’s not exactly the way I wanted it done.

Coming from a different point of view, George contended that leadership support in the form of leader-to-employee feedback is fundamental to employee engagement. George stated,

Leaders need to be clear about what the objectives are in the process and provide ultimately continuous feedback, because once they feel like, you know, “I’ve provided some input, but I’m not getting any feedback,” then I think you create a something that potentially is not productive and disengaging. People just feel like, “I’m voicing my opinion, but nothing’s being done.” So, that feedback loop is critical, and even if you decided not to adopt it—if you just say, “That’s not a good idea, at least for this solution” or, you know, “Let’s look at that another time”—there’s some sort of feedback. So, they

understand their efforts, whatever they said, it's been heard, it's been evaluated, and here's the result.

In contrast, Ed recognized that some employees are not ready for empowerment and that empowerment in this situation may be nonproductive or disengaging. Ed asserted,

Some managers need to do a bit more of micromanagement of their employees. Some of it may be necessary because the people that they have in their frontline roles may not be 100% competent, so they need some extra guidance.

Invest in employee development. The senior leaders suggested that it was their responsibility to develop their employees and that this investment in employees could motivate employees to engage at work. Bob shared an example of a leader getting directly involved in encouraging and enabling employees to engage in professional development. Bob reflected,

I encouraged the frontline employees to come into the office. I created workstations and work areas that encouraged the guys to come in and engage in professional development training. My teams told me they appreciated that I was genuinely interested in their development and promotion and that no one else had done this for them.

Senior leaders emphasized professional development through informal and on-the-job training to enhance employees' skills and knowledge. Ed felt that exposing employees to other functional roles would strengthen their leadership ability. Ed described his efforts toward employee development:

I also worked to task people with going out into the field—you know, people that had come into the company and might have strong administrative skills, strong financial skills, supply chain skills. To help them develop, I tasked them with going out into the field and learning more about the jobs that our frontline employees deal with every day. This gave them a better understanding of our business and helped to round out their experiences in other important areas of the business. I also sent employees on international assignment so that they could meet international clients, our international organization, and other support roles, so that they would be more competent leaders. I was helping them get out there and learn and gain new experiences.

The leaders also stressed the importance of formal training to improve employee engagement and performance. Charles set out to make improvements in his large sales staff and engaged them in formal training sessions. Charles shared,

For example, I put all the sales guys through negotiation school, and almost immediately we saw a big reversal in the how we handled dispute resolutions because these guys had some skills to navigate the process and could avoid getting pinned down. It cost our company a bit of money, but it was a good investment in our people. After their training, they became much better at negotiating, engaging with customers.

Ensure employee job fit. The senior leaders understood the significance of an employee's job fit. Charles stated, "So a good leader, I think, has the ability to assess individuals and get them in the right position." George reflected on his experiences and concluded,

Maybe their skill set's not the best fit for that job, or they don't find that assignment very interesting. It could be a variety of things, but in an organization I think it's critical for a leader to take the time to figure out, is it a personality issue when someone doesn't seem to be engaged, a style issue, or is it really fundamentally flawed, and they're in the wrong assignment or they have the wrong skill set?

The leaders recognized that the employees' skills and personality influenced their performance in a given job or team. The leaders also maintained that it is a leader's responsibility to ensure employees are in a role that benefits both the company and the employee. Harvey contended that as a leader he was responsible for "getting people in the right places, jobs, and getting them engaged in their jobs."

Interestingly, one participant also thought that leaders should assess employees' organizational fit. Beyond employee job fit, John suggested that leaders need to assess and help employees assess their fit with an organization. John reflected, "Maybe the organization's culture is such that it is not a good fit with the employee. If I determine this, I help the employee move on."

Noncontextual Core Theme 3: Establish leadership credibility. The core theme of establishing leadership credibility emerged through the integration of subthemes that underscored senior leaders' responsibilities to their organization. The subthemes included (a) lead ethically and earn trust and (b) hold employees responsible and accountable for their performance. The senior leaders' responses related to these subthemes emphasized the

interaction between leaders' credibility and their ability to positively influence employee engagement.

Lead ethically and earn trust. The senior leaders thought that ethical leadership was necessary to establish credibility with their workforce. This subtheme revealed that the leaders understood that not only do they evaluate their employees, employees also assess their leaders' behaviors and performance. The leaders suggested that there is a positive relationship between a leader's credibility and his or her ability to engage employees.

The senior leaders asserted that treating employees justly enhanced employees' perspectives regarding their leader's credibility. John found that "leading is largely a matter of trying to understand people and treating people fairly." Frank's insight into leadership transparency and consistency suggested that employees were more likely to engage when their leaders exhibited these attributes. Frank contended,

You really have to walk the talk, so to speak, and develop the trust and connection with your employees. I think that when I talked to the operations groups honestly and transparently, they see that. And when those things that I told them turned out to be true and that I followed up, I sensed that these meetings created . . . more confidence and trust from their side. And ultimately that serves what we're trying to do here: engage the organization.

Harvey spoke to the importance of establishing core values within an organization. He stated that it was his responsibility to lead by example so that the workforce would know the importance of consistently engaging in ethical behaviors. Harvey adamantly stated,

So, I've always been a big believer—and you know, morally and certainly lawfully there's always the right thing to do, and we don't infringe on the things that are obviously not moral, not legal—setting the tone in the company as far as those types of things, I think is important for the top guy [CEO].

Hold employees responsible and accountable for their performance. While the senior leaders' responses focused mostly on the positive aspects of encouraging employee engagement, they also voiced their insights into the need for establishing credibility through setting employee

expectations and holding employees accountable for their performance. Charles linked the value of praise and recognition to employees with the leader's ability to critically assess employee performance and to take corrective action when warranted. Charles contended,

To make praise and value recognition personally valuable, you [the leader] also have to be critical. The reciprocal of that [praise and recognition] is you've got to be critical of the bad behaviors. You can't ignore people problems. They don't fix themselves. You have to aggressively address people problems and hold people accountable.

Similarly, George found that leaders need to convey to employees that they are responsible and accountable to others in the organization:

I think leaders must make sure employees understand that they've got a responsibility and that they are accountable for engagement, that in most cases there are some exceptions, they are accountable to others and can't just operate in a silo.

David shared a story of how he established responsibilities and accountability early in his leadership tenure. He stressed the need for clarity: "We had clear accountabilities. No matrix? We're going to do this really black-and-white, really simple. No one's going to leave not understanding who's on first, who's on second."

Noncontextual Core Theme 4: Develop and communicate a unifying mission and goals. Most of the senior leaders emphasized the significance of a unifying mission and goals. The leaders confidently described the influence they exerted through the communication of their firm's mission and goals. Communication of the organization's mission and goals to frontline employees was also accomplished through intermediaries, a middle manager, or a frontline supervisor. Therefore, the leaders asserted it was crucial that they develop a clear mission and strategic plan and gain buy-in from their direct reports as a means of securing organizational support and engagement.

The senior leaders revealed that their firm's mission could positively influence employee engagement, collaboration, and performance. Charles maintained, "Within my global business unit, we [the workforce] realized the value of having a goal and having a mission and

collaborating, working together, and driving performance improvement.” The senior leaders emphasized the unifying impact that the organization’s mission had on employees. David asserted, “Our rallying cry for everybody was we were going to beat the major competitors. It was very clear what our mission was, and people [employees] rallied behind it.”

While the leaders recognized the positive effect of a compelling mission and ambitious goals on their employees’ engagement, they also recognized that engaged employees desired to understand their company’s goals and mission and to participate in achieving these objectives. Alex described his observation and perspective:

Engaged employees want to understand the direction and goals of your organization. They want to know the goals of what you’re trying to achieve, your objectives, and want to be a part of it. And it is the leaders’ job to make sure they understand and support the mission.

Additionally, the senior leaders acknowledged their limitations regarding their communication of the mission and goals to positively impact the frontline employees’ engagement. Notably, leaders also indicated that their proximity to their employees affected their ability to communicate the mission and goals, and they suggested that their influence on the engagement of frontline employees was related to their ability to engage middle managers and frontline supervisors in the communication of the mission and goals. As Harvey commented, “It’s difficult to know everybody at every location [in the organization], so you need people in place, down the line, that can engage employees and are good at that.”

The senior leaders revealed that they relied on their leadership team, middle managers, and frontline supervisors to support their organization’s mission and goals. Frank presented his perspective concerning his reliance on his leadership team:

I tried to have clarity around what the goals of the organization were and how those goals translated to the expectations that were on my direct reports. These expectations then filtered down to the guys below them. So, I worked to have consistency in my message, going back to the mission and the goals of the organization: What exactly are we trying to do?

Noncontextual Core Theme 5: Organizational benefits of employee engagement. The data collected from the senior leaders indicated that they recognized the organizational benefits of engaged employees and the benefits that accrue to teams within their organization. Under this overarching theme are subthemes that characterize specific organizational benefits. The subthemes include (a) performance focus, (b) enhanced organizational reputation, (c) innovation and process improvement, and (d) improved profitability. The subthemes are presented in descending order based on the number of times participants mentioned the theme.

Performance focus. The senior leaders revealed that they recognized and valued engaged employees, and as reported earlier in this chapter, they sought to understand what motivated employees to engage at work. The leaders referenced many employee engagement attributes that could lead to higher levels of financial performance. John's characterization of engaged employees stressed enhanced productivity and professional capacity:

If they [employees] are fully engaged, it means that their contribution is materially above that of employees that are not really engaged. They, in general, are happier. They are more productive. They require less time to manage. And they progress faster to their potential.

The senior leaders found that engaged employees were committed to their work and teams and were more responsible at work. Alex confidently shared his employee engagement description:

I would say that an engaged employee brings to the job a great dedication, a conscientiousness about doing a very good job regardless of what that task is. There's an enthusiasm about how they live their lives and as a result how they approach their jobs.

Charles further developed the description of employee engagement by proposing that "engagement is giving every ounce of your effort, knowing where you're going, what you're aiming at, and you're doing everything you can to get there personally and professionally."

The leaders saw in engaged employees organizational members who wanted to perform at a high level. Ed's description of an engaged employee revealed a professional who both

produced outstanding work in the present and looked to improve performance in the future. Ed stated,

I would describe a person that's engaged is one that is self-motivated, one that understands or, if he doesn't understand, clearly comes back to you with positive and constructive questions. When people are engaged in what they do, they learn quickly, and they are always looking to contribute and to produce good work. I'd say in general somebody that's engaged would be a person that is always pushing to do things in the right amount of time and does good work. When they finish a task, it's well done. They are looking to move forward based on their work. They are constantly looking to improve themselves, looking to push themselves. Their focus on work is at a higher level than others.

Ed also reflected on a team of engaged employees and how their engagement influenced teamwork and team results:

I think that there's a lot of synergies that happen in an engaged team that you really don't always see. They start directing themselves, and they learn the strengths of each other. They know each other, what their strengths are, and they understand where each team member is. They understand what they bring to the table in the team. So, at the end of the day, it's a cohesive group that is very efficient, and that produces very good work.

Enhanced organizational reputation. Many of the senior leaders recognized how employee engagement interacted with their firm's reputation. These senior leaders had experiences that led them to think that engaged employees could positively influence their firms' standing within the industry.

John found positive consequences associated with higher levels of employee engagement:

If you develop an organization where people are engaged and motivated, then it's easier to recruit people as well. Because you have people who are willing to give very positive references for your company and for your particular group, your division, your operations—and if you look at it on a large scale, without a doubt, that will enhance the reputation of the whole organization.

Ira also mentioned an essential aspect of the reputational advantages associated with engaged employees:

Another benefit of engaged employees—they enhance the perception of the organization to third parties. So, whether that's vendors, clients, the public—when you have people that are engaged, they're asking intelligent questions to our vendors, they're representing

us well. Engaged employees, they just typically are going to draw positive attention to the company.

Innovativeness and process improvement. The senior leaders aspired to higher levels of execution and developing and deploying new technologies to differentiate their services and products. The leaders indicated that there was a positive relationship between employee engagement and performance improvement and innovativeness. George got to the heart of this relationship: “With engagement, I think you get the best of the best ideas.” In the context of enhanced innovativeness, John maintained, “The organization comes up with far more innovative ideas. So, you have a much more innovative organization that will come up with good solutions to problems that arise. You have an organization that’s very flexible.”

With an eye on improving operational execution, Harvey described employee engagement attributes in the following way:

I think it’s somebody that’s always looking out for a way to get something done better, and it can be anything. They see inefficiencies within the business that could be safety oriented or just process oriented. They’re always kind of keeping an eye out for ways to do things better.

Likewise, Ira shared a lived experience that illustrated the advantages organizations experience when employees engage in improving processes and organizational efficiency:

She [the procurement management] was very blunt that our procurement systems and processes were really bad; this is not the way to run a company. And at first you’re like, you know, “We’re not that bad. It’s not the most efficient process.” But she was very specific and started listing off points: “Well, no, this can be done better. This amount of time is being wasted here. We’re not getting this out to the vendors on time. This [process] is inefficient.” You know, “These forms are not getting properly reviewed and signed off. We’re paying things before we’re getting approval to purchase.” Many steps in the purchasing process were out of order. You know, there wasn’t really anybody responsible for it, but we’d all kind of grown up in it. And you get somebody brought into the organization who felt compelled to say something. Once she did, you know she is right, and she can help us get to where we need to be.

Improved financial profitability. As business leaders, most of the participants credited employee engagement with higher levels of financial profitability. The senior leaders suggested

that higher levels of financial profitability are a secondary outcome, and they described their perspectives concerning how employee engagement positively influenced their firm's financial profitability. For example, Frank concluded,

I believe that the actual quality of the service that you deliver [to clients] is enhanced and that will translate, generally speaking, to some level of higher profitability either because you're picking up additional work, because your group . . . is showing customers that they do really good work or in some cases you may even be able to get a pricing premium over the norm.

According to John, "Obviously, there's the material results for the company, which in general goes up. They get more [work] done, so you can generate more income or profit. And you have better retention of employees." Similarly, Frank maintained, "I have found that the [financial] benefits are ultimately that you have a more stable workforce. You don't have high employee turnover. The cost, associated with employee turnover is reduced."

Contextual Core Themes and Subthemes

The following core themes and subthemes were developed from the participants' responses to Interview Questions 2 through 4. These interview questions (see Appendix E) were designed to elicit senior leaders' lived experiences and perspectives regarding the interaction between their engagement leadership and the retrenchment business strategies they developed and implemented during the 2014–16 OFSE economic downturn. The core themes and subthemes emerged during the analysis of the participants' transcribed responses to the interview questions and are presented in descending order based on the frequency with which they appeared in relevant and supportive excerpts from the participant interviews. Table 10 contains the contextual core themes and subthemes developed from the qualitative data.

Contextual Core Theme 1: Practice engagement leadership. The senior leaders' responses to the interview questions suggested that they purposefully interacted with employees during the 2014–16 OFSE industry recession to motivate employees toward higher levels of

engagement at work. While each participant responded based on his assessment of his organization's situation, the senior leaders emphasized the consequences of their actions relative to the engagement of employees. Five subthemes illuminating the core theme, engagement leadership, emerged from the data. The subthemes include (a) encourage employee participation, (b) keep employees informed, (c) develop leader-employee relationships, (d) emphasize the significance of employees to organizational performance, and (e) communicate the logic behind retrenchment business strategies. Although the analysis of the data revealed that this core theme, engagement leadership, was a common theme regardless of economic context, the subthemes under engagement leadership varied based on the context. The subthemes are presented in descending order based on the frequency with which they appeared in relevant and supportive excerpts from the participant interviews.

Encourage employee participation. All of the senior leaders stressed that they worked to get their employees engaged in adapting their organization to the adverse economic environment. Alex's lived experience suggested that he got his employees involved early on in the quest to adjust to the economic downturn. Alex stated,

When you start to see the market change, and you see this is really going to be something significant—a downturn—all of a sudden to me, the overcommunication just kicked in. I clearly understand what I'm seeing right now. I cannot get to my managers and my frontline [employees] quick enough to share with them my concerns and what I'm seeing and then to get their take on it as well. And again, involving them, engaging them, making them feel a big part of this, and not to scare them but to present it in such a way that they feel part of what's coming and that they have a real say, a real influence over changing the direction.

While the senior leaders had strong opinions concerning what actions to take during an economic downturn, they readily accepted that there was merit in the views and input of others. The senior leaders imparted a sense that they not only wanted their employees' input but also needed it. Ed asserted,

It is important to listen to what people have to say because to restructure your business and to reduce operating expenses, some people are going to have to do different things. I give them some input to the plan. For me, it was about talking to my direct reports and their teams. When you have to let people go, somebody's going to have to pick up what they were doing. So, communicating and listening to employees is important. Leaders need to get their input, buy-in. And [the leader] needs to find out if their employees think that the strategy makes sense and that they agree with the plan.

Many of the senior leaders pointed out that employees can develop meaningful solutions and that leaders should engage their employees in the crucial task of developing and implementing cost-cutting measures. For example, John stated,

The situation has got to be framed out so that the team of employees knows what they are facing, because very often, employees will come up with suggestions or solutions to things that mitigate the risk of job losses. So, you know, it can be very helpful to have people [employees] understand the circumstances they are in and ask them for solutions.

David was specific in that he purposefully engaged employees in the tasks of lowering operating costs. David stated,

I try and keep everybody engaged by asking them to bring us all of your cost-cutting ideas. You see ways that we'll never see. You see opportunities for savings. You see things that may or may not be necessary. You know, you hope people are doing that all the time anyway. But when you direct that message out, broadcast it out loud, clear—"This is going to help the guy next to you, or maybe even you keep your job either a little longer or, you know, throughout this downturn."

Keep employees informed. The senior leaders suggested that in the economic downturn, they focused on adapting their firms to remain financially viable. Moreover, the leaders consistently indicated that communication (information sharing) is most important when the organization is facing financial adversity. Ed concluded,

Leaders need to communicate more in a downturn because of the fact that things are constantly changing. People [employees] don't like change, but they all knew that things were changing because they're not living in a bubble. At the end of the day, communication by the leadership is needed to make sure that they know where we're headed.

The senior leaders strongly indicated that they sought to elevate their level of information sharing to reassure the workforce and to keep the surviving employees engaged in sustaining the organization. Frank shared,

I worked to communicate and to engage my workforce. I try to reassure them, where I can. Again, I believe in being honest with them. I think people respond very positively when I'm honest. So, as a leader I share information with them, even if I'm bringing them bad news, so they understand what the bad news is, the level of it, and maybe it's not as bad as it could have been. My people have responded well to this communication and responded better than if they are kept in the dark and left to assume the worst.

Likewise, Harvey found that employees experienced higher levels of job insecurity when their companies faced financial adversity and during the execution of retrenchment business strategies. Harvey maintained,

For the people that stay [surviving employees], I think that communication and engagement are probably more important at that point than ever before because typically everybody's wondering, "Does it stop here?" "Is there more?" "I might be next." Especially when it comes to a reduction in workforce, people want to know. It's pretty tough on the organization; there's a lot of concerns. So, I think my communication is more important at that point than ever.

The senior leaders consistently referred to the need to accelerate information sharing to maintain employee engagement. David shared,

I mean, going in, we [the leadership team and key employees] met twice a week. We kept ratcheting it [the forecast] down. We kept updating our expectations; we kept communicating about where things were going, right? Because everybody was very engaged in, "Hey, this is our business."

Similarly, Alex stated,

Again, overcommunication is what I think keeps the middle managers' focus sharp. And so, those would be your direct reports? Yes. Okay. And then again, never forgetting that we've got to be in touch with the frontline, so they know what's going on. They've [the frontline employees] got to see that you're engaging with them as well to prevent this feeling of isolation. I'm not left out here on an island.

Develop leader-employee relationships. The senior leaders stressed the need to interact with employees to develop relationships intentionally. The leaders believed that their relationships with employees during the industry recession enabled them to both empathize with

employees and to address unproductive behaviors when appropriate. Bob stated, “When a downturn or a time of a downturn comes, this provides you [the leader] an opportunity to get a little closer to employees, to empathize with their concerns.”

While the senior leaders indicated that their relationship with employees could positively influence employee engagement in all economic environments, the leaders suggested that their efforts toward building and maintaining employee relationships became more of a focus during the economic downturn. Charles confidently shared,

I think it’s important to try to establish some level of engagement, in particular with my field management or supervisors. What I would say is that during the downturn, even though that’s always kind of part of what I try to do, during the downturn, that effort is amplified.

Similarly, Alex found that he invested heavily in face-to-face time with employees. He described his efforts toward information sharing and relationship building:

In addition to one-on-one conversations, every time I was in a territory or in a region, I made a special effort to spend face-to-face time with these guys. It’s important that we utilize today’s technologies to get in front of them, but there’s just no substitute for face-to-face. And so, almost looking for reasons to make trips was important to me so that I could look across the desk, see the manager or the subordinate, and make sure that we spent the time talking with them about those things that were critical to the business and them, important to our market position, and important to the way we’re dealing with the downturn.

Senior leaders indicated that the leader-employee relationship enabled them to assess employees’ behaviors and to address these behaviors promptly. The leaders found that monitoring their employees’ behaviors was necessary because the stresses associated with the economic downturn negatively influenced some employees’ behaviors. Frank shared an example of a leader caring enough for his employees to intervene when appropriate:

During the downturn, I had to have heart-to-heart conversations with people either in a very positive and gentle way, and sometimes I have had to really challenge somebody who is behaving badly. I think you can have a productive conversation with those folks and tell them what you are seeing, and—“That isn’t who you used to be. You know, I think you’re in a place that you need to step back from.” For some employees, that can kind of wake them up and maybe improve the situation.

Emphasize the significance of employees to organizational performance. As with the participants' responses in a noncontextual setting, the participants recognized that their ability to inform and persuade employees that they were significant to the organization positively influenced employee engagement. Bob shared his perspective: "I let them know how their work impacted our organization and what it meant to their company in terms of profitability and giving them a sense of how we're leading the geographic region."

Alex's insights underscored the significance of investing more time encouraging the frontline employees. Alex's expressed his commitment to frontline employees:

I felt that it was important that I was in spending more time being in front of the field personnel. So, I traveled to the field more often and was on location more so I could sit down and have lunch with the guys and not try to pull them into my territory, but go out to their territory and to continue to let them know, "You are our greatest asset. You are the ones who make the company successful." I was giving them that level of encouragement from a leader standpoint.

Many of the senior leaders recognized that employees were experiencing higher levels of job insecurity and that, as leaders, they needed to reassure the surviving employees. Ira asserted,

So, I think giving people first some positive indication: "All right, we've had to make some adjustments [retrenchment business strategies], but the people that are here, you're here for a reason. You're deemed to be valuable to the company, and for our next phase of this business, we need you here."

Communicate the logic of retrenchment business strategies. The senior leaders indicated that their ability to explain their strategic retrenchment decisions influenced employee engagement. The business leaders proactively sought to communicate the logic of retrenchment business strategies and to respond to employees' questions and concerns regarding these strategies. Bob shared his experience, explaining his actions and decisions:

For example, being upfront with the guys [the employees] and showing them what the big picture is, showing them where we were going, what we were doing and what it actually meant. . . . I thought it was important to answer their questions when they thought their leaders were coming down on them so that they knew why these cost-cutting strategies were being implemented. I communicated that we cared about cutting costs because we are trying to protect jobs.

The senior leaders suggested it was their responsibility to explain their decisions so the employees would understand the strategies. John's response highlighted his determination to get his message out to his leadership team so that there would be a consistent message to the frontline employees. John maintained,

What we're doing is important to the employees, and they need to understand the strategies so what you're telling them and communicating to them is accurate and justifies what is being done. I communicated with the leadership teams so they understand in every way what was meant by this action or these things that were being imparted on our employees, such as loss of benefits or things of that nature. Understanding that in every way and being able to explain that to the best of our abilities was going to help keep them engaged through this process.

Many of the senior leaders recognized that surviving employees experienced some level of relief after a reduction in force but that leaders nevertheless needed to continue to explain the logic behind their retrenchment strategies to keep employees engaged at work. Charles noticed,

Their [surviving employees'] first natural reaction is relief. I missed, I didn't get this. But I think it's also important as soon as possible to convey the message to the remainder that we cut costs for good reasons and by doing this we are in a better position to survive the downturn.

Some leaders thought that when they developed and executed retrenchment strategies without explaining the strategy, employees were more likely to disengage. George observed,

I think sometimes what happens is you get into a significant downturn, and top management just pushes down directives and there are no clear explanations about the execution of those directives, where they're going to end up. This [lack of explanation from leaders] can be disengaging.

Contextual Core Theme 2: Address short-term business imperatives. While the senior leaders indicated that they monitored the oil and gas industry's economic indexes and trends, they found that the 2014–16 OFSE economic downturn caused them to become more internally focused. Moreover, they focused more on their firm's short-term financial requirements. As the economic environment deteriorated, the leaders were challenged to minimize their firms' financial losses and to take steps to sustain their enterprises.

Gain situational awareness. This subtheme had the highest participant response frequency rate of all the subthemes under the theme of addressing short-term business imperatives. The senior leaders indicated that they were continually assessing the oil and gas market's contraction and attempting to use this information to make productive decisions. Bob concisely stated, "As a leader, I must assess and understand the situation and take action."

The senior leaders also appreciated the need to monitor the surviving employees' engagement and morale. George stated,

They [employees] see the company contracting, losing people, you know, cutting the expense side, which is all part of a classical business retrenchment. I think in the contraction, we ran into some real challenges with employees because they may not be as upbeat because the market is down.

Likewise, Frank observed, "I think that the reality is that during the down cycle, there are always stresses that that enter into the workforce and affect employees."

As the senior leaders assessed their workforce, they found that their employees were also motivated to monitor industry news and to understand their firm's situation. The leaders found that employees were well informed. Ed stated,

Well, I think that what I found was that, so now you have a smaller group and basically they're aware that the industry is in a downturn. They are not in a bubble. I mean, they know their competitors are doing the same things we are [retrenchment business strategies]. They see what is happening; they read the newspapers and know what's going on.

George discovered that the employees' awareness of the industry's volatility and their organization's adverse financial situation could be a serious distraction and could lead to disengagement. George suggested,

I mean, there's a variety of things that can pull them away from their focus on their current assignment. And the problem is, you need them more engaged and focused than ever before during the downturn. For various reasons, employees can get disengaged, especially in this industry where, you know, your activity level for a firm may be cut in half over a 6-month period, which probably doesn't happen in other industries.

While the senior leaders consistently emphasized the need for continual situational assessments, David was the only participant to suggest that he sought information from an external source to evaluate employee engagement. David proposed,

I found that the strongest indicator of engagement with any organization is, number one, is our clients. Clients will tell you whether or not your people are hooked up [engaged]. Are they being responsive? Are they going the extra mile? Are they checked-in or checked-out?

The senior leaders also recognized the significance of assessing competitors' strategies and activities during the economic downturn. Ira shared an experience within his firm that underscored the ultracompetitive environment that the industry contraction created:

It was very hard to keep the field employees engaged when everything that we'd been teaching them, encouraging them to do, they were doing great. So, they go out, they were starting the job on time. Service quality is good. They're taking good care of the equipment. Customers on location are giving them perfect marks as far as service quality reports. Field ops [operations] are going great. We lose the next job to somebody else because somebody [a competitor] comes in and undercuts our pricing. Your outstanding work crew doesn't have a job that week. The competition has undercut our prices, and now my guys are asking, "Why aren't we working?"

To further challenge leaders' situational analysis, the leaders shared that the OFSE industry is more unpredictable and volatile than many other industries. The leaders' experiences support the notion that the duration of the industry contraction was unknown; therefore, they indicated that they aggressively pursued retrenchment business strategies to offset the lower levels of activity and profitability. Frank voiced a common refrain:

The problem is, we [leaders and employees] can't predict when it [an industry recession] really is going to turn around, and if we really step back and look and listen to the macros [macroeconomic indicators], it's not turning around this month or next month. It's probably not turning around in 6 months and maybe not in a year. And so at this point, we can't afford to carry a lot of excess costs.

Focus on short-term financial profitability. It can be appreciated that business leaders seek to maximize profits, so it is not surprising that the senior leaders' responses regarding the 2014–16 industry recession reflected this business goal. However, in this adverse economic

environment, it became apparent that the senior leaders were focused on sustaining a financially vulnerable company, and for some participants the goal became firm survival. George echoed the overriding sentiment of the leaders when he stated, “I am trying to minimize the negative economic impact of the downtown.”

Given that OFSE firms invest heavily in training their employees, the senior leaders indicated that they attempted to balance their financial responsibilities with their desire to keep as many employees employed as practicable. Ira’s actions during the economic downturn mirrored the actions of other participants. Ira maintained,

[I was] really tearing apart every line on the profit-and-loss statement. Where is every single dollar that we can save? And when things are good—not that it [profitability] is not important—but you’re not trying to keep the lights on and save jobs.

Similarly, Frank found that his focus shifted significantly toward financial profitability during the downturn. Frank stated,

During the upcycle [market expansion], when financials kind of take care of themselves to some degree, I’m more focused on job quality, service quality, the customers’ feedback on how we’re doing, and I like to dabble in some of the technical things. That’s just part of my personality. In a downturn, I’m not getting involved in that. I had more of a financial focus in the downturn and how best to mitigate the negative impact on profitability.

Charles revealed that the industry downturn had put his firm at risk of bankruptcy, which forced him to abandon his long-term goals and to focus on retrenchment business strategies. Charles shared,

So, we laid off many people. We had to start reducing employee benefits, reducing cost, doing all these things [retrenchment business strategies] to control costs. I call it playing defense: We put the defense on the field and finally it got down to only playing defense.

The senior leaders explained that in the economic downturn they needed to shift their focus to retrenchment business strategies and their company’s financial sustainability. Ira stated,

In the recession, my focus was much more internalized in the company. I’m looking for wasteful spending. I’m analyzing the unnecessary positions. I’m evaluating our internal

business lines, whether or not they all are still relevant in this current market. So, cost-cutting was a heavy focus during the recession.

Similarly, Harvey reflected on his company's financial condition:

I think when we were challenged with lower profitability of the business. This [economic challenge] always seems to draw people's focus into cost control. I tried to keep focused that it's about survival. It's about doing what you have to do. Some of those decisions have to be made; somebody has to do it [implement retrenchment business strategies]. If you don't manage that well, the result can be nobody has a place to work and where nobody is providing for their families.

As surmised by Harvey, the leaders' long-term objectives were not the focus during this industry contraction. Retrenchment business strategies and business sustainability—and for some leaders survivability—became their immediate objectives. George suggested, “There is no long-term future without a short-term future.” The senior leaders also recognized that organizational sustainability was related to sustaining jobs, and saving jobs was a leadership priority.

In contrast to the other participants' focus on cost-cutting to enhance their firms' profitability, Bob linked gaining market share with job security and employee engagement:

But I also knew that we still had to deliver to the customers, that customers still had an expectation. And this is the time where you can really, in my mind, where you can really try to grab more of the customer opportunities. We wanted to keep these customer contracts but also knew what it would do for our employees and their level of engagement.

Sense of urgency: Establish organizational priorities. The senior leaders established that they experienced a sense of urgency and sought to prioritize their individual and organizations' activities. George's perspective was that leaders had to develop and implement their plans quickly but thoughtfully. George reasoned,

I think what changed is kind of the urgency of the tactical plan. So, as you evaluate a business that's involved with a deep cyclical contraction, which is what we saw in 2014 through 2016, I think you've got a sense of urgency that you have to deal with it. So, you have to not take as much time to evaluate what changes you need to make in terms of a tactical plan. You got to do that quickly. Decisions are much more time sensitive and require more thoughtful consideration. Now, in a downturn, you're thinking, you know, “Every minute is costing me money. What are my options to try to maintain those things

that are important to the company as far as strategies?” You’ve got to identify what your priorities are.

Ed found that he needed to adapt his firm to the lower activity level as quickly as practicable but also that engaging employees is crucial during this transition. Ed proposed,

Essentially if you’re going to reduce the capabilities of the organization in terms of product lines, in terms of people, reorganizations that happened, I think you’ve got to do that quickly and I think you’ve got to get the right people involved.

Similarly, John emphasized the need to execute retrenchment business strategies quickly so that the surviving employees could adjust to the firm’s new direction. John stated,

I believe the best thing to do is make the right decisions and make them as quickly as possible, so the rest of the organization can move on. You have to execute [retrenchment business strategies] quickly. So, you’re going to lay off people, cut benefits, get it done.

Participants also recognized the importance of prioritizing key employees during the economic downturn. David stated,

We were getting new pieces of information every day about what [did] we think the future was going to hold? So, I think that we did what most people expect you to do, which is to prioritize keeping our core people. You have to make tough choices.

Contextual Core Theme 3: Establish leadership credibility. The senior leaders’ responses to the interview questions suggested that they recognized that their employees assessed their credibility during the 2014–16 industry recession. Furthermore, the leaders understood that their credibility influenced their employees’ engagement as they implemented retrenchment business strategies. Three subthemes emerged from the qualitative data, and these subthemes revealed the participants’ experiences and perspectives regarding the significance of their efforts toward establishing their credibility with their employees. The subthemes included (a) engage in thoughtful and trustworthy communication, (b) demonstrate leadership competencies, and (c) preserve organizational talent.

Engage in thoughtful and trustworthy communication. All of the senior leaders emphasized the significance of honest communication to their workforce and discovered that

their explanation of their firm's situation and retrenchment business strategies influenced employee engagement. Harvey reflected,

I think it's important that you're upfront and honest with people. I think clear communication, addressing where we are—these are the challenges we face so that everybody understands this is where we are and this is why we need to cut costs.

Likewise, Ira linked his honest communication concerning the company's situation and challenges with sustained employee engagement. Ira concluded,

Every company is somewhat of a unique spot when tough decisions have to be made. But I think to keep people engaged initially, one of the best things to do is to reach out to basically the entire company and say, "Look, tough times are coming. I don't want anybody ignorant here that the market's not going to cause this company to have to go through some changes. My ultimate goal—clear communication—our ultimate goal is that we want to keep everybody we have, we want the company to stay the same size it is. We want to keep working, but the reality is the company's going to have to adjust."

Ed described his experience that employees wanted to understand the retrenchment strategies and that leading engagement called for communicating these strategies:

I mean, they realize that everybody's involved in it, and they know that they're getting 30% less [pay] than what they were getting before. So, something's got to give, and usually the bottom line suffers. At the end of the day, you [employees] might have to do more work because we are not as profitable. You have to communicate to the people what is going on and what are the reason[s] for the retrenchment strategies. They want to know what's driving the leadership team's decisions.

Most of the leaders recognized the importance of thoughtful communication during this challenging economic environment. Charles commented, "These exercises [retrenchment strategies] need to be well thought out, and leaders need to communicate the immediate plan and the recovery plan carefully. This is very important." In the same vein, George found that leaders needed to address employees honestly and help them understand the seriousness of the situation.

George maintained,

I think you've got to look at how people feel when threatened and try to brace the employees for what's to come in a severe downturn. I think the biggest challenge for any supervisor or manager or executive is to really be thoughtful about how you communicate and engage with the employees.

The senior leaders also indicated that they sought to lead with integrity, and at the same time there was information that could prove to be disengaging. Bob described his experience regarding the need to resolve that communication balance:

As the leader, I'm having to answer for myself and the organization and understanding how I want to approach the organization with answers. I need to be able to address them [employees] with truth as well as keeping some information confidentiality.

Demonstrate leadership competencies. While the desire to demonstrate leadership competencies was a common goal of the senior leaders, John concisely linked it with employees' concerns: "I needed to lead in a way that employees can see that leadership is doing a good job of mitigating the risk of people getting laid off." Many of the senior leaders talked about their leadership team's experience and how these leaders helped the organization adapt and survive during the adverse financial environment. George related leadership competency to employee confidence:

I made sure they [employees] understood that their leadership is very experienced. If, if there's a sense that management has been through this before, they'll take us through to the other side. You know, as the market expands, troughs, and then starts to expand again, I think that employees take comfort in having strong leadership.

This subtheme was also described in a story in which Bob shared his experience, demonstrating his competency by securing work from a client and for his workforce:

To ensure we had job stability, we extended some contracts for 3 years. So, for example, we had a contract that was due to expire sometime in 2015, and the customer was asking for concessions. We wanted [were motivated] to give those concessions because we knew if the contract was going to expire and it went to market to retender, the market price may be much lower. So, it would behoove us to negotiate an extension on the current contract and to give concession. From an employee morale standpoint, you've got all this whirlwind of, "Hey, they're laying off [staff]. This [more layoffs] is what's happening," and I was able to communicate that within my organization: "We have been awarded a 3-year contract. You guys are good [have job stability] as long as you go out and perform [well]. We are going to be here, and we're going to see this through."

In contrast, some of the senior leaders recognized that their actions could negatively impact their credibility with their employees, and they identified leadership actions that employees would view as unjust or inconsistent. For example, Ed shared,

If I had made some illogical decisions, or if you ever get into a situation where your team thinks that you're making decisions based on personalities rather than an honest ranking of the employees, and you hurt the organization, you can lose their faith in you. You lose your leadership capability to engage the ones that think you've done something unjust.

Likewise, David described a project that highlighted how inconsistent leadership could negatively affect employees' engagement. David explained,

Building a new and expensive manufacturing facility in a strong market was a decision I really regret because I let the COO convince me to do a vanity project, and I think nothing hurts engagement with employees more than vanity projects because you end up looking inconsistent. You can't spend like a drunken sailor in the good times and expect frugality in the down times. If you set that expectation, I think it will disillusion people.

Preserve organizational talent. Moving into 2014–16, the senior leaders indicated that they anticipated the need to execute reductions in force, and they recognized the significance of retaining as many engaged employees as possible. The leaders also demonstrated their willingness to lay off employees who were disengaged and marginal performers and reported that they found this action could be engaging. Bob's experience linked laying off disengaged employees with support from the surviving employees:

It is important to understand the big picture of why leaders act in ways to protect the workforce. Employees need to understand why something was implemented and then turn it into a positive. For example, laying off unengaged people was seen as a good thing by the [surviving] employees.

Many of the senior leaders discussed their experiences retaining talented and engaged employees for as long as practicable. Ed shared an example of retaining highly skilled employees and utilizing them in lower-skilled tasks:

You're working with a smaller staff. You're asking them to do more than before, and you're asking for a lot more multitasking. One of the things that we tried to do—and I think was the right approach—is to keep the skilled people that you have, the people that you've trained that are skilled people. For example, we had welders, and it takes a long

time to develop welders to weld special materials and get qualified. But with the reduced amount of orders coming in and lower levels of work, the need for all the welders was not there. Rather than letting the welders go [laying them off], we convinced them that we needed them to do other things like grinding and things that they may have been overqualified to do. To go in and do that to keep skilled people, you might have to pay them more money per hour than you would have paid a grinder, but you were able to retain the talent. I think doing things like that showed our employees that we wanted to keep skilled people. That was the right decision, and it showed these people that when things did turn around and come back, that the skilled people that worked here were valued and that we were trying to retain those skill sets. Also, the people that were lesser skilled saw that, and that would drive them to become more skilled because they want to be in that same situation, that they will be known as critical to the operation of the company.

Similarly, leaders continually assessed their employees and diligently strove to keep their talent as long as possible. David stated, “I kept working with my managers and we evaluate peoples’ performance and importance to the business. We kept our core people as long as we could.”

Frank presented an outlier perspective regarding the challenge of preserving talent, finding that in the downturn, competitors were interested in his best employees. Frank said,

But the bottom line is that the strongest in the group, they’re also in demand, even in a downturn. My good people are going to be pilfered or attempt to be taken. So, I want those guys [engaged employees] to stay with me, right? I’ve experienced this in the downturn: I started hearing that somebody [a competitor] is making a run at my guys. So, what I’ve done . . . is to communicate that “You’re here for the long haul. I can’t promise you we’ll never do another layoff, but I can promise you this: that we think highly of you and you’re a guy that we expect to stay around.”

Contextual Core Theme 4: Nonproductive nature of employee disengagement. This cluster of subthemes spoke to the employee challenges leaders faced during the 2014–16 industry recession. Whereas the leaders’ noncontextual responses to the interview questions uncovered their perspectives regarding the supportive nature of employee engagement, their contextual responses emphasized the interaction between retrenchment business strategies and the nonproductive nature of employee disengagement during an economic downturn. In addition, whereas the first three contextual core themes revealed the leaders’ insights and experiences concerning how their implementation of retrenchment business strategies interacted

with their ability to influence employee engagement, this contextual core theme emphasized the nonproductive nature of employee disengagement during an industry recession. The subthemes included the following: (a) concerns and distractions lower engagement, (b) lower levels of employee morale and engagement, (c) unproductive interpersonal interactions, and (d) uncertainty and fear lead to inaction.

Concerns and distractions lower engagement. The senior leaders found that the economic downturn and the implementation of retrenchment business strategies distracted their employees and produced employee anxiety, which adversely affected employee engagement.

Alex shared an example that illustrates how distractions can lead to employee disengagement:

There were people on the phone talking about how bad the situation is—I mean, who got laid off and all those conversations that go on [after implementing retrenchment business strategies]. That would be an example of [employee] disengagement. They're clearly not engaged [in work] at that point in time. And it's not a productive type of environment. I saw [in] a lot of teams around us that their productivity had gone to very minimal levels and they were just thinking whatever's going to happen is going to happen.

Similarly, Harvey explained,

It [executing retrenchment business strategies] is always kind of a shock to the system. So, people, I think, are naturally distracted. That's what they are thinking about. They're not thinking as much about their job task. They are thinking about, "What am I going to do if I get laid off next week?"

Moreover, the leaders recognized that their retrenchment strategies were concerning to their employees and that the employees might have assumed the worst outcome. Frank said,

My experience suggests that the norm is, when you're going to do a reduction in force and reduce the organization, there will be a heightened level of concern in the organization. I think that there is a natural human tendency to consider the worst option, right? To come to grips with the worst that might be out there. And then that sort of becomes the expectation with some people.

The leaders also recognized that their fiduciary responsibilities created distractions, which limited their ability to engage their workforces. Ira shared his experience around the time

required to develop and execute retrenchment strategies and his ability to engage with employees:

I think there was definitely just less available time to try to engage them and continue to maintain a rapport with them. I was distracted as well. It was harder to make sure that everybody's feeling appreciated or, you know, just letting them know that their efforts are truly helping make a difference.

Lower levels of employee morale and engagement. Given the aggressive nature of the senior leaders' retrenchment strategies, the leaders often cited employee concerns and disengagement. Harvey commented, "Employee reductions, wage reductions, fewer people—your employees are concerned. It's more challenging to engage them after the implementation of cost-cutting strategies."

The senior leaders also recognized that they needed to address lower levels of employee engagement and morale. Bob maintained,

I think trying to manage some of that angst within the ranks [workforce] gets to be a challenge. So, reengaging them has to be your focus. Otherwise, you could end up with a—maybe not a physical mutiny on board but a morale mutiny on board.

Uncertainty and fear lead to inaction. Many of the senior leaders mentioned this subtheme. They recognized that employees felt vulnerable and were overwhelmed with the speed and severity of the market collapse, so they disengaged from the vital job of adapting to the adverse economic environment. David's experience was that employees did not want to accept the gravity of the situation, and their fear and doubt grew into disengagement. David reflected,

Employees could think the worst and became overwhelmed during a downturn. I think there was a sense of disbelief around the market change and that made it really hard to engage people. So, I think there was indecision and inertia there.

While the senior leaders appreciated that adaptive change was required to sustain the business, their management groups were slow to react. George observed that managers, like frontline employees, also succumbed to mental paralysis during the industry recession:

And so, in the downturn, I would approach a management group about their business strategy and what's their view on the marketplace and, you know, what's their plan in this downturn? And I hate to describe it this way—the feedback would be business as usual, you know—“We'll work our way through this.” They didn't really have any interest in thinking about how to improve the operation in business.

Unproductive interpersonal interactions. Finally, there was an awareness that retrenchment strategies result in higher levels of workforce stress and that these stresses can lead to disengagement and interpersonal conflict. John's experiences suggested that employees' responses to stress could result in unproductive interpersonal interactions. John concluded,

Even if they [employees] are resilient, there are different levels of stress. You know, you have employees who don't respond well to stress, and they don't respond well in very different ways. It can vary from violence to depression to anger and turn into interpersonal issues between employees.

In contrast to the positive employee reactions observed after disengaged employees were laid off, some leaders found that their retrenchment strategies created concern and anger within the workforce when engaged and productive employees were laid off. Bob observed,

When a reduction in force was announced, there were complaints from the guys [employees] that were still on the team that may have worked with a guy for the past 5 years and knew how well he performed, but now he has been laid off. They were worried and angry that they may be next to be laid off and were upset with the organization because of what's going on [implementation of retrenchment business strategies].

Summary

The purpose of this qualitative study was to explore the experiences and perspectives of U.S. OFSE leaders regarding how they engaged employees and how their execution of retrenchment business strategies during a severe and protracted industry recession interacted with their ability to engage their employees. Chapter 4 included findings that illuminated how senior leaders' implementation of retrenchment business strategies during a significant economic downturn interacted with the leaders' ability to engage their workforce. The lived experiences of the senior leaders and the narratives that originated from these experiences were the source of significant and relevant data. The presentation of senior leaders' narratives and the frequency of

the participants' responses provided insight into the development and significance of the core themes and subthemes.

Chapter 4 included the results of a pilot study, which indicated that the research design and procedures employed to solicit participation and protect the study participants were sufficient and appropriate. Additionally, the results of the researcher interview and the data analysis were presented as my presuppositions regarding the study. As noted, I practiced reflexivity, bracketing, and reduction to facilitate scientifically rigorous data collection and analysis.

In this chapter, I provided rich and detailed insights developed through the collection and analysis of the qualitative data. This chapter contained information related to the research methodology, which was a qualitative phenomenological inquiry. I used Colaizzi's (1978) phenomenological analysis method to interpret the data and to develop core themes and subthemes to describe the phenomenon. Furthermore, the chapter included a description of the data analysis technique, which included the use of Dedoose and Microsoft Excel to bring scientific rigor to the analysis through systematic categorization and organization.

The data collected for this research study were relevant to the research question and purpose. Given the number of significant statements the participants (senior OFSE leaders) provided, the data were rich and extensive. (See Table 11 for a matrix that lists the core themes and subthemes and each participant's contribution to the themes.) The qualitative data and the research findings suggested that the senior leaders' ability to engage their employees while concurrently implementing retrenchment business strategies was impacted. This interaction between engagement leadership and retrenchment business strategies is addressed in Chapter 5 of this research study.

Chapter 5: Discussion

The general problem I investigated in this study is that while U.S. business leaders may recognize the organizational benefits of engaged employees, a large percentage of their employees are not engaged or are disengaged (Gallup, 2017). These generalized findings suggest that employee disengagement is a significant problem for business leaders. The specific business problem I investigated is the lack of understanding of how leader-driven retrenchment business strategies during a severe economic recession interact with leaders' ability to engage employees.

The purpose of this qualitative phenomenological study was to explore, discover, and understand the lived experiences and perspectives of U.S. OFSE leaders responsible for the development and execution of retrenchment business strategies during an economic downturn and to describe and explain how these retrenchment business strategies interacted with leaders' ability to engage their employees. The ultimate goal of this study was to develop practical knowledge that enhances engagement leadership practices and workforce engagement while executing necessary retrenchment business strategies. Relative to the study's purpose, the central research question was, How do U.S. OFSE leaders' retrenchment business strategies within the context of a severe and protracted industry recession interact with their ability to engage their workforce?

The study's central phenomenon was the engagement leadership experiences of senior OFSE leaders during the 2014–16 industry-wide economic contraction. I used a qualitative phenomenological approach to explore the lived experiences of senior leaders. The participants' responses to the interview questions, and to a lesser extent my observations during the interview process, provided insight into the phenomenon as experienced by the senior leaders. The

leaders' lived experiences revealed insights into the interactions between their execution of retrenchment business strategies and employee engagement.

Scholars and practitioners should be wary of using broad generalizations to develop relationships between the implementation of retrenchment business strategies and leading workforce engagement. Although in this study I focused on the U.S. OFSE industry during a severe and protracted industry recession, the research findings may be applicable to other sectors and geographic regions outside the United States. This research was limited in that the results were based on a specific context: an industry-wide economic contraction. Therefore, the findings and recommendations may not apply to organizations that execute retrenchment business strategies due to other factors, such as service or product obsolescence, uncompetitive cost structure, or changing customer preferences.

This chapter contains the study's results and citations to the relevant literature, which demonstrates descriptive and interpretive coherence. Specifically, this chapter includes a discussion and interpretation of results comprising seven core themes and 27 subthemes. The themes illuminate the interaction between leading employee engagement and executing retrenchment business practices. This chapter contains the study's limitations, practical recommendations based on the results, future research opportunities, and conclusions drawn from the research.

Discussion of Findings in Relation to Past Literature

During the 2014–16 industry-wide economic contraction, the senior OFSE leaders who participated in the study experienced dramatically lower demand for their firm's products and services as their customers (U.S. oil and gas producers) scaled down their spending. Weaknesses in the price of oil and natural gas negatively impact OFSE firms' profitability; therefore, these leaders adapted their organizations to significantly lower revenues and profitability (McManus &

Mosca, 2015). The participants willingly shared their insights into and accounts of the study phenomenon and described what it was like to manage two seemingly conflicting imperatives: motivating employees to engage at work and implementing retrenchment business practices. The following discussion of the findings in relation to the existing literature illuminates the contextual complexity of leading employee engagement.

Core Themes and Subthemes

After collecting the qualitative data from the 10 research participants, I analyzed the data to reveal themes, which I categorized as either core themes or subthemes based on my analysis of the data. Synthesis of the findings allowed me to develop a comprehensive description and structure of the study phenomenon. I generated the core themes and subthemes based on the study participants' responses to their general or noncontextual lived experiences of engagement leadership and to their lived experiences of concurrently executing retrenchment business strategies and leading engagement. I classified the themes that emerged from participants' responses based on their lived experiences in the 2014–16 economic contraction as contextual themes. I classified the themes that emerged from responses that were not grounded in the economic downturn as noncontextual. I compared the variances between the noncontextual and contextual core themes and subthemes to illuminate the interaction between engagement leadership and leader-driven retrenchment business strategies.

Before launching into a discussion of the findings in relation to the literature, I find it helpful to emphasize the contrast between the noncontextual and contextual core themes that emerged during the analysis of the data. Figure 3 is a schematic representation of the noncontextual and contextual core themes and illustrates how leader-driven retrenchment business strategies interacted with engagement leadership during the severe and protracted 2014–16 economic downturn. The contrast between the noncontextual and contextual core themes

Core Themes

Contrast Between Non-contextual and Contextual Core Themes

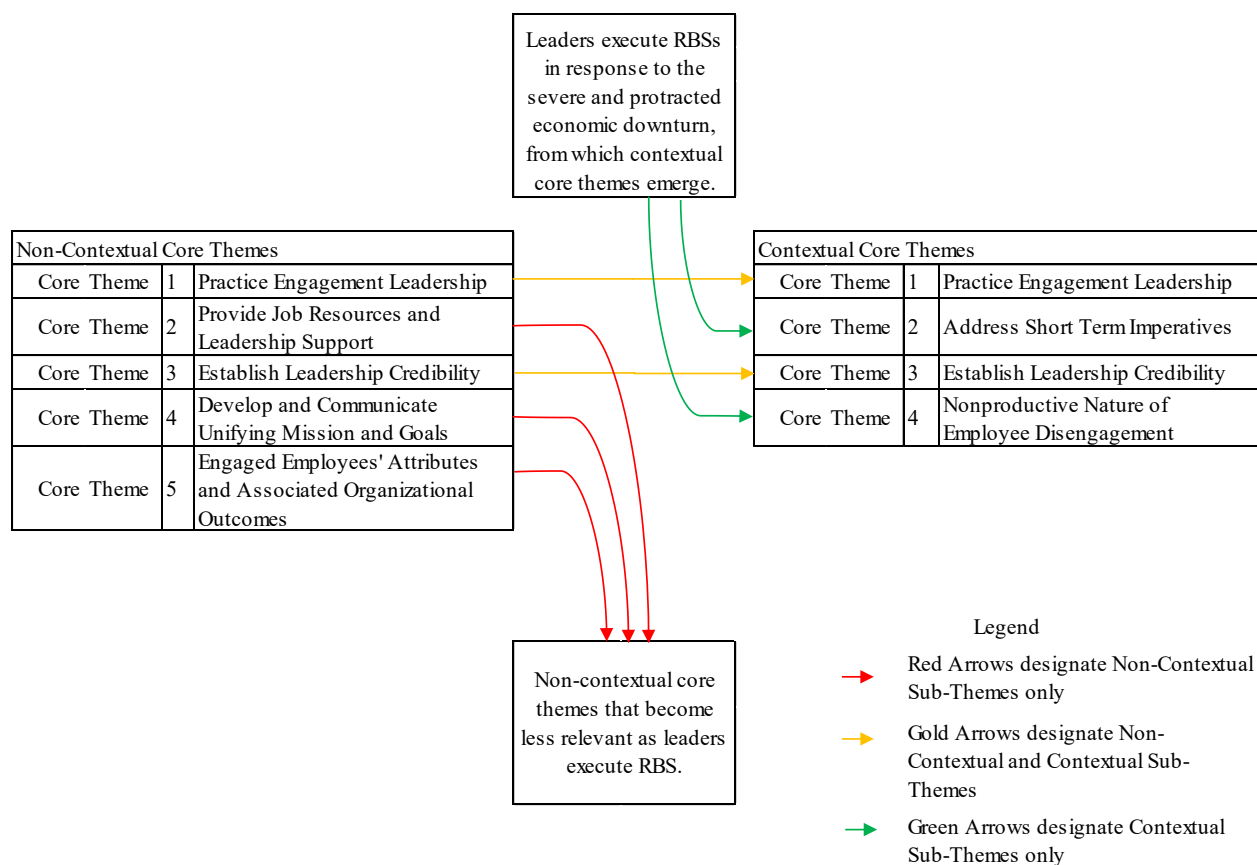


Figure 3. Contrast between noncontextual and contextual core themes.

illuminates how participants' execution of retrenchment business strategies interacted with their engagement leadership. As presented in Figure 3, some of the common core themes were independent of context. In contrast, other core themes emerged from participants' experiences during the execution of retrenchment business practices, and still others were noncontextual core themes that became less relevant during the economic downturn. Similarly, I found that several subthemes under the common core themes—practice engagement leadership and establish leadership credibility—varied significantly, which indicated that engagement leadership is situationally specific.

The results of the study are presented in the following order: The noncontextual core themes and subthemes are presented first, followed by the contextual core themes and subthemes.

Noncontextual Core Theme 1: Practice engagement leadership. Phenomenological analysis of the qualitative data collected from senior OFSE leaders revealed 81 significant statements categorized as subthemes under the overarching core theme of practice engagement leadership. Practice engagement leadership differs from the other core themes in that the participants proactively sought to interact with their employees to develop leader-employee relationships and understanding. The noncontextual core themes and subthemes can be found in Table 9.

Encourage leader-employee dialogue: Give employees a voice. The participants indicated that there was a positive relationship between the leader-employee dialogue and employees' level of engagement. The senior leaders recognized the importance of employees' perspectives regarding leaders' openness to employees' opinions and ideas. The senior OFSE leaders suggested that they initiated and encouraged leader-employee dialogue and gave their employees a voice as a means of motivating employees to engage at work.

Similarly, researchers have determined that leaders who encourage employees to talk openly and who are interested in their employees' opinions can motivate employees to engage and become more productive (Ruck et al., 2017). Employee perceptions of having a voice in the organization and having receptive leaders can positively influence employees' motivation to engage at work (Ruck et al., 2017). For example, leaders who engage employees in developing priorities and decision-making are likely to improve employee engagement and organizational outcomes (G. Allen & Dovey, 2016). In contrast, job demands and employee disengagement increase when personal interactions are challenging (Bakker & Demerouti, 2007).

Develop leader-employee relationships. The subtheme of developing leader-employee relationships was pervasive regardless of the economic situation. The participants sought to establish relationships with their employees to foster employee-leader understanding and to enhance employees' attitudes toward their leader. The participants indicated that the leader-employee relationship could motivate employees to engage at work. Researchers have established that leader-employee interactions can positively influence workforce engagement (Blomme et al., 2015; Schaufeli, 2015; Xanthopoulou et al., 2009).

Supportive leader-employee relationships have been linked to higher levels of psychological safety and engagement (May et al., 2004). Kahn (1990) asserted that employees' perspectives regarding psychological safety impacted their work engagement. The leader-employee relationship can positively influence an employee's level of psychological safety. Saks (2006) found that leader-employee engagement is based on a reciprocal process in which each party assesses the cost and benefits of the relationship. The participants indicated that they were committed to investing their time to develop supportive relationships with their employees as a means of motivating employee engagement.

Seek to learn and leverage drivers of employee engagement. The senior OFSE leaders reported that they sought to learn the engagement drivers for each of their employees. Through qualitative phenomenological analysis, I found that leaders recognized the benefits of engaged employees and actively tried to determine what motivated employees to engage at work. While there is extensive research into the antecedents of employee engagement (Albrecht et al., 2015; Bakker & Demerouti, 2007; Brough et al., 2013; Kahn, 1990), the research participants indicated that the drivers of engagement varied across employees and that as leaders they were responsible for learning the engagement drivers for individual employees and leveraging these drivers to motivate employees to engage at work.

The study participants suggested that investing time in learning what motivated each employee to engage at work was a precursor of employee engagement. Furthermore, the participants indicated that leaders and employees needed to understand each other's expectations as part of the employee engagement process. Although Bakker and Demerouti (2007) found that job resources such as leadership support could shield against the adverse effects of job demands, they did not address how to individualize the process of determining and leveraging employee engagement antecedents. Given the individualized nature of engagement antecedents, organizational leaders need methods that enable them to identify each employee's engagement drivers accurately.

Carefully assess employee engagement. This noncontextual subtheme expressed how leaders went beyond their impressions of employees to assess their level of engagement. The leaders emphasized how their personal biases regarding employee engagement behaviors could affect their assessment of employee engagement. This bias recognition motivated the leaders to go beyond their initial perceptions and perform in-depth assessments to evaluate employee engagement. The study results indicated that without an in-depth assessment, the employee's personality and the leader's presuppositions could skew the leader's perception of the employee's level of engagement, which could lead to inadequate or misinformed engagement leadership interventions.

Although researchers have posited that leaders should focus on assessing an organization's internal and external environment and balancing job resources and demands to encourage employee engagement (Bakker & Demerouti, 2007; Kahn, 1990), there is scant research into leaders' personal assessment of employee engagement as discussed by the study participants. Blanchard et al. (2013) through their situational framework emphasized the need for leaders to assess situations and to determine the needs of employees and that leadership

activities based on these assessments could lead to higher levels of employee engagement. Similarly, Bass (2008) posited that leaders are responsible for assessing their organization's environment and capabilities and deciding whether to empower employees or focus on systems and processes that limit employee autonomy. Although engagement researchers have suggested that leaders are responsible for assessing their firms' internal environment, their research has not specifically addressed the significance of leaders accurately determining an employee's level of engagement as a precursor of leadership interventions directed at increasing employee engagement.

Emphasize the significance of employees to organizational performance. This subtheme was a common subtheme across economic situations. The participants' lived experiences indicated that leaders are responsible for conveying the importance of employee performance and linking individual and team performance to the overall performance of the organization. This theme aligned with Kahn's (1990) seminal research, in which he found that employee engagement depended on an employee's perspectives regarding the meaningfulness of the work.

Bakker and Demerouti (2007) proposed that job resources such as participation in decision-making and job control could motivate employees to engage at work and improve performance. Moreover, researchers' findings suggested that employees value job resources such as task significance and individualized feedback (Bakker & Demerouti, 2007; Christian et al., 2011). The senior OFSE leaders sought to emphasize the meaningfulness of the employees' work relative to organizational performance as a means of motivating their employees to engage at work.

Noncontextual Core Theme 2: Provide job resources and leadership support. There were 34 significant statements that directly supported the relevance of leadership support and job

resources. Subthemes under this core theme included (a) empower and support employees, (b) invest in employee development, and (c) ensure employee job fit.

Empower and support employees. Leaders emphasized the positive relationship between higher levels of employee empowerment and engagement. The senior leaders maintained that empowering employees to make decisions and supporting their choices encouraged employees to engage at work. Empowering leaders can positively impact employees' perceptions regarding work demands and resources—and thus engagement (Tuckey et al., 2012). Similarly, Kahn (1990) discovered that empowering and supportive leaders who allowed employees to control their work and to experiment without fear of failure increased levels of engagement. Moreover, researchers have determined that employees value job resources such as participation in decision-making, job control, and leader support and that these job resources can motivate employees to engage at work (Bakker & Demerouti, 2007).

Invest in employee development. The participants suggested that investing in personnel development could motivate employees to engage at work. The participants indicated that there was a positive relationship between leaders' involvement in encouraging and enabling employees to participate in professional development and employee engagement. Similarly, Saks (2006) found job resources such as training programs that stimulate personal growth, learning, and development positively affected employee engagement.

The senior OFSE leaders indicated that their support in the form of leader-to-employee feedback was fundamental to employees' engagement. Researchers have also suggested that leaders who coach and mentor employees and show attention to their employees' development can motivate their employees to engage emotionally, cognitively, and behaviorally at work (Shuck & Herd, 2012). The participants emphasized that giving their employees experiences and opportunities to learn outside their formal roles could be engaging and productive. Likewise,

Bakker and Demerouti (2007) indicated that relevant job resources such as career advancement opportunities could increase employee engagement.

Ensure employee job fit. The senior OFSE leaders emphasized that they were responsible for ensuring that employees are in a role that benefits both the company and the employee. The participants also recognized that the employees' skills and personality influenced their performance in a given job or team. May et al. (2004) found that work-role fit is positively linked to psychological meaningfulness, which is a precursor of employee engagement. Moreover, employee engagement is a function of employees' perceptions regarding job resources and demands and their self-efficacy (Bakker & Demerouti, 2007).

Beyond job fit, the results of this study revealed that employee-organizational fit could also affect employee engagement and productivity. As asserted by Albrecht et al. (2015), organizational culture, climate, and resources are distal engagement antecedents. Whether due to poor job fit or organizational fit, employees may experience reduced personal accomplishment, impaired self-efficacy, and disengagement if they fail to meet work standards (Demerouti et al., 2001). Of course, poor job fit can be corrected within an organization, whereas poor organizational fit suggests that the leader may need help the employee find work in a different organization. As proposed by Welch (2001), when there is poor employee-organization fit, both the employee and firm suffer, and it is best to help that employee exit.

Noncontextual Core Theme 3: Establish leadership credibility. The core theme of leadership credibility emerged through the integration of subthemes emphasizing participants' perspectives of the relationship between their ability to demonstrate professional competency and employees' perceptions and willingness to engage. The subthemes that stressed the senior leaders' responsibilities to their organization included (a) lead ethically and earn trust and (b) hold employees responsible and accountable for their performance. The participants' responses

highlighted the interaction between their credibility as senior leaders and their ability to positively influence employee engagement.

Lead ethically and earn trust. The participants indicated that ethical leadership was vital to establishing their credibility with their workforce. This subtheme suggested that employees observe and evaluate their leaders' behaviors and performance. The participants proposed that there is a positive relationship between a leader's credibility and the employees' motivation to engage at work. Zhu and Akhtar (2014) posited that follower trust is a function of the leader's knowledge, capability, dependability, and integrity. As suggested by the study participants, employees assess their leaders' trustworthiness and evaluate the cost and benefits of genuinely supporting the leaders (van Dierendonck et al., 2014).

The senior leaders asserted that treating employees justly enhanced employees' perspectives regarding their leader's credibility. Saks (2006) indicated that a leader's leadership objectivity is a crucial organization engagement antecedent. Moreover, researchers have found that leaders who practice organizational justice can encourage higher levels of employee performance (Wang et al., 2015).

The participants suggested that leadership transparency and consistency are employee engagement antecedents. Ulmer (1997) asserted that gaining the trust of employees requires business acumen. In contrast, an employee's decision to disengage at work can be the product of untrustworthy professional relationships (Gallup, 2017).

Hold employees responsible and accountable for their performance. The participants indicated that establishing credibility also included setting employee expectations and holding employees accountable for their performance. Although empowering leaders can positively impact employees' perceptions regarding work demands and resources, and thus engagement (Tuckey et al., 2012), it also transfers ownership and accountability to the employees and teams

closest to work (McChrystal et al., 2015). The participants suggested that ignoring poor employee performance could reduce their credibility, which could facilitate lower levels of employee engagement and productivity.

The present study revealed that the leaders were aware that employees assessed leaders' alignment of rewards and corrective actions with their perception of objective performance and that employees were more likely to be engaged when they were held accountable for their performance. Prewitt and Weil (2014) posited that leadership attributes such as fairness and credibility are linked to transparent communication and accountability. Accountability and empowerment can be viewed as opposite sides of the same coin. Leaders who engage their workforce through participative empowerment can foster job ownership and accountability (S. Kim, 2002).

The participants linked the value employees placed in leaders' praise and recognition to leaders' ability to critically assess employee performance and to take fair and appropriate corrective action. Brough et al. (2013) proposed that leaders could leverage rewards and recognition as a means of influencing employee engagement. The senior OFSE leaders suggested that they needed to consistently hold people accountable for their work, which could result in either rewards or corrective actions. Saks (2006) suggested that distributive justice, leadership objectivity, and rewards and recognition are positively related to engagement. Likewise, researchers have found that leaders who positively influence organizational justice can offset lower levels of job security and encourage higher levels of employee performance (Wang et al., 2015).

Noncontextual Core Theme 4: Develop and communicate a unifying mission and goals. The senior OFSE leaders indicated that a unifying mission and goals positively influenced employee engagement. The leaders stressed that it was crucial to develop and communicate a

compelling mission and strategic goals and to gain buy-in from their direct reports and frontline employees to facilitate workforce engagement. Employee engagement is associated with the performance and success of business organizations (Griffin et al., 2015).

The senior leaders revealed that their firm's mission could positively influence employee engagement, collaboration, and performance. Kahn (1990) proposed that tasks that include clear goals increase job meaningfulness and engagement. Researchers have suggested that business leaders recognize that the engagement of their employees facilitates organizational goals (Gallup, 2017; Kahn, 1990). Researchers have also found that employee engagement is positively related to higher levels of employee commitment, productivity, customer satisfaction, and sales, which may result in improved organizational profitability (Gallup, 2017; Harter et al., 2002; Merry, 2013).

The senior OFSE leaders revealed that they sought buy-in and engagement from their leadership team, middle managers, and frontline supervisors in their quest to communicate the organization's mission and goals across the organization. Researchers have discovered that job resources valued by employees include the autonomy to develop solutions and that job resources increase employee engagement (Bakker & Demerouti, 2007). Therefore, employees who have the appropriate job resources, such as relevant information, are more likely to be motivated to engage (Bakker & Demerouti, 2007) and support the leader's mission and goals.

Noncontextual Core Theme 5: Organizational benefits of employee engagement.

Four noncontextual subthemes emerged from the phenomenological analysis that described the nature and organizational benefits of employee engagement. This core theme was developed through the synthesis of four subthemes: (a) performance focus, (b) enhanced organizational reputation, (c) innovations and process improvement, and (d) improved profitability. Whereas the previous four core themes illuminated the participants' experiences and insight into their

employee engagement leadership, this core theme emerged from their description of engaged employees.

Performance focus. The participants described employee engagement attributes such as higher levels of professional productivity and capacity, which resulted in more significant contributions to their organization. The participants indicated that engaged employees required lower maintenance and took the initiative to develop their professional skills faster than lessor engaged employees. Likewise, Shuck and Wollard (2010) characterized employee engagement as a process in which employees are motivated cognitively, emotionally, and behaviorally toward organizational performance and results.

The participants suggested that engaged employees were dedicated to their job and organization and were driven to perform well regardless of the task. Similarly, Schaufeli et al. (2002) defined employee engagement as a “positive, fulfilling, work-related state of mind that is characterized by vigor, dedication, and absorption” (p. 74). Jaupi and Llaci (2015) suggested that employee engagement is a sought-after condition that positively affects individual and organizational capabilities, employee commitment, involvement, and effort.

Enhanced organizational reputation. The participants shared positive consequences associated with higher levels of employee engagement, such as sharing positive references with outsiders. Moreover, the participants indicated that engaged employees are more likely to represent the company in a professional manner, which enhances their firm’s reputation with clients, suppliers, and the public. Similarly, Aon Hewitt (2015) suggested that attributes of engaged employees include a strong desire to be affiliated with the organization and to help the organization succeed through positive communication regarding the organization and personal determination and effort.

The senior OFSE leaders suggested that engaged employees were more likely than disengaged employees to facilitate the recruitment of employees and strong relationships with customers and suppliers. Likewise, researchers have suggested a positive relationship between employee engagement and higher levels of employee retention and client satisfaction (Gallup, 2017). The present study and previous research highlight the significance of employee engagement relative to positive organizational outcomes.

Innovations and process improvement. The participants indicated that engaged employees were more innovative than disengaged employees and were more likely to suggest process improvement ideas. Moreover, the participants proposed that engaged employees were better at problem-solving and developing useful and innovative concepts, which added to their firm's flexibility and resilience. Senior business leaders' responsibilities include encouraging employees to advance innovations and more effective processes (Griffin et al., 2015). Kaur (2017) found that employee engagement facilitates the use of cognitive skills to further the organization's goals. Similarly, the participants suggested that engaged employees assess situations, look for opportunities to improve performance, and respond to inefficiencies within their organization.

Improved profitability. The participants credited engaged employees with higher levels of financial profitability. They reported that the firm's profitability is a function of higher levels of service quality, which motivate client loyalty and reduce customers' price sensitivity. Additionally, engaged employees are more efficient, so they perform work at a faster pace, which lowers operating costs and increases profitability. Employee engagement also reduces the costs of employee turnover as employees are less likely to leave the organization.

Likewise, researchers have suggested that engagement is a condition in which employees are emotionally and psychologically involved in their work and organization (Khan, 1990) and

that engaged employees' performance will "propel their team and organization to improved crucial outcomes such as higher levels of productivity, safety, and quality" (Gallup, 2017, p. 41). Potential employee engagement outcomes are higher levels of performance at the individual and organizational levels (Aon Hewitt, 2015). Engaged employees can be a source of competitive advantage, as engagement can result in operational efficiencies, higher profitability, and ultimately higher shareholder returns (Maylett & Warner, 2014).

Contextual Core Themes and Subthemes

The core themes and subthemes that preceded this section were categorized as noncontextual or both contextual and noncontextual. During the qualitative phenomenological data analysis, new core themes and subthemes that were unique to the research phenomenon emerged: concurrently leading employee engagement and implementing retrenchment business strategies during a severe and protracted economic downturn.

Contextual Core Theme 1: Practice engagement leadership. Three unique contextual subthemes under the core theme of practice engagement leadership emerged during the qualitative phenomenological data analysis. The subthemes were (a) encourage employee participation, (b) keep employees informed, and (c) communicate the logic of retrenchment business strategies. Two subthemes—develop leader-employee relationships and emphasize the significance of employees' performance on organizational results—emerged in both the noncontextual and contextual data. A comparison of the noncontextual and contextual subthemes under the core theme of practice engagement leadership is presented in Figure 4. This schematic partially reveals how the economic recession and the execution of retrenchment business strategies interacted with engagement leadership.

Core Theme 1: Practice Engagement Leadership

Contrast Between Non-contextual and Contextual Sub-Themes

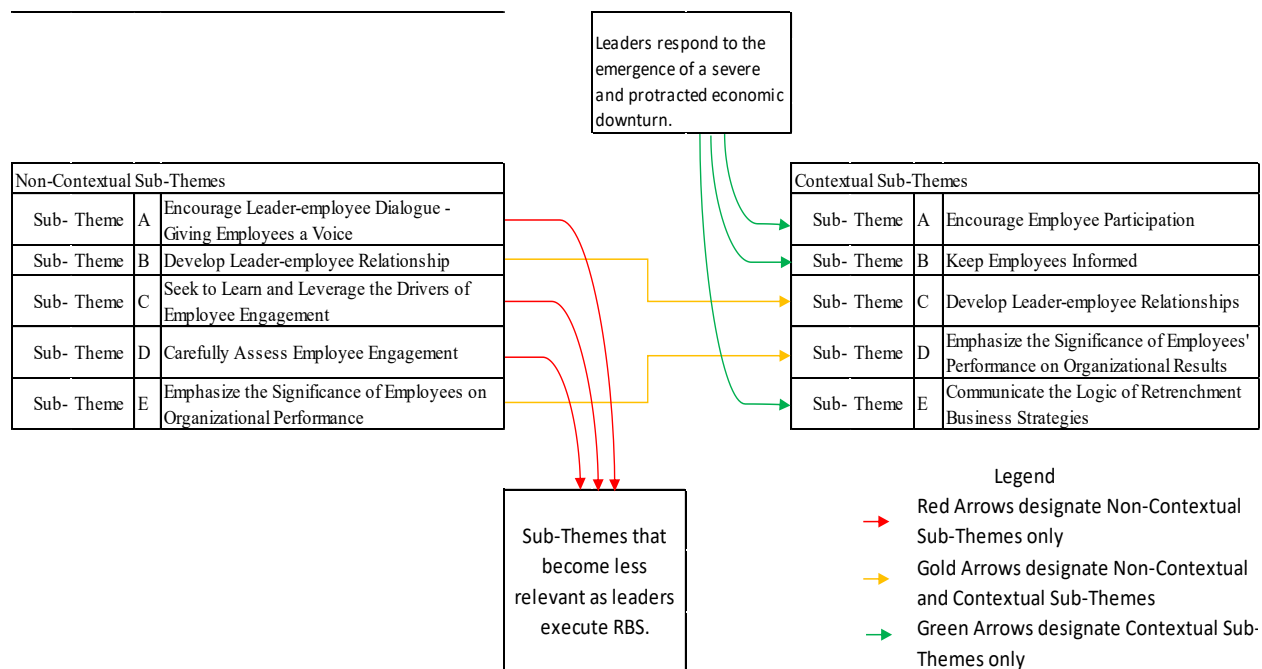


Figure 4. Core Theme 1: Practice engagement leadership.

Encourage employee participation. During the 2014–16 industry-wide economic contraction, the senior OFSE leaders encouraged employees to participate in adapting their firms to the adverse economic environment. The participants stressed that they fostered employee involvement in reducing operating costs and sustaining revenue. The phenomenological analysis revealed that during the recession, leaders transitioned from giving the employees a voice and listening to employees' opinions and ideas to empowering them to implement cost-saving initiatives within their realm of responsibility directly. Similarly, Bakker and Demerouti (2007) indicated that job resources such as participation in decision-making could lead to higher levels of employee engagement.

The participants indicated that they encouraged their employees to engage in organizational retrenchment and stressed that employees might have knowledge that is necessary to develop cost reduction solutions. Hornung et al. (2010) suggested that leaders who

encouraged employees to participate in decision-making could increase levels of employee engagement. Kahn (1990) asserted that employees need to be engaged before they are motivated to contribute beyond their job role.

Keep employees informed. The participants' responses indicated that timely information sharing is critical during periods of financial adversity. Bakker and Demerouti (2007) found that supportive job resources such as information sharing, and feedback could offset job demand inflation and enhance employee engagement. Likewise, the senior OFSE leaders suggested that their willingness to share relevant information with their employees was a precursor of employee engagement.

The participants found that employees experienced higher levels of job insecurity when their companies faced financial adversity, as well as during the execution of retrenchment business strategies, and that the leaders' communication was essential to maintaining employees' motivation to engage at work. Kowske et al. (2009) and Merry (2013) suggested that retrenchment business strategies are threatening to employees and erode workforce morale, which can motivate employees to disengage and seek other employment opportunities. Researchers have found that job resources such as information sharing could sustain employee engagement as job demands and uncertainty increase (Bakker & Demerouti, 2007; Schaufeli et al., 2006; Tiwari & Lenka, 2016).

Communicate the logic of retrenchment business strategies. While the senior OFSE leaders proactively sought to engage employees in problem-solving and decision-making, they also developed leader-driven retrenchment strategies unilaterally or with a limited number of key members of the leadership team. The participants indicated that it was crucial to explain the retrenchment business strategies to employees as a means of engaging the workforce. This subtheme highlighted the participants' perspectives regarding the significance of responding to

employees' concerns and anxiety and maintaining employee engagement by explaining their strategic rationale.

The participants sought to explain the rationale behind the retrenchment business strategies to engage their employees. The participants also tried to establish strategies that would ensure that decisions made across the organization were prioritized based on organizational objectives (Watkins, 2007). Fragouli and Ibidapo (2015) asserted that leaders are responsible for successfully managing stressful situations and communicating in a manner that positively influences and motivates their employees to engage in their work. Research findings have indicated that employees' satisfaction with organizational communication is positively related to engagement (Jaupi & Llaci, 2015).

Contextual Core Theme 2: Short-term imperatives. The leaders assessed the rapidly changing economic landscape and intervened to both ensure their firm's survival and retain as many key employees as practicable. Three contextual subthemes under this core theme emerged during the qualitative phenomenological data analysis: (a) gain situational awareness, (b) focus on short-term financial profitability, and (c) sense of urgency / establish organizational priorities.

Gain situational awareness. The participants continually assessed their external and internal environment to determine which available strategies would improve their firm's financial performance. The participants understood the necessity of evaluating the economic environment and developing solutions that effectively addressed the ultra-competitive environment that the industry contraction had created. Knight et al. (2017) posited that leaders could leverage employee engagement to improve their organization's competitiveness. Researchers have established that engaged employees are a competitive advantage in an increasingly demanding business environment (Bedarkar & Pandita, 2014; Macey & Schneider,

2008) and that employee engagement can lead to improved individual productivity and organizational profitability (Gallup, 2017; Harter et al., 2002; Merry, 2013).

The study participants also recognized the need to monitor the surviving employees' engagement and morale. While the severity of the 2014–16 industry contraction called for large-scale layoffs to offset a substantial drop in revenue and profitability (Deloitte, 2017), the decision to implement retrenchment business strategies such as downsizing could be demoralizing and stressful and could adversely affect employee engagement and firm capabilities (Kowske et al., 2009; Merry, 2013). Bakker and Demerouti (2007) discovered that actions that leaders take to limit job resources such as job security might undermine employee engagement. Furthermore, phenomenological analysis revealed a positive relationship between employees' awareness of their industry's and firm's financial adversity and their propensity to be distracted and disengaged. The participants suggested that it is prudent to monitor and take action to counter deterioration in employees' morale and engagement.

Focus on short-term financial profitability. The participants indicated that they were keenly focused on their firm's financial sustainability and survivability. The participants suggested that their short-term financial focus was vital to increasing the probability that their organization would survive the economic adversity. Notably, 33% of OFSE companies went out of business during the 2014–16 industry recession (Deloitte, 2017). The participants indicated that they faced economic uncertainty and that these environmental challenges motivated them to direct much of their attention to addressing significantly lower profitability. The senior leaders suggested that leaders who neglected their firms' short-term financial sustainability created a situation in which, ultimately, a larger number of employees lost their job. Additionally, the participants indicated that the proactive development and execution of retrenchment business strategies demonstrated their leadership competence and inspired the surviving employees to

engage. Researchers have found that employee confidence in senior leadership influences employee engagement (Dale Carnegie and Associates, 2014).

This economic downturn created a highly competitive environment in which business leaders developed and executed retrenchment business strategies to improve their firm's financial position and survivability (Deloitte, 2017). During the phenomenological analysis, it became clear that because participants were uncertain about the duration of the economic contraction, they were motivated to aggressively pursue retrenchment business strategies to lower their operating costs based on the supposition that the economic conditions would not improve in the near future. The senior OFSE leaders indicated that while retrenchment business strategies were necessary to offset their firms' lower revenues and profitability, the leaders also sought to engage the surviving employees in the tasks of improving organizational efficiency and productivity. Participants suggested that, on the one hand, they sought to minimize the recession's impact on their firm's financial results, and on the other hand, they understood the long-term benefits of keeping as many skilled and engaged employees as practicable. Researchers have found that engaged employees are a competitive advantage; therefore, engaging employees and retaining engaged employees is a leadership obligation (Griffin et al., 2015).

Interestingly, the participants indicated that they sought to reduce organizational costs in other areas as a means of retaining as many core employees as possible. Serrano and Reichard (2011) suggested that engaged employees can facilitate higher levels of productivity and customer loyalty, both of which are essential to offset a hypercompetitive environment. The economic downturn in demand for services and products created a hypercompetitive environment in which leaders were compelled to lower organizational costs to improve their firm's financial position and survivability (Deloitte, 2017).

Moreover, the participants linked short-term profitability with their encouragement of employees to be actively involved in cost reduction. Motivated to retain engaged employees, the participants sought to involve their employees in the development and execution of retrenchment business strategies. The short-term focus encouraged leaders and employees to critically examine and lower their firm's spending to avoid laying off a large number of employees later in the economic contraction. Researchers have found that retrenchment strategies are more financially beneficial if executed early in an economic downturn (Tangpong et al., 2015).

Leaders who focus on their organization's short-term profitability and execute retrenchment business strategies to help their firms survive a deep industry recession may negatively impact their workforce (Merry, 2013). In contrast, employee involvement in the planning and execution of reductions in force can result in higher levels of employee commitment (Martin et al., 1995). Researchers have stressed the organizational benefits of creating and maintaining workplace engagement (Krishnaveni & Monica, 2016; Kumar & Pansari, 2016). Slosberg et al. (2018) proposed that engaging employees in decision-making prior to and during organizational change could improve employee satisfaction and commitment. The participants stressed the need to engage employees in the tasks of lowering operating costs and executing retrenchment business strategies to minimize the number of employees impacted by reductions in force.

Sense of urgency: Establish organizational priorities. The dramatic downturn in industry activity gave the senior OFSE leaders a sense of urgency to prioritize their activities and the activities of the organization. The phenomenological analysis revealed that leaders sought to quickly develop and implement retrenchment business strategies; however, there was also a need to be thoughtful about how these strategies would impact the surviving employees and the firm's competitive capabilities. The participants indicated that while they recognized the dangers

imposed on their organization, their initial strategies and actions often were inadequate, which resulted in the execution of a series of retrenchment strategies. The senior OFSE leaders understood that engaged employees could be a source of competitive advantage and higher profitability (Maylett & Warner, 2014); however, the senior OFSE leaders suggested that they would have preferred to reduce their head count more aggressively so that the surviving employees would not have to experience ongoing job insecurity. Economic uncertainty can lead employees to be excessively concerned about their job security, which can adversely affect employee engagement (Bakker & Demerouti, 2007; Merry, 2013).

Contextual Core Theme 3: Establish leadership credibility. Three unique contextual subthemes under the core theme of establishing leadership credibility emerged during the qualitative phenomenological data analysis. The subthemes were (a) engage in thoughtful and trustworthy communication, (b) demonstrate leadership competencies, and (c) preserve organizational talent. The three subthemes revealed the participants' experiences and perspectives regarding the significance of their efforts to establishing their credibility with employees during an economic contraction.

There were no overlapping subthemes between the noncontextual and contextual core theme of establishing leadership credibility. A comparison of this core theme's noncontextual and contextual subthemes is presented in Figure 5. This schematic partially reveals how the economic recession and the execution of retrenchment business strategies interacted with engagement leadership.

Engage in thoughtful and trustworthy communication. The study participants linked open and honest communication about the company's financial situation and challenges with sustained employee engagement. Researchers have indicated that employee engagement and employees' satisfaction with organizational communication are positively related (Jaupi & Llaci,

Core Theme 3: Establish Leadership Credibility

Contrast Between Non-contextual and Contextual Sub-Themes

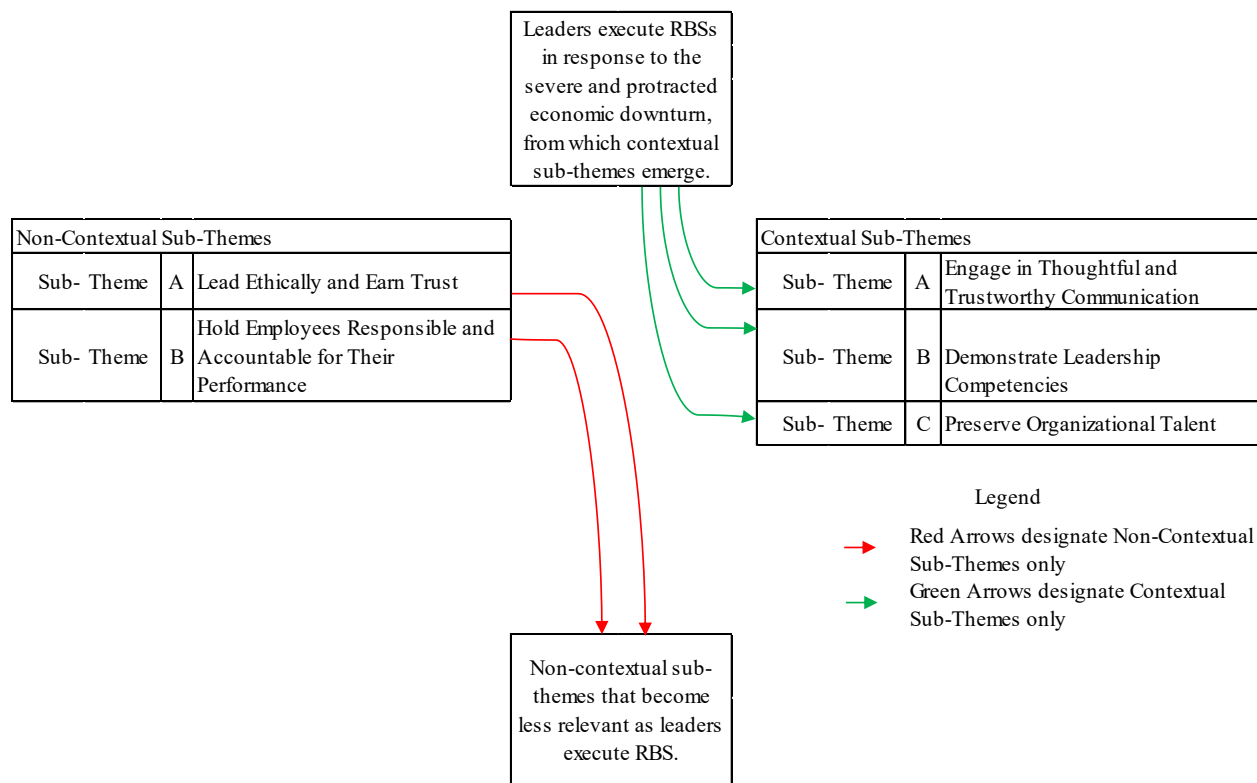


Figure 5. Core Theme 3: Establish leadership credibility.

2015). Moreover, Barclay and Barclay (2001) established that soft skills such as effective communication and empathy could lead to stronger leader-employee relationships, which could affect employees' motivation to engage at work.

Leadership attributes such as trustworthiness and open communication facilitate employees' psychological safety, which is a precursor of employee engagement (Kahn, 1990). In contrast, employees are more likely to disengage at work if they experience untrustworthy professional relationships (Gallup, 2017). Before engaging at work, employees assess their leaders' competence and trustworthiness and evaluate the cost and benefits of genuinely supporting the leaders (van Dierendonck et al., 2014).

This study's results revealed that senior leaders sought to lead with integrity and to provide employees with thoughtful and truthful information and that these leadership activities positively impacted employee engagement. According to Zhu and Akhtar (2014), follower-leader trust is a function of the leader's dependability and integrity. Likewise, Bakker and Demerouti (2007) found that the job resource of leadership communication is an influential driver of employee engagement as job demands increase.

Demonstrate leadership competencies. The findings of this study suggested that the senior leaders actively sought to demonstrate their competencies as a means of engaging their employees. Specifically, their actions were meant to be visible to the workforce so that the employees could see they were mitigating the risk of layoffs. The participants suggested that it was crucial that employees understood the senior leaders had experience in previous economic contractions and that employees were confident in their leaders' ability to successfully adapt the organization to the financial adversity. Similarly, Seijts and Crim (2006) found that leadership credibility and employee confidence in their leaders were antecedents of engagement.

The leaders demonstrated their contextual leadership competency by securing work from clients and reducing operating expenses. Shantz et al.'s (2016) findings indicated that relevant leadership and organizational assistance could encourage employees to engage at work. Likewise, leadership competencies can positively affect employee engagement (van Dierendonck et al., 2014). Employee confidence in senior leadership is positively related to employee engagement (Dale Carnegie and Associates, 2014).

In contrast, some of the senior leaders recognized that their actions could negatively impact their credibility with their employees, and they suggested that employees could view leaders' actions as unjust or inconsistent. In the same vein, Saks (2006) indicated that leaders' fairness toward employees could affect employee engagement levels. Therefore, employee

engagement antecedents such as organizational leadership and job resources affect employees' motivation to engage at work (Albrecht et al., 2015).

Preserve organizational talent. The senior OFSE leaders indicated that at the onset of the 2014–16 economic downturn they anticipated the need to execute reductions in force, but they also focused on retaining as many key employees as possible. The leaders demonstrated their willingness to lay off employees who were disengaged and marginal performers, and they found that this action could be engaging to the surviving employees. However, the goal of retaining organizational talent was difficult as more than 75% of oil and gas professionals were looking to exit the industry during the recession (Lee, 2017).

While employee engagement within the oil and gas industry can lead to higher levels of employee retention and employee retention is negatively related to workforce disengagement (Lee, 2017), preserving core employees during a significant downturn is difficult. The results of this study suggested that one employee retention tactic leaders should consider is utilizing highly skilled employees in lower-skilled roles. Although the lower-skilled tasks may not be as fulfilling to the employees, this tactic could be viewed as a form of leader recognition of valuable employees, and continued employment could be considered a reward or job resource, which could lead to higher levels of employee engagement (Brough et al., 2013).

The senior leaders and their leadership teams evaluated employees' performance and their importance to the business, working to keep the organization's core staff. The participants indicated that personnel evaluations should be thoroughly conducted to ensure that the organization retains the best employees and removes disengaged and unproductive employees from the organization. Although researchers have discovered that leaders should continuously monitor and evaluate their industry and the broader economy (Bolman & Deal, 2013) and should initiate organizational change to redirect their firm's activities based on emerging opportunities

and threats (Katz et al., 2016), there is a dearth of research that addresses the need for leaders to evaluate employees as part of employee engagement.

Contextual Core Theme 4: Nonproductive nature of employee disengagement. This cluster of subthemes spoke to the employee challenges leaders faced during the 2014–16 industry recession. Specifically, the results emphasized the interaction between retrenchment business strategies and the nonproductive nature of employee disengagement during an economic downturn. While retrenchment business strategies can increase organizational profitability, researchers have found that these strategies can result in increased job demands and higher levels of job insecurity for the surviving employees (McManus & Mosca, 2015). Kahn (1990) found that employee engagement is a function of work context and employee assessment of the present situation. Therefore, unfavorable work conditions associated with economic volatility and uncertainty may negatively influence both workforce engagement and organizational performance.

The participants indicated that the 2014–16 economic downturn and the implementation of retrenchment business strategies negatively affected their workforce. The results illuminated the relationship between organizational destabilization and employee disengagement. The core theme of the nonproductive nature of employee disengagement emerged from the following subthemes: (a) concerns and distractions lower engagement, (b) lower levels of employee morale and engagement, (c) unproductive interpersonal interactions, and (d) uncertainty and fear lead to inaction.

Concerns and distractions lower engagement. The senior leaders found that the economic downturn and the implementation of retrenchment business strategies were a distraction and a source of anxiety for employees, which adversely affected employee engagement. Moreover, employees experienced heightened job insecurity and invested

themselves in projecting possible future outcomes, which resulted in lower levels of engagement and productivity. Similarly, researchers have discovered that organizational change based on weak economic conditions and uncertainty may lead employees to focus on job security, which may adversely affect employee engagement (Bakker & Demerouti, 2007; Kowske et al., 2009; Merry, 2013).

Within the JD-R model, employees' perceptions of available job resources can be motivating and ultimately can increase employees' willingness to invest themselves in their work (Rich et al., 2010). Inversely, employees who question the availability of future job resources may be motivated to disengage at work. Employee engagement antecedents are a function of a firm's economic circumstances (Wang et al., 2015).

Lower levels of employee morale and engagement. Given the need to rapidly implement retrenchment strategies to offset lower demand for products and services, the senior OFSE leaders recognized that employees were concerned and that employee disengagement required their attention. The participants suggested that reductions in force, wage reductions, and reduced employee benefits distressed their workforce. The participants indicated that it was significantly more challenging to engage employees while implementing retrenchment business strategies.

The senior leaders also recognized that they needed to address lower levels of employee engagement and morale. Researchers have discovered that job uncertainty and downsizing are demoralizing and stressful and may adversely affect employee engagement (Kowske et al., 2009). The execution of retrenchment business strategies that reduce job resources and security or increase job demands may negatively affect employee engagement (Bakker & Demerouti, 2007). Although researchers have suggested that decreasing staffing levels and overhead costs are standard actions initially taken in response to an economic recession (Lowth et al., 2010), the

results of the present study suggested that these leader-driven actions could negatively affect engagement.

Unproductive interpersonal interactions. The industry recession and organizational retrenchment strategies resulted in higher levels of workforce stress, which could lead to unproductive interpersonal conflict. Participants indicated that stress could result in depression or anger or morph into unproductive, even violent, interpersonal interactions. The participants found that their retrenchment strategies produced employees who were angry and frustrated with leadership when productive coworkers were laid off and when job demands increased.

The JD-R model holds that job demands draw on an individual's physical and psychological resources, which results in lower levels of motivation, employee exhaustion, and disengagement (Schaufeli, 2015). Researchers have found a negative relationship between job demands and employee engagement (Bakker & Demerouti, 2007). Although the present study results aligned with the JD-R model, I went beyond the noncontextual JD-R employee engagement relationships to describe how job demands and resources interacted with the execution of retrenchment business strategies during a severe and protracted economic downturn and how this interacted with leading engagement. Additionally, I presented descriptions that suggested not only that job demands increase employees' levels of exhaustion and disengagement but also that employees' behaviors can become adversarial and even violent.

Uncertainty and fear lead to inaction. The participants recognized that employees felt vulnerable and were overwhelmed with the speed and severity of the market collapse and the iterative execution of retrenchment business strategies. As a result, some employees disengaged rather than engage in adapting their firm to the economic adversity. Participants suggested that there were situations in which employees did not want to accept the gravity of the situation, and their fear and doubt evolved into inaction and disengagement. Similarly, researchers have found

that disengagement attributes include distancing oneself from the performance of tasks and negative perceptions regarding a specific task or job content (Demerouti et al., 2001).

Wang et al. (2015) found that organizational leaders can affect their employees' perceptions of job security, which can affect workforce performance. Kahn (1990) suggested that psychological safety is a precondition for personal engagement. Leadership attributes such as competence, trustworthiness, supportiveness, and consistency foster employees' psychological safety.

Limitations

This qualitative phenomenological study had inherent limitations, which may affect the generalizability and trustworthiness of the results. First, the sample size of 10 participants limits the generalization of the results beyond the study's scope. Although data saturation was achieved, the relatively small sample size limits the generalization of the results. Second, the participants resided and worked in the United States, and more specifically the state of Texas, in one industry; therefore, the results may not be generalizable to other geographic regions or sectors. Moreover, because I collected empirical data exclusively from male leaders, I did not compare the interaction between male and female engagement leadership and the execution of retrenchment business strategies.

Fourth, although I practiced bracketing and reduction during data collection and analysis, my biases may have influenced the results and conclusions. The trustworthiness of the results is a function of the researcher's ability to search for unbiased meaning while collecting and analyzing the data (Moustakas, 1994). There remains the possibility that the data collection and analysis were biased, which could have unduly influenced the results. Although researcher bias is a concern of qualitative research, a systematic phenomenological research process can minimize the effect researcher bias has on the results and enhance the credibility and

trustworthiness of the findings. Scholars and organizational leaders should exercise caution before using broad generalizations to characterize and understand the interaction between leaders' implementation of retrenchment business strategies during a severe and protracted economic downturn and leaders' ability to engage their workforce.

Recommendations

Product and service demand volatility, formidable competitors, and shifting client demands can pose immense challenges to business leaders as they strive to create organizational value. Maylett and Warner (2014) indicated that engaged employees could be a source of competitive advantage, as engagement could result in operational efficiencies, higher profitability, and ultimately higher shareholder returns. While leaders need to engage their employees to gain a competitive advantage, the relationship between leadership and employee engagement has not been adequately studied (Carasco-Saul et al., 2015).

The results of the current study described the influence of context on employees' drivers of engagement and propensity to engage at work and how these employee factors interacted with senior leaders' ability to engage employees. The following recommendations for practical application and future research are based on the findings.

Recommendations for practical application. Given the increased levels of business volatility, a primary test of leadership is successfully adapting the workforce to meet environmental threats. Specifically, there is a need to understand how leaders' execution of retrenchment business strategies during economic contractions interacts with their ability to engage their workforce. The results of this study indicated that the leaders sought to balance the need to engage the surviving employees and concurrently implement retrenchment business strategies to adapt their firms to lower levels of revenue and profitability. The emergent contextual themes were the foundation of the recommendations for practical change. In addition,

comparisons between the noncontextual and contextual core themes and subthemes presented in Chapter 4 contributed to the recommendations for practical application.

Through the present study, I confirmed previous assertions that leaders could influence employees' motivation to engage at work (Blomme et al., 2015; Schaufeli et al., 2006; Xanthopoulou et al., 2009) and that engagement is impacted by employees' assessment of their environment or situation (Kahn, 1990). The results also indicated that the antecedents of engagement are not static but instead are dynamic in the sense that organizational context can significantly affect the relevance of engagement drivers. As presented in this study, changes in the economic environment can introduce new financial constraints that limit leaders' resource options and negatively influence employee engagement. The findings indicated that economic adversity may have motivated employees to disengage at work and that in this adverse economic context, leaders concurrently focused on their firm's financial viability, the importance of engaging the surviving employees, and changes in the drivers of employee engagement.

The implications of the present study's results included the following: (a) organizational leaders should recognize that they can impact employee engagement through the job resources they control and that these resources can be affected by economic factors; (b) like leaders, employees perform situational assessments, which may influence their drivers of engagement; and (c) as leaders adapt their organization to economic adversity, they should also adjust their engagement leadership practices to address the changing needs of employees to motivate them to remain engaged. One participant, George, emphasized the significance of these practical recommendations: "You need employees to be engaged now [during an economic contraction] more than ever." As a practical matter, these findings can be incorporated into leadership training courses within an OFSE firm to enhance engagement leadership knowledge and practice—and ultimately employee engagement and organizational performance.

Recommendations for future research. The OFSE industry and other industries are highly volatile. In this study, I presented contextual findings that may assist leaders as they retrench their firms during an industry economic contraction. This research could be replicated to explore how the execution of organizational growth strategies during a significant market expansion interacts with senior leaders' ability to engage their employees. This research concept would add to the employee engagement and leadership literature and provide leaders with a better understanding of how expansionary economic cycles and leading engagement interact.

The present qualitative phenomenological research was focused on a single industry in one U.S. state. OFSE firms specialize in developing innovative products and value-added services not found in sectors outside the oil and gas industry. Researchers could expand the present study to different industries and geographic regions to gain new insights and to extend the current knowledge regarding leading engagement during an economic recession. Moreover, quantitative research could be conducted to test the results of the present study. There exists a need for future quantitative research using a larger random sample size to produce results that are generalizable.

The analysis in the present study was primarily based on the interview transcripts. While the participants' demeanor during the interviews did not convey much information, most of the leaders showed some level of distress as they shared their insights regarding their experiences while implementing reductions in force. Whereas I collected minimal data concerning how leaders' mental state during the economic recession affected their ability to engage employees, researchers could design studies in the future to specifically investigate how leaders' mental state while developing and executing retrenchment business strategies interacts with their ability to engage employees.

Saks (2006) suggested that direct supervisors significantly influence employee engagement; therefore, the present research could be replicated with frontline supervisors to gain an understanding of how senior leader-driven retrenchment business strategies interact with frontline supervisors' ability to engage their teams. These recommendations could address an underinvestigated area of leading engagement research: the relationship between senior leaders' retrenchment business strategies and frontline supervisors' and the engagement of their direct reports. This research could produce useful scientific and practical knowledge that would advance understanding of the organizational dynamics that occur during an economic recession.

Although the JD-R model (Bakker & Demerouti, 2007; Schaufeli & Bakker, 2004) emphasizes the positive influence job resources have on engagement, it does not stress the need for leaders to individualize their engagement leadership approach. The present research suggested that engagement antecedents can be employee specific. Furthermore, the findings indicated that leaders are responsible for assessing employees' levels of engagement and determining and leveraging individualized drivers of engagement to motivate employees to engage at work. Research into the methods organizational leaders use to accomplish these leading engagement tasks could advance practical understanding that facilitates higher levels of employee engagement and performance.

The present study revealed that the senior leaders shifted from giving their employees a voice, which included evaluating and giving feedback on their ideas, to empowering employees to participate in the development and execution of tactics to reduce organizational costs. During the economic downturn, the participants' sense of urgency and their focus on short-term financial results motivated them to be more participative as leaders. Given that engaged employees can improve organizational competitiveness in an increasingly demanding business environment (Bedarkar & Pandita, 2014; Knight et al., 2017; Macey & Schneider, 2008) and increase

individual productivity and organizational profitability (Gallup, 2017; Harter et al., 2002; Merry, 2013), researchers in the future could investigate the difference between giving employees a voice (Ruck et al., 2017) and empowering employees to directly participate in developing and implementing tactical changes such as cost-saving initiatives.

Conclusions

In this study, I investigated senior OFSE leaders' perceptions of their engagement leadership during a severe and protracted downturn and the interaction between the implementation of retrenchment business strategies and their ability to engage employees. I developed the thematic framework through application of Colaizzi's (1978) phenomenological analysis process. The participants' insights into their lived experiences yielded rich qualitative data, and the phenomenological data analysis revealed emergent core themes and subthemes, which described and gave structure to the phenomenon. The results of the present phenomenological study corroborated the conceptual framework presented in Chapter 1, which suggested that an adverse economic context and the execution of retrenchment business strategies and the resultant changes in job resources and demands could influence leaders' ability to engage their employees.

The JD-R model holds that work resources and engagement are positively related (Schaufeli & Bakker, 2004) and that work demands and engagement are negatively related (Bakker & Demerouti, 2007). Kahn (1990) posited that employees' perspective regarding context could affect their motivation to engage. The results of the present study substantiated that economic context affected how senior leaders engaged their workforce and that relevant job resources could motivate employee engagement.

While scholars and practitioners have established employee engagement drivers (see Table 3 for a partial list of employee engagement antecedents) and organizational leaders have

access to these findings, high levels of employee engagement continue to elude business leaders in the United States and other countries (Gallup, 2018). Research findings have indicated that the antecedents of employee engagement are context specific, that context affects employee engagement levels (Kahn, 1990; Maslach et al., 2001), and that further contextual engagement studies are needed (Bakker et al., 2011; Jenkins & Delbridge, 2013; Saks & Gruman, 2014). Furthermore, researchers have not provided contextual intervention strategies, nor have they accounted for the constraints leaders might face during an economic contraction.

In the present study, I collected contextual and noncontextual data relative to leading engagement with the goal of understanding how the execution of leader-driven retrenchment business strategies during an economic recession interacts with leaders' ability to engage employees. The results indicated that although there may be commonalities in engagement antecedents across economic contexts, there are also situation-specific drivers of employee engagement and methods leaders use to motivate employee engagement.

I rigorously employed Colaizzi's (1978) process for phenomenological analysis of the qualitative data, and themes emerged from the analysis of the data to illuminate the study phenomenon. As planned, the study also revealed emergent themes outside the phenomenon, which enabled me to present not only significant contextual results but also a comparison between phenomenon-related and non-phenomenon-related results. In the present study, Figures 3, 4, and 5 illustrate how the execution of retrenchment business strategies interacted with leading employee engagement.

From the phenomenological analysis of the contextual data, four core themes emerged either independently or from the synthesis of 15 subthemes. The description and structure of the phenomenon and the contextual core themes and subthemes are presented in Table 10. Five core themes were developed from the 14 emergent subthemes during the phenomenological analysis

of the noncontextual data. Researchers have asserted that the effect leaders have on employee engagement has not been adequately investigated (Blomme et al., 2015; Schaufeli, 2015; Xanthopoulou et al., 2009). The results of the present study indicated that senior leaders could positively motivate their employees to engage in improving organizational outcomes and that leaders' approach to engaging employees changed significantly as they developed and executed retrenchment business strategies during the 2014–16 economic downturn.

The Phenomenon's Description and Fundamental Structure

Through the present phenomenological research, I sought to illuminate a contextual leadership phenomenon through the emergence of themes based on the participants' shared experiences and insights. Colaizzi's (1978) phenomenological approach suggested that a phenomenon's essences, based on the empirical findings, could further illuminate participants' perspectives regarding the study phenomenon. The following synthesis of the results includes distinct but interrelated essences that describe the fundamental structure of the study phenomenon.

First essence. Concurrently leading engagement or practicing engagement leadership and executing retrenchment business strategies during an economic recession creates organizational tensions. These organizational tensions affect employees' motivation to engage and influence what actions leaders take to engage their employees. Leading engagement while developing and executing retrenchment business strategies requires proactive and participative leadership. Leaders recognize that economic adversity is best addressed when employees engage in improving individual and team performance. In this context, leaders are motivated to strengthen leader-employee relationships and to inform, empower, and engage their employees.

Paradoxically, in an adverse economic environment, leaders become more reliant on their employees, and employees become more reliant on their leader. Information becomes more

important to employees, and leaders are more focused on sharing useful information such as industry activity trends, organizational performance, and strategic plans. Leadership communication is used to emphasize the need for action, the significance of employees' engagement, and the leader's credibility in order to motivate employees to engage in activities that will improve their firm's financial results. The leader-employee communication cycle is compressed as the leader and employees collaborate to develop accretive solutions during the economic contraction.

Second essence. Business leaders and employees assess their economic environment and understand that industry recessions drive leaders to adapt their firms to lower levels of activity and revenue. Leaders and employees alike know the probable consequences of a significant economic downturn. Leaders' fiduciary responsibilities motivate them to continuously improve their firm's financial performance. Although leaders' financial responsibilities remain constant across economic environments, an industry-wide recession affects their objectives. When faced with severe financial adversity, leaders focus on lowering costs to offset lower revenue.

Business leaders have a strong desire to engage their workforce in improving financial performance. Although leading engagement is crucial across economic environments, during an economic downturn, leaders seek to establish organizational priorities around sustaining short-term profitability. The leaders have a sense of urgency to promote employee engagement and employee-driven cost-cutting initiatives.

Third essence. Leaders understand that employees assess how they respond to economic adversity and that employees are more likely to remain engaged if their leaders exhibit credible leadership. Trustworthy leadership and communication are foundational to leading engagement during an economic recession. The leaders' ability to positively affect organizational resources and outcomes motivates employees to engage at work even when the employees face higher

levels of uncertainty and job insecurity. Leadership credibility is essential to counter the detrimental impact economic adversity and retrenchment business strategies have on employee engagement. Employees' heightened concerns and distractions can result in employee disengagement, interpersonal conflict, fear, and inaction. Given the unproductive nature of these employee responses to organizational uncertainty, employees' confidence, respect, and trust in their leaders are crucial drivers of employee engagement.

Summary

The purpose of this empirical phenomenological study was to explore the lived experiences of senior leaders at U.S. OFSE companies in a highly challenging economic environment. Specifically, I investigated the interaction between leader-driven retrenchment business strategies and senior OFSE leaders' perceptions of their ability to engage their workforce. Given this aim, I used empirical phenomenological research to examine the lived experiences of senior leaders with respect to a specific phenomenon: a highly challenging economic environment.

Through the present research, I presented coherent and realistic descriptions of the noncontextual and contextual core themes and subthemes. The descriptions and structures of the participants' experiences were based on a reflective analysis (Moustakas, 1994), and I presented my interpretation of the findings in relation to the literature. Given the magnitude of the data collected in this research and the results developed from the data through rigorous systematic phenomenological analysis, I found the influence of financial adversity and leader-driven retrenchment business strategies on leading engagement was significant.

To recap, my ultimate goal was to develop practical knowledge that enhances engagement leadership practices and workforce engagement while executing necessary retrenchment business strategies. I sought, in the words of Moustakas (1994), "a return to

experience in order to obtain comprehensive descriptions that provide the basis for a reflective structural analysis that portrays the essences of the experience” (p. 13). Through this study, I achieved my purpose and goals. It is with humility that I present this research and with sincerity that I share this scientific and practical knowledge, which is meant to enhance engagement leadership practices and workforce engagement during periods of economic decline.

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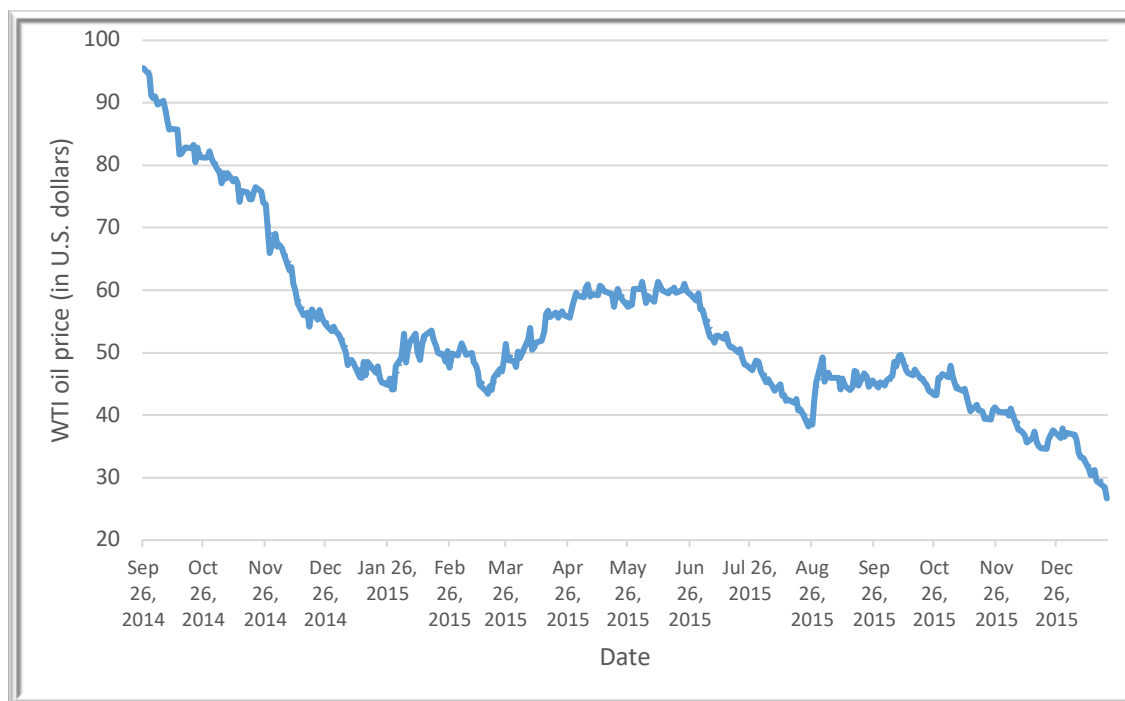
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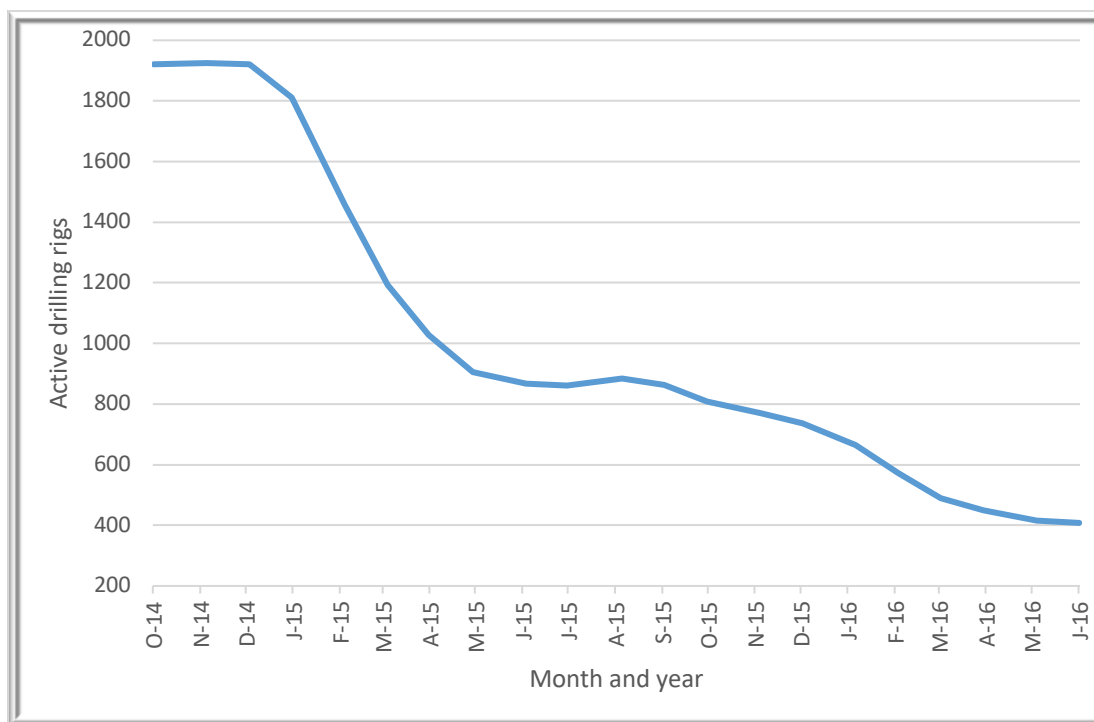
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Appendix A: West Texas Intermediate Oil Price, 2014–15



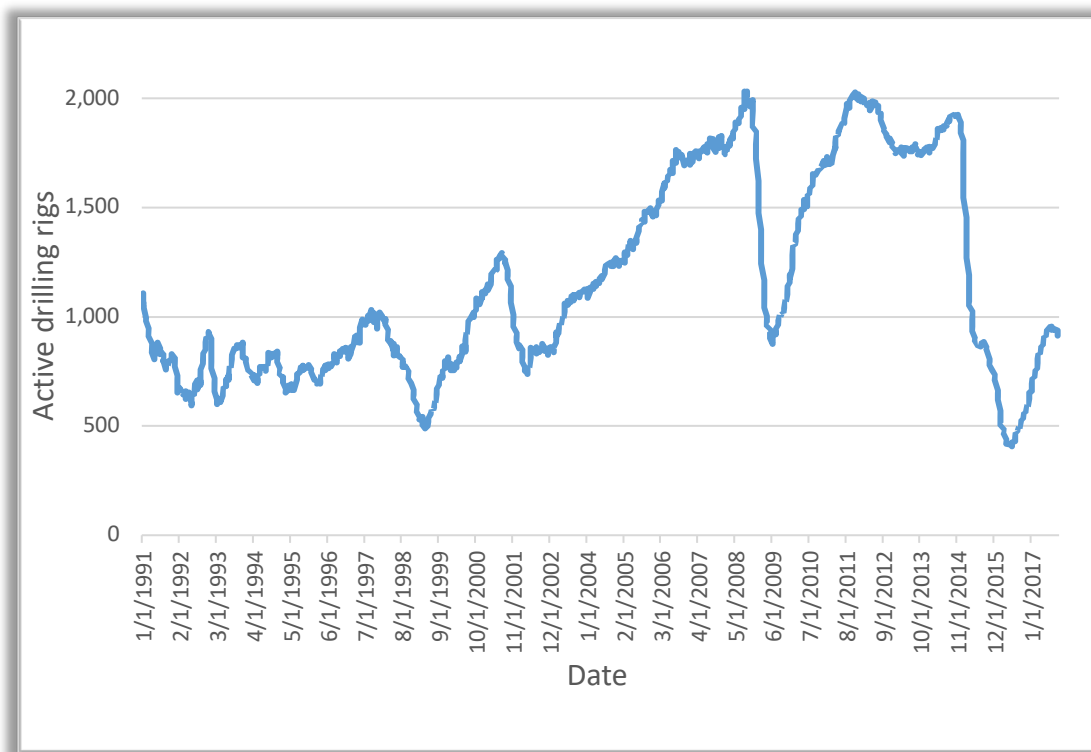
Note. Chart created based on data from NASDAQ (n.d.).

Appendix B: U.S. Drilling Rig Count, 2014–16



Note. Chart created based on data from BakerHughes (2017).

Appendix C: U.S. Drilling Rig Count, 1991 to 2017



Note. Chart created based on data from BakerHughes (2017).

Appendix D: Soliciting/Recruiting Script

The following introductory script, subject to ACU's IRB approval, was used during face-to-face meetings and in emails with potential study participants.

Greetings Name of Potential Participant,

My name is Larry Hill. I am a doctoral candidate at Abilene Christian University. I am conducting research on engagement leadership during the 2014–16 economic downturn in the oil field services and equipment (OFSE) industry. Now it is time for me to collect data for my dissertation by conducting interviews with senior OFSE leaders who were responsible for their workforce's engagement and for developing and implementing retrenchment business strategies in reaction to the latest industry recession.

I am inviting you to participate because as a senior OFSE leader, you meet the study's criteria. The study is titled "The Convergence of Engagement Leadership and Leader-Driven Retrenchment Business Strategies: A Phenomenological Approach." The purpose of this qualitative study is to explore the experiences and perspectives of U.S. OFSE leaders regarding how they engaged employees and how their execution of retrenchment business strategies during a severe and protracted industry recession interacted with their ability to engage their employees. Given the purpose of this research study, your past experiences and insights as a senior OFSE leader will be valuable.

Participation in this research includes 1 to 3 interviews with the researcher, Larry Hill. Each interview will take approximately 45–60 minutes, and the interview questions will focus on your experiences regarding the relationship between the development and execution of retrenchment business strategies and your ability to engage employees. During the interviews,

you will be asked questions, in response to which you will describe your thoughts and experiences.

As a study participant, you may experience a minimal amount of risk. I will cover these risks with you before our first interview. Your participation in this study is purely voluntary. If you decide to participate in this study, you will be asked to sign an informed consent document prior to our face-to-face interviews. If you decide to participate in this research study, you may withdraw at any time. If you choose to drop out of the study, the researcher will respect your decision, and any data that you have provided will be removed from the study. Furthermore, if you decide not to take part in this study, your decision will be kept confidential.

As a means of mitigating risks to you, the interviews will be conducted in a location that will protect your confidentiality and privacy. Your identity and your organization's identity will not be revealed. Your responses will be recorded using a digital audio recorder, and the interview will be transcribed into text. The interview transcript will be kept on my password-protected computer, and hard copies will be stored in a secure location with access control for 3 years after the approval of the dissertation to protect your privacy and confidentiality.

Please be aware that before we start the interview process, you will receive a consent form, which includes information regarding the study's purpose, the risks and benefits of participation in the study, and the steps that will be used to protect your confidentiality and privacy. If you voluntarily choose to participate in this research study, you must sign the consent form.

Based on your meeting the study's inclusion selection requirements and your interest in participating in this study, I will follow up with you to schedule an interview. The interviews will be conducted at 4711 Gessner Road, Houston, Texas, 77040.

If you have any questions or would like to participate in the research, I may be reached at

██████████ or ██████████.

Thank you for your consideration,

Larry M. Hill

Appendix E: Research Background and Interview Questions

Dear Prospective Participant,

As part of my ethical responsibilities as a researcher, I must provide you with information regarding the nature and significance of the present study. The following information is meant to describe the research purpose. I have also provided characteristics of employee engagement and its benefits and a list of potential retrenchment business strategies. Please let me know if you have any questions after reading the following information.

Background of the Research

The present research seeks to gain insight from senior OFSE leaders to understand the relationship between leader-driven retrenchment strategies and leading engagement during a significant economic downturn. To ensure all study participants understand the characteristics of employee engagement, I have provided some empirically tested characteristics and benefits of engagement. While I will not go into the details of retrenchment business strategies, you will be able to appreciate that the strategy includes reductions-in-force, pay cuts, reducing or eliminating specific employee benefits, tighter financial controls, and cuts to capital spending.

Business leaders who engage employees may positively influence individual performance and organizational outcomes. Schaufeli and colleagues characterized engagement as “a persistent, positive affective-motivational state of fulfillment in employees that is characterized by vigor, dedication, and absorption” (as cited by Maslach et al., 2001, p. 417).

Vigor refers to high levels of energy and resilience, the willingness to invest effort in one’s job, the ability to not be easily fatigued, and persistence in the face of difficulties. Dedication refers to a strong involvement in one’s work, accompanied by feelings of enthusiasm and significance, and by a sense of pride and inspiration. Finally, absorption refers to a pleasant state of total immersion in one’s work, which is characterized by time

passing quickly and being unable to detach oneself from the job. (Maslach et al., 2001, p. 417)

May et al. (2004) asserted that employees want to express themselves in their work, and are motivated to invest cognitively, emotionally, and physically in their work. Researchers have emphasized the constructive relationship between work performance and outcomes based on engaged employees who commit cognitively, emotionally, and physically to their work tasks (Christian, Garza, & Slaughter, 2011; Kahn, 1990; Rich, LePine, & Crawford, 2010).

Researchers have posited that employees can be a competitive advantage; therefore, the engagement of employees is a leadership imperative (Griffin, Bryant, & Koerber, 2015). As such, employee engagement has been a focus of practitioners and scholars since the turn of the 21st century (Saks & Gruman, 2014). Researchers' findings suggested that there is a positive relationship between employee engagement and higher-levels of individual and organizational performance, employee retention, customer satisfaction and profitability (Gallup, 2017; Merry, 2013; Thompson, Lemmon, & Walter, 2015). Likewise, past research findings indicated that firm productivity and value is positively related to engaged employees; whereas, disengaged or partially engaged employees are less productive (Christian et al., 2011; Gallup, 2017; Aon Hewitt, 2015). Recognizing the practical benefits of employee engagement motivates business leaders to be interested in the conditions that encourage employees to engage in their work; however, the relationship between leadership and employee engagement continues to be understudied (Carasco-Saul, Kim, & Kim, 2015; Schaufeli, 2015).

Interview Questions

Within the context of the latest OFSE industry recession, the following four interview research questions will be used to generate qualitative data from senior OFSE leaders.

Q1. What are your professional experiences regarding leading employee engagement?

Q2. How did your leadership approach change (if any) during the 2014 to 2016 OFSE industry recession? What further insights did you gain from leading employee engagement in this adverse economic context?

Q3. Did the execution of retrenchment strategies at your organization affect your ability to engage your employees? If so, how?

Q4. What insights did you gain from observing employee engagement behavioral responses to the communication and execution of retrenchment business strategies?

Appendix F: Informed Consent

Introduction: The Convergence of Engagement Leadership and Leader-Driven
Retrenchment Business Strategies: A Phenomenological Approach

INTRODUCTION: Larry Hill is a student in Abilene Christian University's organizational leadership doctoral program. The doctoral program requirements include conducting research based on a significant problem of practice or organizational problem. This qualitative research study calls for interviewing participants as the primary means of collecting data. The interview process is meant to uncover relevant and important information concerning the relationship between organizational leadership during a severe economic downturn and employee engagement. Specifically, the interviews seek information regarding the relationship between leader-driven retrenchment business practices and employee engagement.

You may be eligible to take part in a research study. This form provides essential information about the study, including the risks and benefits to you, the participant. Please read this form carefully and ask any questions that you may have regarding the procedures, your involvement, and any risks or benefits you may experience. You may also wish to discuss your participation with other people, such as professional colleagues or family members.

PURPOSE AND DESCRIPTION: The purpose of this qualitative research study is to explore the experiences and perspectives of oilfield services and equipment (OFSE) senior leaders regarding how their execution of retrenchment business strategies during a severe and protracted industry recession potentially impacted employee engagement. Given the volatile nature of the OFSE industry and the importance of employee engagement, the researcher will gather and analyze data to potentially improve contextual understanding of the leader-employee engagement relationship.

If selected for participation, you will be asked to attend 1 to 3 interviews with the researcher, Larry Hill. Each interview is expected to take approximately 45–60 minutes. During these interviews, you will be asked to participate in the following procedures: an interview that consists of open-ended questions to gather information relevant to the research purpose. As a senior leader at an OFSE firm, the research will benefit from your description of your lived experiences during the latest industry recession. The interview will only commence with your expressed permission indicated by signing this form. Participation in this research study is voluntary.

The study interviews will be recorded and transcribed. Additionally, the researcher will be collecting descriptive information from each participant. Only the researcher will have access to any materials (recordings and notes) resulting from the interviews. These documents will be kept in a locked file drawer or in password-protected files on the researcher's laptop. No personally identifying information will be shared.

RISKS & BENEFITS: There are some minimal risks to taking part in this research study. Below is a list of the potential risks, including the seriousness of those risks and how likely they are to occur:

Except for minimal risks associated with traveling to a predetermined interview site, there are practically no physical risks associated with being a study participant.

Social risks could include, although unlikely, the potential for changes in social relationships and adverse consequences related to these changes. If a participant's responses to the interview questions were to become known to others, others' interpretation of the participant's responses would not cause the participant to lose the respect of others or experience negative social consequences. Therefore, the participant's social risk is both unlikely and not serious.

Psychological risks may include participants experiencing anxiety before and during the interview. Furthermore, recalling challenging experiences that occurred during an economic downturn and that demanded action that adversely affected others may lead to feelings of guilt or regret. Given the psychological demands routinely experienced by senior leaders in the oilfield services and equipment industry, psychological risks are unlikely and should not be serious.

Legal risks may exist when participants reveal, during the interview, that they have engaged in acts in which they are criminally or civilly liable. Considering the context of this research, legal risk is not serious and is unlikely.

Economic risks include loss or diminished income or financial costs. It is unlikely that the participant's responses, if made public, would negatively affect the participant's present job and future employability. Therefore, there are no serious economic risks to the study participants.

There are potential benefits to participating in this study. Such benefits may include contributing in a meaningful way to a highly cyclical industry in which leaders develop and implement retrenchment business strategies to improve their firm's financial results, and at the same time strive to engage their employees. While others may also benefit from the researcher's findings, your awareness of the study gives you the first opportunity to learn from the study. The researcher cannot guarantee that you will experience any personal benefits from participating in this study.

There is no compensation associated with this study. Your participation is strictly voluntary.

PRIVACY & CONFIDENTIALITY: Information collected about you will be handled in a confidential manner in accordance with the law. Some identifiable data may have to be shared with individuals outside of the investigator, such as members of the ACU Institutional Review Board. Aside from these required disclosures, your confidentiality will be protected by employing security mechanisms, aliases, and coding to conceal the interviewee's responses. I will use a cross-reference spreadsheet that links your name to a nonrevealing alpha-numeric code, and

this cross-reference spreadsheet will be stored on a password-protected computer. Physical documents derived from your interview will be kept in a lockbox and electronic documents will be stored in the researcher's password-protected computer for a period of 3 years after the study is approved. No personally identifying information will be shared. Furthermore, I will use an alias for each participant, and no references to any participant's identity will be disclosed.

I have completed the Protecting Human Research Participants training as required by Abilene Christian University's Internal Review Board, which emphasized the importance of ensuring that the participants are protected from personal, social, and professional harm. Although the data that I will be gathering are benign, I will diligently work to protect the participants' confidentiality and privacy and to do no harm to the participants.

CONTACTS: If you have questions about the research study, the principal investigator is Larry Hill, doctoral student at Abilene Christian University, and may be contacted at 21610 Firemist Way, Cypress, Texas, 77433 or by phone at [REDACTED]. If you are unable to reach the principal investigator or wish to speak to someone other than the principal investigator, you may contact Dr. Richard Dool, dissertation chair, at [REDACTED]. Dr. Dool graduated with a doctor of management from the University of Maryland. If you have concerns about this study, believe you may have been injured because of this study, or have general questions about your rights as a research participant, you may contact ACU's chair of the Institutional Review Board and executive director of research Megan Roth, PhD. Dr. Roth may be reached at [REDACTED]

Your participation in this research is entirely voluntary. You may decline to participate or withdraw from the study at any time and for any reason without any penalty or loss of benefits to which you are otherwise entitled.

Additional Information

I recognize the importance of your time, and as such, I am committed to conducting meaningful research and protecting your confidentiality. The answers you provide, as well as the answers provided by other participants, will be used in this research. During the interview, please feel free to ask any questions and know that you may decline to answer questions. Please note that there is no compensation for participation in this study or for participant injury.

While the data analysis will ultimately influence the number of participants, the planned sample size of this qualitative research is 10 participants.

Consent Signature Section

Please sign this form if you voluntarily agree to participate in this study. Sign only after you have read all of the information provided, and your questions have been answered to your satisfaction. You should receive a copy of this signed consent form. You do not waive any legal rights by signing this form.

Printed Name of Participant

Signature of Participant

Date

Printed Name of Person Obtaining

Signature of Person Obtaining

Date

Appendix G: IRB Approval

ABILENE CHRISTIAN UNIVERSITY
Educating Students for Christian Service and Leadership Throughout the World

Office of Research and Sponsored Programs
320 Hardin Administration Building, ACU Box 29103, Abilene, Texas 79699-9103



August 17, 2018

Larry Hill

Department of Education

ACU Box 29140

Dear Larry,

On behalf of the Institutional Review Board, I am pleased to inform you that your project titled "The Convergence of Engagement Leadership and Leader-driven Retrenchment Business Strategies: A Phenomenological Approach"

(IRB# 18-056) is exempt from review under Federal Policy for the Protection of Human Subjects.

If at any time the details of this project change, please resubmit to the IRB so the committee can determine whether or not the exempt status is still applicable.

I wish you well with your work.

Sincerely,

Megan Roth

Megan Roth, Ph.D.
Director of Research and Sponsored Programs