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Balancing Focal and Client Firm Employee Identification and Acculturation Tensions: A Case Study Approach at a BPO Firm

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Balancing Focal and Client Firm Employee Identification and Acculturation Tensions:

A Case Study Approach at a BPO Firm

By

Jonna Broscious Blount

A Dissertation Submitted in Partial Fulfillment of the Requirements for the Degree

Of

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ACCEPTANCE

This dissertation was prepared under the direction of the JONNA BROSCIOUS BLOUNT Dissertation Committee. It has been approved and accepted by all members of that committee, and it has been accepted in partial fulfillment of the requirements for the degree of Doctor of Philosophy in Business Administration in the J. Mack Robinson College of Business of Georgia State University.

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It always seems impossible until it's done. – Nelson Mandela

I entered the DBA program aware that I was about to embark on an arduous and exciting journey that would lead to a wonderful yet entirely unknown destination. I arrived at my first residency in August of 2018, anticipating the three years that lay before me filled with trepidation and excitement. The journey has not disappointed; it has exceeded my expectations in every way. Not only did I learn from some great professors who possess unmatched intellect combined with an uncanny ability to teach in a way that leaves students craving more, but I was surrounded by a cohort of classmates who were as engaged, curious, and hungry to learn and grow as I was.

Classmates quickly became trusted confidants, study mates, and friends as we strategized how we would complete our research while balancing families, work, and social lives. We struggled, and we supported one another. We lost classmates. Two passed from this earth before they could complete the journey. We carried their memory along with us on our collective journey. We laughed, we vented, we worked hard, and we prevailed.

This journey was so much more than attending classes and conducting research. It was a journey to test our meddle, to strive to reach the pinnacle of academic achievement, to prove we could do it. This experience taught me to think differently and see and solve problems through various new, previously unexplored lenses. It was not a program to complete but rather a transformation to experience.

My doctoral committee supported me in every way. They gently guided me as I made my way through new and unfamiliar paths that can only be truly transformative if fully experienced. Some days felt like monumental successes, others like utter failures. I am forever grateful for both. To my advisor and my committee, you have given me a gift for which I can never re-pay.

I would like to thank my advisor, Dr. Denish Shah, for all the guidance and lengthy phone sessions as I wrestled through clarifying my topic, identifying my research setting, examining and applying theory, and gaining knowledge on methods. It required much patience, but the strong foundation I received will aid me as I move forward into a lifetime of research and continued quest for learning.

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I am blessed to have had family and friends encouraging and cheering me along on this journey. I am incredibly thankful to my children, Darby and Grayson, for continually pumping me up and assuring me that I was up for the challenge. I also thank my parents for raising me to be curious, praying for me unceasingly, and encouraging me when I wrestled with self-doubts. Their belief in me, along with others I have not explicitly mentioned, propelled me forward a step per day toward this goal. Thank you seems inadequate for all that has meant to me over the past three years.

Last, I am grateful to God for all the gifts that he has bestowed upon me. He has given me an insatiable curiosity to learn, and I pray that the skills and abilities I have gained through this journey can be used in His service and for His glory.

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LIST OF ABBREVIATIONS

Abbreviation	Definition
BPO	Business Process Outsourcing
OC	Organizational Culture
OIT	Organizational Identity Theory
OCT	Organizational Control Theory

ABSTRACT

Balancing Focal and Client Firm Employee Identification and Acculturation Tensions:
A Case Study Approach at a BPO Firm

By

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Research in the organizational behavior and identification domains includes numerous studies examining how employees identify and acculturate with their employing firm. However, a dearth of research exists examining the identification and acculturation process for firms that employ individuals who support a client firm full-time for an extended period. This case study seeks to discover the identification and acculturation process of a Business Process Outsourcing (BPO) firm operating with this model. The research seeks to learn how the focal firm balances the tension of acculturating its employees while preparing and equipping them with the processes, procedures, and necessary cultural elements of the client firm they support to deliver the highest quality of service possible to the client. The research examines the actions taken by leadership to foster acculturation and the experiences and barriers of the focal firm employees which strengthen or weaken the process. Additionally, it considers the inputs of the client in the identification and acculturation process.

Through qualitative investigation, the research explores how focal firm leaders seek to acculturate employees and how and why employees embrace and embody the focal firm's culture. Empirical evidence was gathered through semi-structured interviews conducted with tenured and new individuals, including senior leaders, middle-level leaders, and employees. This evidence was supplemented with secondary data sources to provide insight into the focal firm culture. Five themes emerged from the empirical evidence as significant: Firm Culture, Leader Characteristics, Leadership Actions, Employee Responses, and other Identification and Acculturation Factors, including Employee Barriers and Client Inputs. Findings showed that a strong firm culture and leadership buy-in was paramount to the identification and acculturation process, and five specific leadership actions drove employee identification and acculturation with the focal firm. Findings also showed that employee experiences and barriers and client inputs moderated the acculturation process. As a result of the findings, contributions have been made to both theory and practice. A contribution has been made to theory by offering a detailed empirical account of how a BPO firm acculturates employees with the focal firm while balancing the tensions of client culture. Empirical findings led to the development of propositions and a conceptual framework that added to the academic literature in the organizational identity and employee acculturation domains. Additionally, the findings contributed to the creation of a Firm Identity Continuum to gauge the state of employees. As a contribution to practice, the study offers recommendations for how practitioners can aid the identification and acculturation process by applying the conceptual framework and using the Firm Identity Continuum to evaluate employees who work for one firm but support another full-time. Guidance is offered for achieving the appropriate balance of identification and acculturation for the focal firm.

Keywords: Employee acculturation, Organizational Identification, Business Process Outsourcing firms, BPO, Employee Identification, and Acculturation Process

I INTRODUCTION

Building a strong culture with values with which individuals can identify helps firms attract and retain employees, leading to better business outcomes. When employees hold values similar to those of their firm, they experience beneficial outcomes, such as greater job satisfaction, increased organizational commitment, and higher intent to stay in the organization (Ryu, 2015). Research in the organizational behavior and identification domains indicates that when employees identify with an organization, they are more likely to acculturate. Identification provides benefits to the organization by increasing members' long-term commitment and support for the organization (Elsbach & Bhattacharya, 2001).

Organizational culture has been widely studied by sociologists, anthropologists, and others in the social science fields for decades, and it remains a relevant topic in all sectors of the business world today. Culture represents the values, beliefs, and assumptions shared or communicated among members, and organizational culture serves to guide behavior and facilitate shared meaning (Nazarian, Atkinson, & Foroudi, 2017). Research has examined the link between organizational culture and organizational performance and has deemed strong organizational culture to be an essential resource that organizations use to maintain their competitive advantage (Nazarian et al., 2017; Sinclair & Sinclair, 2009).

Examining and understanding how individuals acculturate with their employing firm is beneficial for employers. Acculturation in the business sense refers to the socialization process employees go through to learn, adjust to, and internalize their firm's culture. When a firm has a strong culture and employees are "bought-in," they tend to embrace and embody the culture and seek to identify with it. To *embrace* something is to support it willingly and enthusiastically, and to *embody* something is to represent it in a clear and obvious way. While embracing and embodying a firm's culture is not a requirement for an employee to do a job adequately, it benefits both the employee and the firm when there is strong identification. An important distinction is that identification is based on a person's self-perception rather than the person's perception of the organization (Elsbach & Bhattacharya, 2001). Organizational membership provides a place for employees to reinforce their preferences of who they are as individuals, and individuals often either commit to (identify) or disengage (disidentify) with a group that does not embody characteristics they see as congruent with their own (Ryu, 2015). When individuals identify with their organization, it can be said there is an organizational commitment or a "psychological attachment" (Ryu, 2015).

I.1 Summary of Problem

This research examines employee identification and acculturation in the context of a Business Process Outsourcing (BPO) firm where employees support a single client firm in a customer service capacity, full-time, for an extended period. It examines how the firm attempts to balance the tension of acculturating employees with its firm, the "focal" firm, while equipping employees with the needed processes, procedures, and cultural elements of the client firm to deliver the highest quality of service to the client. In this context, because each employee represents only one client for an extended period, there is a risk that employees could experience identity confusion. Extant research indicates that increased contact leads to greater salience of the shared values between the organization and the person, and therefore, to identification (Bhattacharya & Sen, 2003). By supporting a single client full-time for an extended period, employees are immersed in the client firm and culture daily. Subsequently, the employee could begin to identify and acculturate more closely with the client firm they support than with the focal firm. This could result in complications for the focal firm and identification ambiguity for employees. Risks to the focal firm include employees seeking work directly with the client they support, employee attrition to other firms or industries, or unengaged, unmotivated employees who remain with the firm but who offer service only to the extent that it benefits them (S. G. Scott & Lane, 2000). The expenses associated with attracting, recruiting, and training new employees are significant and a concern for every modern firm. High attrition or primary identification with the client firm creates a barrier to building a strong and distinctive organizational culture for the focal firm, which is shown to provide a competitive advantage (Nazarian et al., 2017; Sinclair & Sinclair, 2009). The challenge that faces the focal firm is that in order to deliver the highest quality of service to the client firms, each employee must be well trained in the processes, procedures, and necessary cultural elements of the client firm to the extent that it equips the employee to provide first-class service to that firm. Clients desire and demand this from the BPO firm from which they are securing services, and this is often a part of the sales pitch to entice new clients. Simultaneously, the focal firm strives to create an environment which encourages employees to acculturate with the focal firm. In this context, the goal for the focal firm is to prepare its employees to serve and represent the client while ensuring employees associate their primary employment identity with the focal firm. For a firm that strives to leverage its organizational culture as a competitive advantage, achieving a state of balance where employees fully embrace and embody the focal firm's culture while delivering outstanding service to clients is a challenge, and the process for doing so has not been codified.

I.2 Research Purpose

The purpose of this research is to examine how firms acculturate employees who work for the focal firm but who support a single client firm full-time for an extended period. The study seeks to understand how the focal firm culture is communicated and socialized to the employees in a way that causes them to embrace and embody the culture and to identify with the focal firm. It investigates how and why employees identify and subsequently acculturate with the focal firm when they spend their days supporting a client firm and are constantly exposed to the client's cultural artifacts, espoused values and beliefs, and underlying assumptions. The research examines the tension that exists between identifying with the focal firm and the client firm and how that tension is managed by leadership and employees. It closely examines the actions taken by leadership as well as the experiences and responses of employees to understand how a firm in this context manages this phenomenon.

This study uses the Business Process Outsourcing (BPO) firm, Chime Solutions, as the research setting because this firm strives to leverage organizational culture as a competitive advantage, and the firm supports numerous large client firms with whom they have deep, long-lasting relationships. This problem setting is unique even within the BPO industry in that each employee supports a single client full-time for an extended period. For a company that values culture as a competitive advantage, it is crucial for the firm to successfully acculturate its employees and create an environment where employees can identify with the focal firm while serving the client firm with excellence. Employee acculturation can be challenging to formalize as a process, and in this specific context, one might expect employees to experience difficulty identifying and acculturating with the focal firm.

I.3 Motivation and Gaps

While much research exists examining organizational culture, its importance, and how it links to positive outcomes both for employees and firms, guidance is scarce in the literature on how firms can acculturate individuals in the context of employees working for one firm while supporting a client firm full-time for an extended period. Specifically, the process by which leaders of the focal firm communicate and socialize their firm's culture in a way that causes employees of the firm to identify and acculturate with it is unknown. This study seeks to address the issue with the following research question:

> *How does a firm successfully balance the tension of acculturating its employees with its firm while equipping them with the needed processes, procedures, and cultural elements of the client firm they serve full-time for an extended period?*

This study provides key insights for researchers and practitioners into how a focal firm successfully communicates and socializes its culture with employees. It details the optimal firm cultural conditions and leader characteristics conducive to achieving this goal. Additionally, it examines actions taken by leadership to encourage employee identification and acculturation. The research examines the specific behaviors required of leadership at all levels to create an atmosphere favorable for employees to identify with the firm despite the constant exposure to cultural elements from the client firm for whom the employee spends extended periods supporting. The research explores employees' experiences and responses and investigates the barriers that prevent employees from identifying and acculturating with the focal firm. Finally, it inspects the role the client firm plays in the employee identification and acculturation process.

As a result of the findings, contributions have been made to theory and practice and are detailed below. The critical components of the study are summarized in Table 1.

Table 1: Components of Engaged Scholarship Research

Component	Definition	Details
P	The problem setting represents people's concerns in a real-world problematic situation.	For firms to capitalize on organizational culture as a competitive advantage, firm leadership seeks to encourage their employees' identification and acculturation. The identification and acculturation process for employees who support a client firm full-time for an extended period is unclear. When this process is ambiguous, it is difficult, if not impossible, for the firm to facilitate and replicate strong acculturation as new members onboard or as the firm grows either in size or geographical distance.
A	The area of concern represents the body of knowledge in the literature that relates to P.	Employee Identification and Acculturation
F	The conceptual framing helps structure collection and analyses of data from P to answer RQ; F_A draws on concepts from A, whereas F_I draws on concepts independent of A.	F_i: Organizational Control Theory is used as a lens through which the employee acculturation process can be examined, specifically how leadership communicates and socializes firm culture with employees who represent a single firm client full-time for an extended period. F_A: Organizational Identity Theory is the lens through which I examine how and why employees choose to identify and subsequently acculturate with the focal firm's culture despite their constant exposure to the client firm culture.
M	The method details the approach to empirical inquiry, specifically to data collection and analysis.	This research was conducted as an exploratory, holistic single case study taking an interpretivist epistemological approach and using inductive reasoning to collect data on this phenomenon. 18 In-depth, semi-structured interviews triangulated with company documents, records, training, meetings, and other field observations were used to obtain empirical evidence.
RQ	The research question relates to P, opens for research into A, and helps ensure the research design is coherent and consistent.	*How does a firm successfully balance the tension of acculturating its employees with its firm while equipping them with the needed processes, procedures, and cultural elements of the client firm they serve full-time for an extended period?*
C	Contributions influence P and A, and possibly also F and M.	**C_a:** Contribution to theory includes a detailed empirical account of how a BPO firm acculturates employees with the focal firm while balancing the tensions of client culture and builds theory through proposition development, a Conceptual Framework, and a Firm Identity Continuum. **C_p:** Contribution to practice includes recommendations on applying the Conceptual Framework to increase identification and acculturation of employees. Additionally, it provides guidance on how to use the Firm Identity Continuum to evaluate employee identity strength with the focal firm, and it includes practical recommendations to firms for improving identity strength.

II LITERATURE BACKGROUND

According to Boote and Beile, "a substantive, thorough, sophisticated literature review is a precondition for doing substantive, thorough, sophisticated research" (Boote & Beile, 2005). By understanding the strengths and weaknesses of related streams of literature and their intersection points, the current study could be best situated to add to the body of knowledge, satiate existing research gaps, and bring significant meaning to the problem area (Boote & Beile, 2005). A thorough literature background appraisal also afforded the opportunity to evaluate the theories previous researchers have used to frame studies related to employee identification and acculturation. Conducting a comprehensive literature review allows a researcher to identify the frontier of the research area while becoming an expert in the topic (Roberts, 2019).

The literature background investigation for this research begins with an overview of how it was conducted and general thematic findings, followed by a synopsis of the central-most research streams relevant to the study. It concludes with a discussion of the research gaps and a description of how the current study contributes to the body of knowledge.

II.1 Overview

A thorough search of both academic and practitioner journal articles using identified keywords and descriptors was conducted. The initial keywords included *Organizational Culture*, *Employee Acculturation*, *Organizational Control, Communicating and Socializing Organizational Culture, Concertive Control, Call Center/Contact Center, Business Process Outsourcing (BPO), Value Congruence, Identification*, *Disidentification*, *Organizational Socialization*, *Organizational Identity, Group, and Team Identity*, *Multiple Identities* and *Remote* and *Virtual Workplaces*. By examining more than 80 articles and relevant books in these fields, as a researcher, I was able to educate and immerse myself into these topics to understand better how the current phenomenon would be best positioned and how it has been examined in previous studies. The literature streams that emerged as most relevant from that experience include the following: *Organizational Culture*, *Employee Acculturation, Value Congruence, Organizational Control*, *Organizational Identification, Managing Organizational Identities, Remote Work Environments.*

While some of these literature streams were large, general, and daunting bodies of work to examine and dissect, it was necessary to ascertain how studies conducted in each domain applied uniquely to the current phenomenon. The literature background appraisal provided an opportunity to focus on the specific studies within these literature bodies pertinent to this research. While not an exhaustive list, Table 2 provides an overview of works in each of the literature streams instrumental to this study.

Table 2: Literature Overview

Organizational Culture	Employee Acculturation (BPO Industry)	Value Congruence	Organizational Control	Organizational Identity	Managing Multiple Identities	Remote Work Environments
(Schein & Schein, 2017) **Organizational Culture and Leadership**	(Bikkina, 2010) **BPO Call Centres: Psychosocial Issues and Related Ethical Conundrums**	(J. R. Edwards & Cable, 2009) **The Value of Value Congruence**	(Jaeger, 1983) **The Transfer of Organizational Culture Overseas: An Approach to Control in the Multinational Corporation**	(Albert, Ashforth, & Dutton, 2000) **Organizational Identity and Identification: Charting New Waters and Building New Bridges**	(Sandberg, 2003) **Managing the Dual Identities of Corporate Consulting**	(Chen & Nath, 2008) **A Theoretical Model of Nomadic Culture: Assumptions, Values, Artifacts, and the Impact on Employee Job Satisfaction**
(Schein, 1984) **Coming to a New Awareness of Organizational Culture**	(Feyerabend, Herd, & Choi, 2018) **Job Satisfaction and Turnover Intentions Among Indian Call Center Agents: Exploring the Role of Emotional Intelligence**	(Ryu, 2015) **The Missing Link of Value Congruence and Its Consequences: The Mediating Role of Employees' Acceptance of Organizational Vision**	(Ouchi & Price, 1993) **Hierarchies, Clans, and Theory Z: A New Perspective on Organization Development**	(Albert & Whetten, 1985) **Organizational Identity**	(C. R. Scott, 1997) **Identification with Multiple Targets in a Geographically Dispersed Organizations**	(Olson, 1982) **New information Technology and Organizational Culture**
(Sinclair & Sinclair, 2009) **Improving Hotel Efficiency Through Integration of Service and Project Management Cultures**	(Gaur, Sharma, Herjanto, & Kingshott, 2017) **Impact of frontline service employees' acculturation behaviors on customer satisfaction and commitment in intercultural service encounters**		(Ouchi & Johnson, 1978) **Types of Organizational Control and Their Relationship to Emotional Well Being**	(Dutton, Dukerich, & Harquail, 1994) **Organizational Images and Member Identification**	(Pratt, 2000) **The Good, the Bad, and the Ambivalent; Managing Identification among Amway Distributors**	
(Nazarian, Atkinson, & Foroudi, 2017) **Influence of national culture and balanced organizational culture on the hotel industry's performance**	(Manuti, Spinelli, & Giancaspro, 2016) **Organizational Socialization and Psychological Contract: The Vulnerability of Temporary Newcomers. A Case Study from an Italian Call Center**		(Ouchi & Jaeger, 1978) **Type Z Organization: Stability in the Midst of Mobility**	(Elsbach & Bhattacharya, 2001) **Defining Who You Are By What You're Not; Organizational Disidentification and the National Rifle Association**	(Pratt & Foreman, 2000) **Classifying Managerial Responses to Multiple Organizational Identities**	
			(Selmer & de Leon, 1996) **Parent cultural control through organizational acculturation: HCN employees learning new work values in foreign business subsidiaries**	(Elsbach & Pieper, 2019) **How psychological needs motivate family firm identifications and identifiers: A framework and future research agenda**	(Riketta & Dick, 2005) **Foci of attachment in organizations: A meta-analytic comparison of the strength and correlates of workgroup versus organizational identification and commitment**	
			(Weber, Gerth, & Mills, 2013) **Essays in Sociology**	(Riketta, 2005) **Organizational identification: A meta-analysis**		

II.2 Organizational Culture

Organizational Culture was the appropriate body of literature to commence this literature background appraisal as it represents the object of interest in the identification and acculturation process. Organizational Culture (OC) is defined by Schein in his seminal work as "the pattern of basic assumptions that a given group has invented, discovered, or developed in learning to cope with its problems of external adaptation and internal integration, and that has worked well enough to be considered valid, and, therefore, to be taught to new members as the correct way to perceive, think, and feel in relation to those problems" (Schein, 1984). Schein describes organizational culture in terms of three levels of observability (Schein, 1984). The three observability levels are illustrated in Figure 1 and include visible artifacts, espoused beliefs and values that govern behavior, and underlying assumptions (Schein, 1984).

Figure 1: Organizational Culture Theory

These become more difficult to discern for the outsider as they move from artifacts to assumptions. Artifacts are the group's visible products, the things you can see, hear, and feel when you encounter the group. New members learn these by being "taught" by existing members (Schein & Schein, 2017). Delving deeper to the second level of culture, as defined by Schein, is espoused beliefs and values. These are things that emerge from challenges that the group has overcome. When faced with a challenge, the organization seeks to meet the challenge with a solution. If successful, it is adopted by the group as "the way we do things" (Schein & Schein, 2017). The third and most elusive level of culture is the basic underlying assumptions. These pieces of culture emerge naturally after long periods. They are taken for granted as the way things are done, and often, employees find them hard to explain to outsiders because they are assumed (Schein & Schein, 2017). Schein's seminal work in the field of Organizational culture is comprehensive and provides a solid base for examining how a firm can successfully acculturate employees when they support a single client full-time for an extended period.

Organizational culture is foundational to the current study as it defines the "invisible asset" (Yusof & Ali, 2000) being communicated and socialized to employees in this study. Schein's seminal work in this domain set the stage for many other studies focused on Organizational Culture. Some of the themes that emerged from this domain as relevant to this study include the role of organizational culture in family firms, the motivations for adopting an organization's culture, and the relationship between organizational culture, behavior, job performance, and firm competitive advantage.

Organizational Culture studies in the context of family firms were shown to be helpful as the firm founder in this case study currently serves as the firm CEO, and two family members are senior executives in the firm. One study found that a firm's culture is often strongly rooted in the founder and hinges on the founder's presence. Although culture is a relatively stable construct, when a founder moves on from the organization, the culture can experience a shift which occurs over time (Aktaş, Çiçek, & Kıyak, 2011). Research studies examined the motivating factors for individuals employed by family-owned firms including, ethics, shared values, and other factors which may satisfy psychological needs (Elsbach & Pieper, 2019), as well as a framework that examines specific family firm characteristics which serve to motivate and demotivate employee identification and acculturation (Elsbach & Pieper, 2019).

Numerous studies in this field examine the relationship between organizational culture and behavior, job performance, and firm competitive advantage. Research has found that organizational culture influences individual members' behaviors and the overall behavior of the organization (Kyongmin, Yongseek, & Woojeong, 2018) and that a strong organizational culture acts as a "reliable compass and powerful lever" that can guide organizational members' behavior (Yusof & Ali, 2000). The psychological bond between employee and employer is an essential predictor of work-related attitudes and behaviors (Riketta & Dick, 2005). Organizational culture has shown to be a leading resource for organizations to maintain their competitive advantage and impact organizational performance (Sinclair and Sinclair, 2009, Nazarian et al., 2017).

Studies are numerous in the domain of organizational culture and family firm dynamics concerning organizational culture, motivations for employee adoption of an organization's culture, and the relationship between organizational culture, behavior, job performance, and firm competitive advantage help position the current study. However, a gap exists in this literature domain regarding how the "asset" of culture is communicated and socialized by a focal firm to its employees who support a client firm full time for an extended period. This research study seeks to fill that gap.

II.3 Employee Acculturation in the BPO Industry

Research studies in the employee acculturation domain, and specifically targeted at the Business Process Outsourcing Industry, offered insight into the current study. Four themes that emerged in this body of literature include: masking to balance national and foreign culture, flexing national styles to match customer styles, evaluating the role of emotional intelligence in job satisfaction and turnover, and comparing how permanent and temporary job status affected psychological company bonds.

Each of these studies provided insight into the current study by addressing the BPO industry's intricacies in terms of employee identification and acculturation. Bikkina's work examines India’s BPO industry and gives special consideration to employees’ ethical perspectives (Bikkina, 2010) and how Indian nationals balance the tension between their native culture of India with the demands of an overwhelmingly western customer base. The research examined how employees, in many cases, are required to “mask” their location and neutralize their accents to assimilate with their mostly western customer base. This research examines the adverse impacts of the work culture and the psychological disorientation and distress this causes (Bikkina, 2010).

The Gaur et al. study focused on how employees, specifically immigrants serving in customer-focused roles, flexed between cultural styles to serve customers. The study examined the impact four acculturation behaviors -- assimilation, separation, integration, and marginalization -- had on customer satisfaction and customer commitment in the banking industry (Gaur et al., 2017). This study posited that to build a meaningful relationship, employees in the service industry need to exhibit appropriate acculturation behaviors to match different relational conditions (Gaur et al., 2017).

Based in an Indian call center, another study engaged 299 call center agents in Bangalore and New Delhi to measure their emotional intelligence, job satisfaction, and turnover intentions. The study quantitatively examined the role emotional intelligence played in job satisfaction and turnover intentions. Analyses revealed that emotional intelligence was positively related to job satisfaction, and job satisfaction mediated the relationship between emotional intelligence and turnover intentions. (Feyerabend et al., 2018).

The last relevant study was conducted in the BPO industry of an Italian Call Center, and it examined how agents connected psychologically with their employing firm based on their status as temporary or permanent employees. This study provided empirical evidence on the relational or transactional connections employees made with their employing organization (Manuti et al., 2016).

These studies are relevant and offered insight into the current study, providing considerations and linkages to the current problem setting. For example, the extant studies regarding masking and flexing are similar to the demands placed on employees in this case who manage their identity with the focal firm while representing their client, and in some instances, allow client customers to believe they are speaking with a client company employee. Learnings from these studies prove insightful; however, none of these studies focuses on encouraging acculturation with the focal firm or provides empirical evidence into the process by which BPO employees identify and acculturate with their focal firm addressing the intent of this study.

II.4 Value Congruence

Value congruence is a relevant literature stream to consider for the current study as it examines organizational “fit.”. Value congruence refers to the perceived similarity between values held by individuals and those of organizations (Ryu, 2015). Research shows that when employees hold values that match the values of their employing organization, they are satisfied with their jobs, identify with the organization, and seek to maintain the employment relationship (J. R. Edwards & Cable, 2009). Empirical evidence supports that a positive relationship exists between value congruence and job satisfaction, indicating that the higher the congruence between the work values of employees and their supervisors, the greater job satisfaction for employees (Ryu, 2015). Employees are shown to leave organizations if they feel there is a misfit (Ryu, 2015). Quantitative research by Edwards and Cable indicates that the relationships that link individuals and organizations to positive business outcomes are trust followed by communication (J. R. Edwards & Cable, 2009).

Other research in the value congruence domain suggests that employers should assess applicants’ beliefs, values, and characteristics to determine if they are compatible with the hiring organization (Ryu, 2015). Additionally, research indicated the criticality of supervisors “buying into” the organization’s values and goals to encourage their direct reports also to do so. This prevented misunderstanding among employees who could easily become confused about their role and the mission if messaging is not appropriately aligned (Ryu, 2015).

These studies in the value congruence domain informed the current research as the “fit” between employee and firm is a factor in the identification and acculturation process. While this stream of literature thoroughly considers the motivation and benefits of value congruence, it fails to qualitatively show its role in the identification and acculturation process for employees who work for one firm but support a client firm full-time for an extended period.

II.5 Organizational Control

Research in the Organizational Control domain was extensive and helpful for positioning this study. Organizational Control Theory is used as an intellectual vehicle in this research and is detailed more thoroughly in this document's Theoretical Framing chapter. Organizational control emerged as an essential literature stream for the current study as it explains how concepts are transferred from firm leadership to employees. While much research centers on communicating job role requirements, applying it to the identification and acculturation process is a unique opportunity. To better understand how the literature applied to the current research, I reviewed the existing studies. Relevant studies in this domain included concept evolution, organizational control by organizational culture types, control mechanisms, control techniques employed by multinationals, and the Concertive Control strategy. A gap exists in applying control techniques and mechanisms to the context of the current research.

Harkening from early studies conducted by Weber in his sociology essays, he discusses the need for discipline or control of workers through a hierarchical structure to achieve optimal worker profitability (Weber et al., 2013). In his seminal work, Richard Edwards examines the concept of control on the labor workforce. He studied how labor *power* is translated into labor to achieve tangible business outcomes and considered factors such as worker motivation, diligence, discipline, loyalty, and work habits (R. C. Edwards, 1976). Validating this work through later studies, Bailly and Léné revisited the three characteristics of a "good worker" (Bailly & Léné, 2015). These are defined as an employee who adheres to rules, an employee who adheres to the spirit of rules, and an employee who demonstrates loyal and committed behavior, which leads him to identify with the firm by internalizing its aims and values (R. C. Edwards, 1976).

In his seminal research, Ouchi identified and compared Organizational Culture Types A, J, and Z based on cultural norms in the US and Japan and provided a framework for identifying an organizational type and its attributes (Ouchi & Johnson, 1978). The research was furthered by examining Type Z organizational attributes and investigating the group's mechanism to socialize firm culture. The Clan mechanism was found to be most conducive to the Type Z firm that promoted holistic care, consensual decision making, individual responsibility, implicit and informal control, and long-term employment (Ouchi & Jaeger, 1978). This research further linked the concept of type Z culture to the likelihood of employee identification, citing that when individuals' goals are merged with the organization's, employees are provided with the motivation needed to serve the organization (Ouchi & Price, 1993).

Examination of studies focused on social mechanisms revealed extensive research on Bureaucratic Hierarchical, Market, and Clan cultures. Social mechanisms are structures put in place for a firm to ensure continued working relationships, the motivation to pursue worthy goals, and the ability to share information necessary to execute goals effectively (Ouchi & Price, 1993). Research on clans, identified as highly homogenous organizations made up of individuals who share common values, objectives, or beliefs, indicated that these cultures rely on other group members to socialize new members (Ouchi & Price, 1993). Jaeger's research examined large Japanese firms to understand how implicit and informal control could influence employees to behave in accordance with the company "way." (Jaeger, 1983).

Organizational control studies conducted in the multinational context resulted in relevant findings that inform the current study. Research was conducted at geographically dispersed subsidiaries and found that while communicating process and outcome expectations was clear, sharing values and less tangible concepts from headquarters to subsidiaries was more ambiguous (Brenner & Ambos, 2013). This finding informs the current study, which focuses on sharing the less tangible concept of focal firm culture. Research in this space also examined how a strong firm culture could be maintained in dispersed locations with the placement of entrenched managers who can socialize the culture with direct periods of contact for significant periods (Selmer & de Leon, 1996). This finding can be expanded upon in the current research when applied to the context of a firm whose employees support a client firm full-time for an extended period.

Finally, research that applied the Concertive Control Strategy proved relevant as it elicits participatory organizational techniques, such as team-based management, to promote a strong feeling of ownership and empowerment among employees. When this strategy is employed, members work together toward common organizational objectives. Members are empowered to control their behavior and encouraged to take responsibility for their peers for the organization's benefit (Gossett, 2012). Research examined how applying the Concertive strategy led employees from merely adhering to the rules to embodying behaviors as loyal and committed employees

(Barker, 1993). They created a value-based system of control and then invested in it through their strong identification with the system (Barker, 1993). The study indicated that as employees identify with the organization and the goals of the organization and the individual merge, culture is strengthened. Another study examined the Concertive Control strategy in the service industry and found that while the type of control has changed since it was first examined in the 1970s, the need has not lessened (Bailly & Léné, 2015). The research in the Organizational Control domain is significant. However, there is a scarcity of information examining how organizational control concepts could apply to the current research of how leadership in a focal firm fosters acculturation with employees who support a single client full-time for an extended period. This research seeks to fill that knowledge gap.

II.6 Organizational Identification

Organizational identification is defined as a cognitive connection between a person and an organization (Bhattacharya & Elsbach, 2002; Dutton et al., 1994; Mael & Ashforth, 1992). It is the degree to which a member defines himself by the same attributes that he believes define the organization (Dutton et al., 1994), and it is indicated by self-perceptions of "oneness" with the organization (Elsbach & Bhattacharya, 2001; Mael & Ashforth, 1992). Research found that when an individual's identity and an organization's identity overlap or are congruent, the concept of organizational identification surfaces (Elsbach & Cable, 2019). When individuals define who they are, even partially, by the organization with whom they are employed, they are known as organizational identifiers (Elsbach & Pieper, 2019).

The literature in the Organizational Identification domain is extensive and covers multiple areas of this concept. Relevant studies include research into the importance of employee identification to organizations, motivating factors of employees to identify, and benefits of identification for employees.

Research indicates that more robust organizational identification results in increased benefit for the individual and the firm (Ashforth & Mael, 1989). When a strong bond exists between the employer and the employee, it results in benefits such as lower turnover, greater employee effort and engagement, and increased cooperation toward firm goals (Pfeffer & Sutton, 2006). Research has also shown that companies that place a high value on culture often consider the whole employee, including the employee's family and other interests outside of the firm, to build a deeper connection between the individual and the firm (Pfeffer & Sutton, 2006). The stronger the culture and the more consistent the character, the higher the likelihood of employees identifying with it (Ashforth & Mael, 1989). Research found that embracing an employee holistically rather than merely as a "worker" plays a role in firm identification.

Studies examining the motivation for identification found that people who identify with an organization tend to internalize collective goals as intrinsically motivating (Van Dick, Ullrich, & Tissington, 2006) rather than seeking only financial gain. Numerous studies have examined the benefit realized by employees who identify with their firm. Maslow's seminal research on the human hierarchy of needs describes the human need of Belonging and Love (Maslow, 1970; Mennella & Holle, 2018). Studies have found that all people have a need for affiliation, belonging, or love, and employees are motivated to identify with their firm because this can be satisfied through feeling that they are part of a group or company (Ouchi & Jaeger, 1978). When individuals identify with their organization, it can be said there is an organizational commitment or a "psychological attachment" (Ryu, 2015). Organizational identification is one form of psychological attachment that occurs when members adopt the organization's defining characteristics as defining characteristics for themselves (Dutton et al., 1994). Research also indicates that organizational membership provides a place for employees to reinforce their preferences of who they are as individuals, and individuals often either commit to (identify) or disengage (disidentify) with a group that does not embody characteristics they see as congruent with their own (Ryu, 2015). Research has shown that a person is strongly identified with an organization when his identity as an organization member is more salient than alternative identities, and his self-concept has many of the same characteristics he or she believes define the organization as a social group (Dutton et al., 1994).

Finally, studies show that stakeholders who fail to identify may continue in an exchange relationship with an organization but with reduced trust. These employees support the organization's goals only to the extent that it benefits them personally (S. G. Scott & Lane, 2000). This body of literature provided a deep understanding of this concept and helped position the current study in this domain. The identification domain fails to provide an empirically based framework addressing the employee identification process for individuals who work for one firm while supporting a client firm full-time for an extended period. The current research seeks to fill that knowledge gap.

II.7 Managing Multiple Workplace Identities

As a sub-set to the organizational identification domain, specific focus was given to the concept of managing multiple workplace identities. Research indicates all humans have a self-concept, and they relate with various identities in their lives, with some of those identities reigning stronger than others (Littlejohn, 1996). Moreover, individuals may value particular identities more or less depending on the situation. (Littlejohn, 1996). Several studies in the domain of multiple workplace identities offered perspective for the current research. The first study quantitatively examined how employees in a decentralized firm managed multiple identities, specifically the overall firm versus their workgroup. This study used Social Identity Theory as the lens through which to examine multiple identities in a geographically dispersed organization. It sought to learn how members could be induced to identify strongly with the firm as a whole and avoid disintegration (C. R. Scott, 1997).

A second study examined how employees navigated identification through organizational mergers. Providing insight into the current phenomenon, this quantitative study argued that mergers threatened firm identity, which in turn threatened an individual's social identification with the organization (Van Dick et al., 2006). The research found that strongly identified employees are more satisfied, less likely to withdraw, and more willing to put in extra effort (Van Dick et al., 2006), confirming the importance of aiding the focal firm identification and acculturation process.

A third study conducted qualitatively by Pratt et al. contended that multiple organizational identities could and should be managed, and this research developed a framework for understanding the management of multiple organizational identities. Focusing not on how a given individual manages his or her own multiple identities, this research examines how organizational leaders can manage multiple conceptualizations about "who are we" as an organization via compartmentalization, deletion, integration, and aggregation (Pratt & Foreman, 2000).

The empirical evidence from another quantitative study found that employees identified more closely and were more committed to their workgroup than the organization. The evidence in this study suggested workgroups were a more salient social unit that served the needs for optimal distinctiveness for employees (Riketta & Dick, 2005). The research also found that sometimes attachment to a workgroup conflicts with the greater organization (Riketta & Dick, 2005).

The studies examined the management of multiple work identities; however, no research addressed the identification and acculturation process for firms that employ individuals who support a client firm full-time for an extended period. This research seeks to populate that knowledge gap.

II.8 Remote Work Environments

This literature stream was not originally part of the research design but was added when physical proximity emerged as a barrier for some employees to identify and acculturate with the focal firm. At that time, a cursory search of the academic literature seemed prudent. Academic literature includes qualitative and quantitative studies examining the relationships between employees and remote work environments using Socio-Technical Theory and Nomad Culture Theory and investigates how employee identification integration, authenticity, and unethical behavior are related to remote working environments (Chen & Nath, 2008). Much of the research focuses on the control and trust of employees. The academic literature regarding remote work dates back far before the 2020 Covid-19 global pandemic. One study from 1982 examined how technological advances change an organization's culture (Olson, 1982). The Olsen study of 1982 predicted that a decentralized workforce would offer increased flexibility as physical constraints were loosened (Olson, 1982). Interestingly, this was almost 40 years ago when technology was not developed enough to support most remote work efforts.

Another study found that work-life balance and feelings of isolation were an issue for some workers (Chen & Nath, 2008). One CIO in the Chen study commented that "the job is no longer from 8:00 to 4:30 every day, it is somewhat around the clock (Chen & Nath, 2008). This literature stream was important to include in this literature investigation as physical proximity emerged as a barrier for some employees in the identification and acculturation process. While representing just one factor of the process, this is an important consideration to monitor as the future of work evolves.

II.9 Literature Summary

The literature background required for this current phenomenon was expansive and included seven relevant research areas. First, the literature background included a deep dive into the Organizational Culture research field, focusing on Schein's work defining culture for organizations. Gaining a deep and broad understanding of the research surrounding the three levels of cultural observability was required to set the stage for this study by defining the invisible asset the focal firm seeks to share with employees through the identification and acculturation process.

Second, the phenomenon led into the domain of Employee Acculturation in BPO firms. Studies in this literature domain helped situate the research by examining the studies in a similar business context. These studies measured emotional intelligence, job satisfaction, and turnover intentions of employees in these settings. Finally, these studies examined how agents connected psychologically with their employing firm and compared how permanent and temporary employees developed psychological connections to their firm based on their employment status or full-time or temporary. Two gaps in the literature exist in this research. First, studies could not be found which examined the tensions experienced by representing a client full-time for an extended period and flexing between the client and the focal firm cultures. Second, a gap in the literature exists in the employee acculturation process within this case study's unique context.

The third stream of literature focused on Value Congruence. The research in this space is extensive, but it fails to qualitatively show the role value congruence plays in the identification and acculturation process for employees who work for one firm but support a client firm full-time for an extended period.

Organizational Control was the fourth stream of literature investigated. These studies specifically examined culture types, the social mechanisms used to manage working relationships, the communication and relational techniques used to enact control, control research with multinationals, and the application of the Concertive Control strategy. These studies were critical to situate the current research and understand the way control has been used to elicit a response from employees.

Research in the Organizational Identity domain identified the seminal and applicable pieces of work conducted in this body of academic research. Relevant studies included motivating employee identification factors and benefits of identification for employees and organizations. Applying Organizational Identification principles to the current study's unique context exposed a gap in the literature.

Literature in managing multiple workplace identities offered research more closely related and tangential to the current phenomenon. The studies in this domain examined balancing multiple identities in a geographically dispersed organization and navigating the identification effects after an organizational merger. This research provided insight into how multiple organizational identities could and should be managed using a developed framework. These studies focused on balancing the entire organization's culture with the individual workgroups, which offered insight to this study.

Finally, the literature background briefly considered the academic studies in the field of remote work environments. This is an exciting stream of literature as it is contemporary and evolving. While this research's genesis began nearly four decades ago, it helped decipher the empirical findings from this study.

Synthesizing the literature positioned the current research phenomenon within these knowledge domains and assisted with illuminating the existing gaps. Some of the literature served to inform the research, and other studies helped identify the academic literature gaps in these domains. The current study examines how employees identify and acculturate with the focal firm while working with a single client firm full-time for an extended period. It examines how culture is communicated and socialized to employees by examining firm culture, leader characteristics, and leadership actions, and it assesses employee experiences in response to these actions. Using qualitative measures, this study examines the barriers employees face with identifying and acculturating and the role the client plays in the acculturation process. Developing an Identification and Acculturation process in this unique context fills the gap in the academic literature in each of these domains. Organizational Control Theory and Organizational Identity Theory serve to inform the current phenomenon. The following chapter examines each of these theories and how each is used to inform this study.

III THEORETICAL FRAMING

By conducting a thorough literature background investigation, two theories emerged as relevant lenses through which to examine the study: *Organizational Control Theory* and *Organizational Identity Theory*. In addition to these two theories, Schein's Organizational Culture Theory proved relevant as a background theory in this study. Schein's theory of Organizational Culture identifies the "invisible asset" (Yusof & Ali, 2000) communicated and socialized by leaders and responded to by employees. Organizational Control Theory and Organizational Identity Theory are foreground theories that help explain how culture is communicated and socialized and how it is received and experienced by employees. Those theories are expounded upon in this chapter, while Organizational Culture Theory is highlighted more thoroughly in the Literature Background chapter of this manuscript.

III.1 Organizational Control Theory

It was necessary to turn to applicable theory to understand how a firm can ensure leadership influences employees to experience the firm's culture positively. Organizational Control Theory, which examines the process by which one party attempts to influence the behavior of another within a given system, provided a lens through which to examine how leaders in a firm communicate with employees. Organizational Control Theory describes how one party, usually management, attempts to direct another party's behavior, typically the employees. There are multiple approaches to how control within an organization is established, but in all instances, individuals surrender some personal sovereignty to join with others in the organization to work toward common goals and purpose (Gossett, 2012).

Organizational Control Theory, as shown in figure 2, provides an appropriate lens through which to examine this study as it focuses on communication, including written directives or rules, verbal commands, and peer pressure to ensure employee compliance (Gossett, 2012).

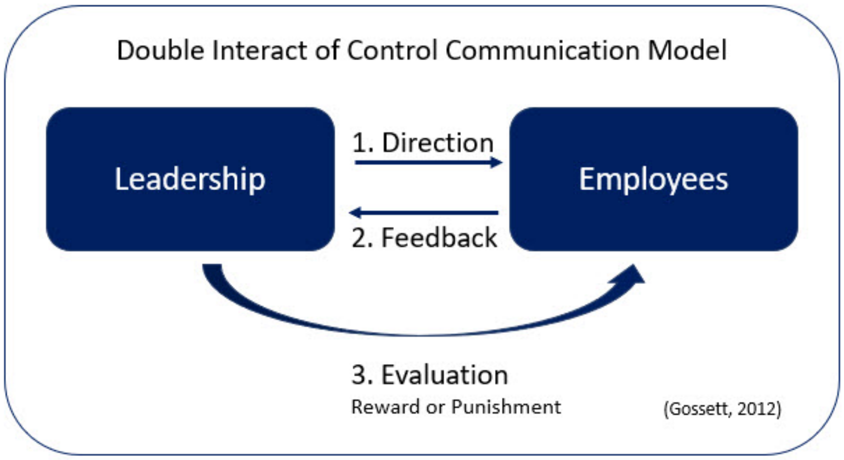

Figure 2: Double Interact of Control Mode

Cheney and Tompkins, communication scholars, contributed a three-step framework for how control is communicated within organizations (Gossett, 2012). Step one entails management communicating a message to employees. Step 2 includes the feedback returned to management from employees regarding the received message. This feedback could come in the form of compliance or non-compliance. Step 3 is leadership's evaluation based on the feedback received from employees. In other words, if management is pleased with employee response, a reward may be in order. Conversely, if management is not pleased with employee response, a punishment could be administered (Gossett, 2012). For example, if management directs employees to adhere to a strict schedule of 8:30 am – 5:00 pm with two assigned 15-minute breaks and one 30 minute lunch break, and employees adhere to this directive, they keep their job, they do well, and they may receive a benefit in the form of a pay raise or additional job opportunities. If employees do not follow this direction provided by management, an employee could be fired or obtain another punishment in the form of a negative evaluation.

The tension of Organizational Control Theory is that management's best interests and employees' best interests may not always be aligned. When applying this theory to employee identification and acculturation, it is even more elusive. As with other directives, this involves communication from leadership to employees; however, identification and acculturation are dependent upon the employees' keen desire to embrace and embody the firm's culture. When Organizational Control Theory is applied to work product, if employees neglect to comply with firm processes and regulations or fail to deliver the expected outcomes, negative consequences will be realized by the firm and the employee. However, embracing and embodying culture is more abstract. While acculturating with the focal firm enhances business outcomes for both the organization and the employee, it is difficult to legislate because, ultimately, it is the employee's choice. In other words, an employee can perform a job role adequately without fully embracing and embodying the firm's culture. Research indicates that individuals tend to support the organization's goals only to the extent it benefits him (S. G. Scott & Lane, 2000). The challenge in applying this theory to culture rather than required work behaviors is that the firm culture must be desirable for the employees to accept or their feedback to leadership will not be positive., However, unless it results in egregious behavior, there will be no punishment, negating step 3 of Cheney and Tompkins' model in this context.

Concertive Control is an organizational control strategy that relies on participatory organizational techniques, such as team-based management. This aims to promote a strong feeling of ownership and empowerment among employees. This strategy could potentially be applied when employees are not required to comply and must willingly accept cultural messages. In a

Concertive system, employees work together toward common goals taking responsibility for themselves and their peers (Gossett, 2012). Because this strategy encourages ownership, employees are more likely to be receptive to communication in this form from firm leadership. If the focal firm's leadership embraces this concept as a way of socializing and communicating culture to employees to build an environment of “oneness”, it could lead to successful acculturation of more focal firm employees.

III.2 Organizational Identity Theory

Developed and popularized by George Cheney and Philip Tompkins in the 1980s, Organizational Identity Theory (OIT) seeks to address how self-concepts held by employees of organizations shape and are shaped by the attachments these individuals make in the workplace (Littlejohn & Foss, 2009). The theory relates to how employees achieve belonging to an organization, and it strives to understand “who we were,” “who we are,” and “who are we becoming as an organization?” (Littlejohn & Foss, 2009; Whetten, 2006). The question is answered by describing what is central, distinctive, and enduring about itself (Albert & Whetten, 1985; Lawrence & Kaufmann, 2011; Zellweger, Nason, Nordqvist, & Brush, 2013).

In Albert and Whetten’s seminal article on Organizational Identity, central is defined as the features which embody the essence of the organization; distinctive is defined as the features that are different from other comparable organizations; and enduring is defined as the features that exhibit a degree of continuity over time (Albert & Whetten, 1985). Organizational Identity Theory (OIT) assumes that people contextualize relationships by creating models of themselves, the world, and themselves in the world (Littlejohn & Foss, 2009). These models are then used to make sense of who the individual is and who they are in relation to others (Littlejohn & Foss, 2009). See figure 3.

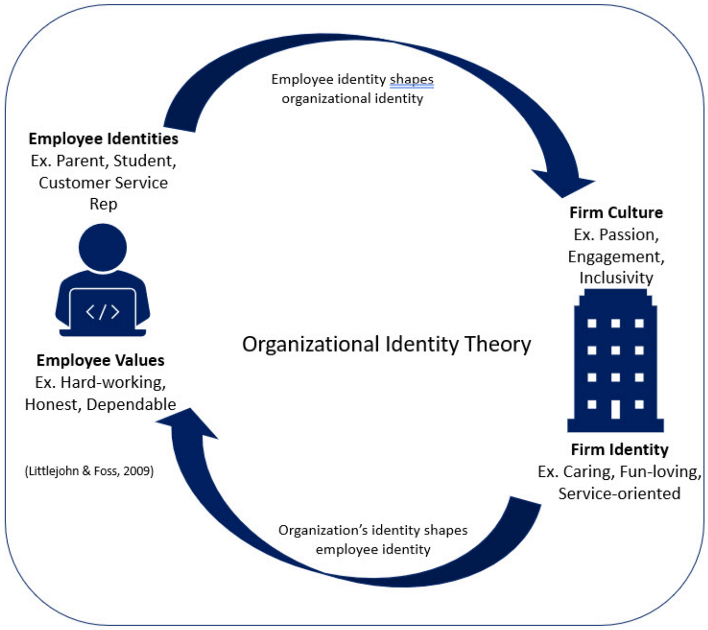

Figure 3: Organizational Identity Theory

Identification is a fundamental social process that ties people to organizations and other collectives by linking their identities, often described as a sense of "Oneness" (Elsbach & Cable, 2019). Formally, Dutton, Dukerich, and Harquail (1994, p. 239) define identification as the "degree to which a person defines him or herself as having the same attributes that he or she believes define the organization." (Bhattacharya & Elsbach, 2002). It stands to reason that individuals who identify with their organization describe a feeling of oneness. However, unlike culture which tends to remain constant (Smith, 2019), identities continually evolve as individuals continue to interact with it. Workplace identities are established over time based on performance, but they are fluid and change as interactions change (Littlejohn & Foss, 2009) which is why the identities of both the employee and the organization are continually evolving and pressing on each other as shown in figure 3.

III.3 Applying Theory to Employee Acculturation

The current phenomenon raises the question of how employees who are employed by one firm but who support a client firm full-time for an extended period identify and acculturate to the focal firm. The focal firm desires that the employees develop strong identification with the firm to build and sustain a robust organizational culture that can contribute to a competitive advantage while managing the tension of providing the client firm with the optimal service levels. The current study marries Organizational Control Theory and Organizational Identity Theory concepts to create a lens to examine this unique business context.

The diagram shown in Figure 4 layers the theories to conceptualize them with one another.

Figure 4: Layered Theoretical Model

Using Organizational Culture as a background theory helped identify the elements of culture essential to the focal firm and how they are communicated through the identification and acculturation process from the focal firm to the employees. Additionally, Organizational Culture

Theory supports the notion that employees serving a single client firm full time for an extended period could be susceptible to identity confusion by interacting with the client firm's cultural elements of artifacts, espoused beliefs and values, and underlying assumptions all day every day. Group members learn about cultural artifacts by seeing them, but to go deeper into espoused values and underlying assumptions, it is necessary to venture into the group's inner circle (Schein & Schein, 2017). In this case, employees spend an extended time immersed in the elements of the client's culture, so the focal firm must increase efforts to ensure employees view the focal firm as the most salient identity (Dutton et al., 1994). The increased challenge of proximity introduced by the 2020 Global Covid-19 Pandemic amplifies the urgency for focal firm leaders as it is even more difficult for employees to access the focal firm's culture and its three levels of observability remotely.

Organizational Control Theory and Organizational Identity Theory are foreground theories in this research. Organizational Control Theory is the lens through which the researcher examined leadership actions. Organizational Identity Theory examined the phenomenon from the opposite angle to learn how employee experiences facilitated employee identification and acculturation with the focal firm while the employees supported their client full-time.

While Organizational Control Theory typically is employed in cases where employees must comply with specific work requirements, I applied Cheney and Tompkins three-step model to the identification and acculturation process. In this case, leadership takes step 1 in the model by providing direction and attempting to entice employees to embrace and embody the focal firm culture. The employees respond by taking step 2 and providing favorable or unfavorable feedback to leadership's direction to identify and acculturate. Step 3 represents leadership's evaluation of employee feedback and comes as reward or punishment. In this case, there is not specifically a reward or punishment for failing to identify and acculturate, but an additional “reward” could come in the form of increased relationship and connection.

Organizational Identity Theory is the lens through which to view the employee perspective in this phenomenon. Organizational Identity Theory attempts to address how self-concepts held by employees of organizations shape and are shaped by the attachments these individuals make in the workplace (Whetten, 2006). In this case, empirical findings address the experiences shared by employees in response to leadership direction. These correspond to the cyclical model of linking identities between the employee and the firm to create “oneness.” (Elsbach & Cable, 2019).

IV METHODOLOGY

This qualitative case study employs an interpretive epistemological approach to understand how a firm successfully acculturates its employees to align with its firm's culture and values when their employees work full-time for extended periods supporting a client firm. The purpose of this research is two-fold. First, to contribute to the body of knowledge in the Employee Acculturation and Identification fields of study by building theory through proposition development, a conceptual framework based on empirical evidence, and a practical framework to gauge employee identification. Second, to contribute to practice with recommendations to apply the conceptual and practical framework to evaluate and improve identification and acculturation.

The foreground theories used as the intellectual vehicles to examine this phenomenon are Organizational Control Theory and Organizational Identity Theory. Schein's Organizational Culture Theory is used as a background theory to describe the invisible assets of an organization's culture. Organizational Control Theory provided the basis for examining how leadership acculturated employees, specifically, the actions leadership took to share the culture. Organizational Identity Theory is the lens through which I examined how and why employees who work for one firm but support a client firm full-time and for an extended period identified and subsequently acculturated with the focal firm. To consider this process in totality, it was necessary to marry concepts from each of these three theories, detailed in this document's Theoretical Framing chapter.

Qualitative research was conducted to examine this phenomenon. This is an ideal method to employ when a researcher explores a phenomenon and attempts to make sense of what is happening. Although sometimes difficult to generalize to a large population size, qualitative research is well-suited when embarking on exploratory research that pertains to social, cultural, and political aspects of people and organizations (Myers, 2013).

The case study method was selected to examine this contemporary phenomenon, and this research is a single case, holistic study with the case as the unit of analysis. A case study is an empirical method investigating a contemporary phenomenon in depth in its real-world context (Yin, 2018). Research case studies are written for other researchers, not students, and they are used as empirical evidence to convince other researchers of the applicability or inapplicability of a particular theory (Myers, 2013). The case study is the most applicable research method to examine the present phenomenon as case studies rely on direct observation of the events being studied and interviews of the persons who may still be involved in those events (Yin, 2018). Case research methodology is particularly appropriate for answering "how" or "why" questions and supports field-based research conducted in natural settings (Kvasny & Keil, 2006). It is the most appropriate method to pursue when the researcher has little or no control over behavioral events and when the study focus is a contemporary phenomenon rather than a historical one (Yin, 2018) such as the present instance.

An interpretivist approach was selected as the epistemological lens through which this phenomenon was examined. Using inductive reasoning, a 'bottom-up' approach allows the researcher to collect data about the topic (Myers, 2013). When this method is employed, patterns emerge through analyzing the data, leading to theory development. The sections following expound upon the use of data sources, data collection, and data analysis. Myers' qualitative research model, with its five components, is depicted in figure 5 (Myers, 2013).

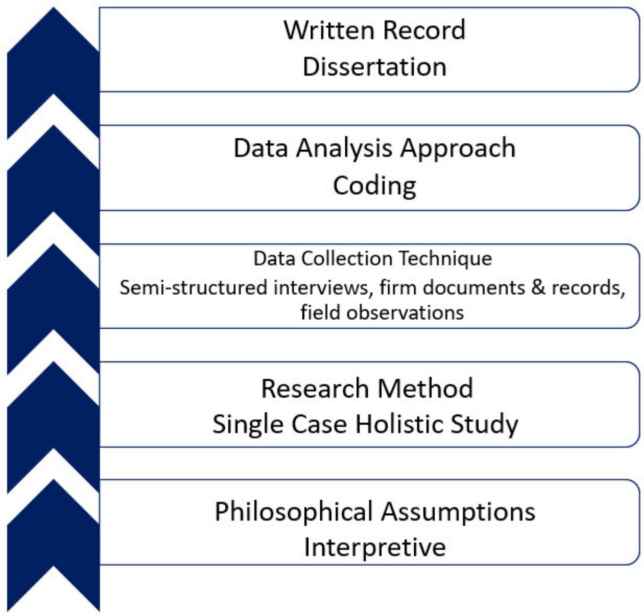

Figure 5: Myers Qualitative Research Model

IV.1 Research Setting

The research setting in this case study is a business process outsourcing firm called Chime Solutions, headquartered in Morrow, Georgia, a southern suburb of Atlanta. The firm is self-described to deliver best-in-class contact center solutions as a service, emphasizing a people-first culture, entrepreneurial growth mindset, and community-centered involvement. The firm has been in business since 2015, and the founder is actively involved as the CEO of the company. It is a privately held, family-owned, and operated firm. Both the founder's wife and daughter serve as an active part of the senior leadership team along with other senior leaders, some of whom have worked with the family in previous ventures. The firm employee count fluctuates seasonally to accommodate client needs but employs approximately 1,500 people at three facilities in the United

States. The company owner is African American, and the firm employees are about 95% African American, mostly women, including many single moms.

This company is typical of other Business Process Outsourcing (BPO) firms in many ways. The firm is susceptible to high turnover and consists of primarily entry-level, frontline jobs where employees filling these roles interact with customers continuously throughout their day. In this industry, employees endure harsh conditions which require them to be on the phone for the central portion of their job working in their client's systems. Employees must adhere to a strict schedule to ensure the appropriate coverage is achieved to serve customers expeditiously. Unlike entry-level employees in other fields, these individuals must exhibit high maneuverability, exhibit strong customer empathy, and possess flexible and robust communication styles to provide the superior customer service the firm promises its clients. They do this while balancing low autonomy and adhering to strict scheduling. This is the nature of the BPO industry. In the BPO industry, adherence to call handling times places additional pressure on these employees.

Chime is atypical of BPO firms in other ways. First, the mission of the firm differentiates it from other BPOs or call center firms. The firm's mission is to "challenge the outsourcing status quo by redefining customer care as a service through its socially-driven mission, enabling clients to succeed and communities to thrive." The company strives to make a difference in its employees' and clients' lives and within its communities. The company aspires to partner with its clients transparently and to operate as "one" so all can benefit. The firm believes they can serve their client's customers best when they benefit from client expertise, guidance, and support throughout the engagement. Second, the company is intentionally headquartered in an under-resourced area to bring jobs to a community where they are especially needed. Unlike most firms that seek to locate in an area where they can attract the best talent, this firm believes there is a wealth of untapped human talent in areas that have long been neglected. By purposefully electing to operate in under-resourced areas, the firm faces additional obstacles on-boarding and acculturating its employee workforce. In the past several years, the company has expanded to two other under-resourced communities on the edges of the metropolitan cities of Charlotte, North Carolina, and Dallas, Texas, and seeks to create 10,000 jobs nationwide in this decade.

A third and significant differentiator for this firm is its unique service operating model. Each Chime employee represents a single client. This specialization equips the employee to represent their assigned client best, but it also poses a risk to the focal firm as it exposes each employee to the client firm's culture all day and for an extended period. See Figure 6 as an example of the service model employed by Chime.

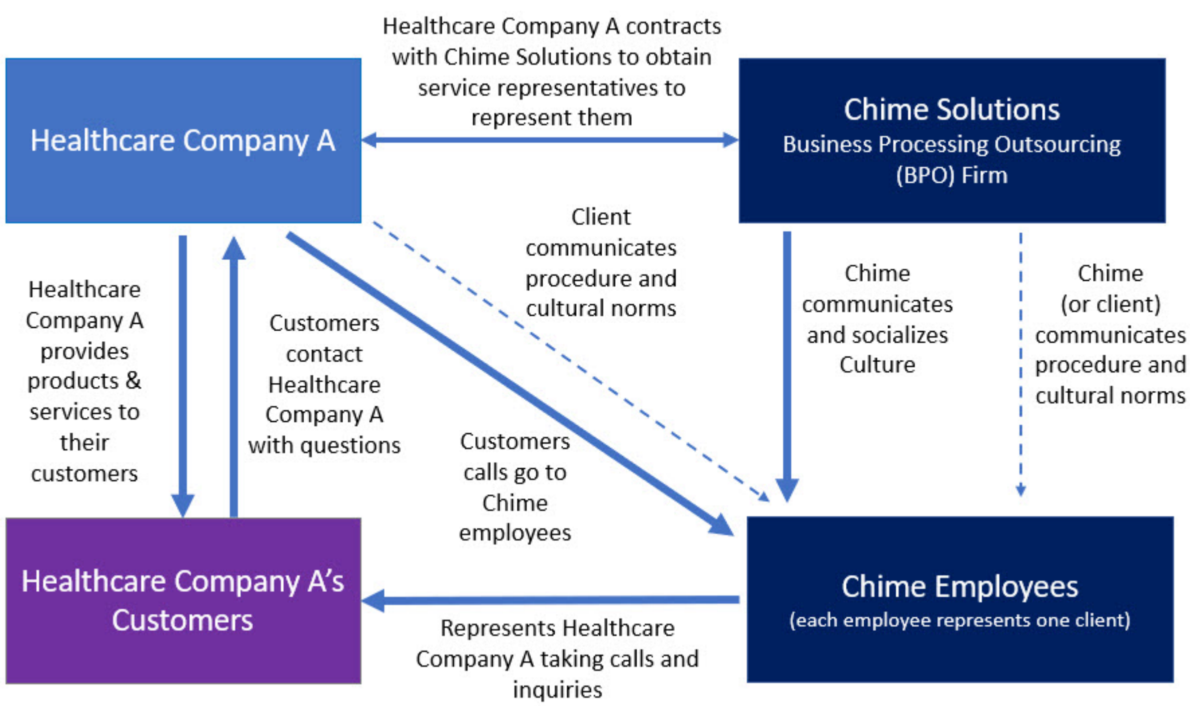

Figure 6: Research Setting Service Model

Figure 6 shows an example of how the firm operates. In this case, Healthcare Company A has customers for whom they provide products and services. Healthcare Company A contracts with Chime Solutions, Business Process Outsourcing (BPO) firm, to handle all customer service calls. A segment of Chime's employees represents Healthcare Company A as their sole client. Chime Solutions socializes its firm's culture with all Chime employees while also equipping the segment of employees representing Healthcare Company A with knowledge of processes, procedures, and cultural elements needed to represent that client best. Sometimes, the client provides the procedural training, and sometimes it is a Chime employee that provides this training to the employees depending on the client. When there is a need, Healthcare Company A's Customers contact Healthcare Company A. However, they are interacting with an employee of Chime Solutions rather than a Healthcare Company A employee. Even though the Healthcare Company A Customers might realize that the customer service representative is part of a business process outsourcing firm, the customer generally assumes the individual they are interacting with is an employee of Healthcare Company A and expects the same level of service he associates with that company.

Most individuals have personally experienced negative interactions and poor customer service when contacting a company. Along with the frustration experienced when engaging with a customer service representative who does not seem to know or care about an issue, the caller may experience incongruency between that particular contact and the impression the caller had previously with the company. Ultimately, the poor experience may color that customer's perception of the company negatively. For that reason, it is crucial to Chime's clients that the Chime employees supporting Healthcare Company A represent the firm as well as one of their own employees. Doing so results in positive outcomes for Healthcare Company A and Chime

Solutions, but it highlights the possibility of a Chime employee identifying and acculturating with the client firm over time rather than with Chime as the focal firm.

It was suitable to choose Chime Solutions as a research setting and appropriate to conduct a case study because as a researcher, I had the unique opportunity to access company executives, as well as all levels of leadership and employees, documents regarding firm details and history, and the resources to perform fieldwork with each group virtually. In a case study, the primary source of data is interviews, supplemented by documentary evidence such as annual reports, minutes of meetings, and so forth (Myers, 2013), which aggregate to provide a rich and holistic view of the phenomenon.

IV.2 Data Sources

Empirical data for this single, holistic case study was obtained in multiple ways. First, 18 in-depth, semi-structured interviews were conducted with individuals employed at Chime Solutions. This included a range of individuals from newly hired agents to the CEO and every leadership level in the hierarchy in between to provide the broadest spectrum of perspectives.

Next, a comprehensive study of company documents and records was performed, including a review of the training materials used for onboarding and ongoing employee development, recruitment videos, the company handbook, and other communications between leadership and employees. I had access to the results of a client firm engagement study performed by an impartial third-party consultant firm and a Harvard Business Teaching Cases Study, both conducted in Q1 of 2021. Finally, I conducted several virtual field observations that included attending Motivational Monday sessions and agent Focus Groups and several impromptu conversations with Chime leaders. As a case study relies on multiple sources of evidence, triangulating data from these sources supported a rich understanding of the phenomenon.

IV.3 Data Collection

Conducting interviews, attending Motivational Monday Meetings and other virtual meeting observations, and participating in employee engagement focus groups were the vehicles used to collect primary data. To collect secondary data, I analyzed the following sources: the monthly Chime Times, firm newsletter; the Chime Solutions website, The Employee Guideline Policy, New Faces communication; the iLead training materials; and the You Earned It (YEI) company rewards platform. I was also provided access to a confidential client engagement study ordered and paid for by Chime Solutions and performed by an impartial third-party consultant firm and a Harvard Business Teaching Cases Study. Both of these were conducted in Q1 of 2021.

Individual, in-depth, semi-structured interviews lasting approximately 60 minutes were conducted with 18 individuals in each of 6 different groups at Chime Solutions, depicted in Figure 7. Interview groups are listed and described in Table 3.

Table 3: Interview Groups

Group #	Group	Group Description	# Interviewed
1	Tenured Senior leadership at Chime Solutions	These leaders at Chime Solutions have five years or greater employment with the firm and include the founder and CEO.	5
2	New Senior leadership at Chime Solutions	These leaders are new to Chime Solutions with less than one year of employment with the firm.	4
3	Tenured Middle-Level Managers	These leaders at Chime Solutions have five years or greater employment with the firm and lead teams in the middle of the organization's hierarchy.	1
4	New Middle-Level Managers	These leaders are new to Chime Solutions with less than one year of employment with the firm and lead teams in the middle of the organization's hierarchy	2
5	Tenured Chime Solution employees	These are entry-level, hourly employees with more than six months of employment with Chime Solutions.	5
6	New Chime Solution employees	These are entry-level, hourly employees with fewer than six months of employment with Chime Solutions.	1

Interviews are a critical source of data collection as individuals' attitudes and behaviors are constructs that are not easily observed. Through interviews, individuals express their subjective perceptions and attitudes (Van de Ven, 2007). All interviews sought to provide insight to the research question, specifically the leadership actions taken to communicate and socialize culture to employees. Additionally, to uncover how employees responded. The research endeavored to ascertain if Chime employees embraced and embodied the focal firm's culture and values and how they felt about their relationship with the client they represent.

Eighteen interviews provided the opportunity to obtain the broadest understanding of how firm culture is communicated and socialized by the leadership and how employees experience it. Interviews were conducted until I reached information saturation and received no new information from the interviews. All research was completed through the examination of documents and interviews conducted by phone. In-depth interviews provide invaluable data because identification is revealed through language. Interviews were successfully used to gather insights into the process of identification (Press & Arnould, 2011).

Individuals interviewed from Chime Solutions are categorized into one of six groups based on proximity to organizational culture and organizational tenure. Figure 7 illustrates the six Chime Solutions groups. The vertical axis indicates Proximity to Organizational Culture from "Low" to "High." The horizontal axis indicates the continuum of tenure – depicting low tenure on the left to high tenure on the right.

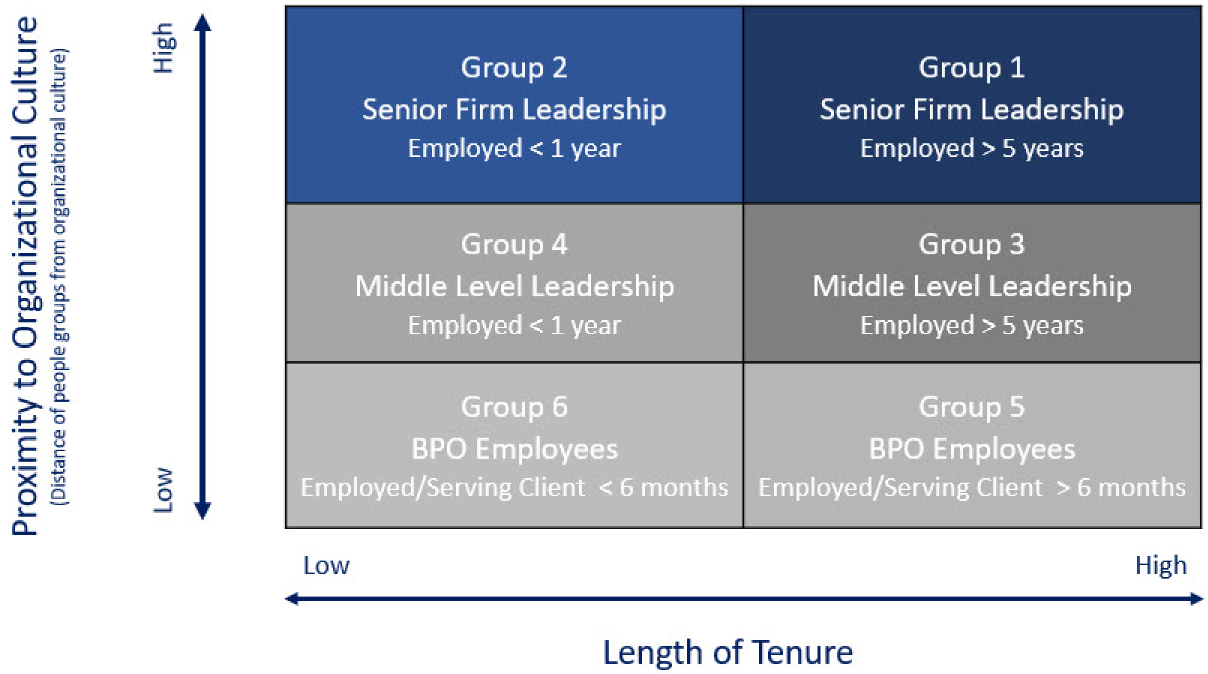

Figure 7: Interview Groups

To gain a firm understanding of the current process, interviews began with the first group of individuals – Tenured Senior Leadership at Chime Solutions (Group 1). This group is depicted in the figure in the top right quadrant of Figure 7. Five leaders were interviewed, including individuals occupying the following organizational roles: Chime's CEO, the Chief Strategy Officer, the SVP of Operations, Employee Engagement Officer and Site Director, and Chief of Staff. All individuals currently serving in these roles have a minimum of five years with Chime Solutions and have intimate knowledge and understanding of Chime's Organizational culture. These employees also all worked together at a previous firm owned and operated by the same founder in the same industry. It is important to recognize that tenured leaders, the CEO included, have likely thoroughly acculturated with the firm's organizational culture and embody basic underlying assumptions regarding culture, which are unconscious, taken for granted beliefs and values that determine behavior, perception, thought, and feeling. The placement of this group on the figure indicates high tenure and high proximity to organizational culture. This group sits closest to the firm's organizational culture as they are, in fact, the keepers or primary influencers of the organization's culture.

The second group of individuals interviewed includes New Senior Leaders at Chime Solutions (Group 2). This group occupies the top left quadrant of Figure 7. Individuals serving in the following roles were interviewed: Director of Learning and Development, VP of Marketing, VP Operations, and a Site Director. The individuals serving in these roles are relatively new to Chime Solutions, employed less than one year at the interview time. As newer senior leaders at the firm, these individuals provided a different perspective than their tenured counterparts who grew with the firm from early in its inception. The individuals in this group are in proximity to the organizational culture. Their role as leaders is to ensure the organizational culture is effectively shared with Chime employees; however, they may provide a different perspective because they are relatively new.

The third group included one tenured Middle-Level Manager (Group 3). This individual offered much insight because while she was a tenured manager, she began her career with Chime in Morrow, Georgia, as an agent before relocating to another of Chime's locations to advance her career and related to both the employee and manager perspectives. This group occupies the middle right quadrant in Figure 7 because while this individual has tenure with the organization, she is also only one step away from the senior leaders who create and model the organizational culture.

The fourth group of interviewees included two new Middle-Level Managers (Group 4). These individuals served in Assistant Director roles and had been employed with Chime for about one year at the time of the interview. This group occupies the middle left quadrant in Figure 7 because while they are still considered new with the organization, they are only one step away from the senior leaders who create and model the organizational culture. Individuals in this group should have easy access to senior leaderships messaging as it is their responsibility to, in turn, share the messaging with employees.

The fifth group of interviewees includes tenured Chime employees (Group 5), individuals employed at Chime Solutions for greater than six months, who have served as a single client's agent for greater than six months. This group occupies the bottom right quadrant in Figure 7 because while they have tenure with the organization, they are the farthest employees away from the leaders who create and model the organizational culture. These individuals are front-line employees who are serving as a representative to one of Chime’s client firms. This group provided perspective describing how they had been exposed to Chime’s organizational culture. The researcher learned if they embraced and embodied it, and if so, how and why. In a pre-Covid-19 world, these employees worked at one of Chime’s three contact centers situated in Atlanta, GA, Charlotte, NC, or Dallas, TX. They have since begun to operate remotely as they continue to serve and represent their client firm. The access to firm artifacts and culture, including the involved company founder, may have aided acculturation. Because these individuals have been employed with Chime for greater than six months, it is likely that they have had personal interaction with Chime’s founder and CEO and have had opportunities to observe company ceremonies, rituals, and business practices. In addition to learning how Chime employees have acculturated with Chime’s culture, the research aimed to understand how employees balanced the client's culture for whom they act as an agent. It sought to learn if the employees acculturated with that client’s organizational culture or experienced identification confusion.

The sixth group of interviewees includes new employees of Chime Solutions (Group 6), individuals hired within six months of the interview, and who have served as the agents for a single client during that time. The purpose of interviewing members of this group was to understand how they learned about Chime's organizational culture and if they have identified with it, embraced, and embodied it. Because these individuals have been employed for fewer than six months and on-boarded somewhat in parallel with the global pandemic brought about by Covid-19, these individuals had to pivot to remote working conditions early in their company tenure or on-board remotely to adhere to social distancing practices. For that reason, it is practical to assume that these individuals have had little personal interaction with Chime's founder and CEO and fewer opportunities to observe company ceremonies, rituals, and business practices, particularly in a face-to-face context. Understanding if and how these individuals acculturate or believe they are currently acculturating with the organizational culture of Chime Solutions and the Chime Solutions' client for which they serve as an agent provides a fascinating insight into the role proximity plays in acculturation.

In addition to interviewing individuals based on their tenure with Chime Solutions as detailed above, all possible steps were taken to select a cross-section of individuals who spanned all employment levels with Chime Solutions from entry-level employee to senior leader. Additionally, care was taken to ensure that individuals represented Chime's three locations, Morrow, Dallas, and Charlotte. This proved to be more difficult than initially thought. The location representation of the 18 interviews is shown in Table 4.

Table 4: Interviewee Categorization

Location				Tenure			Hierarchical Level			
Morrow	Dallas	Charlotte	Total	Tenured	New	Total	Senior	Mid-Level	Employee	Total
11	6	1	18	11	7	18	9	3	6	18

It proved much easier to obtain agreement and time from the senior leadership, which primarily reside in Morrow, than from off-the-clock, entry-level employees who interviewed outside of their paid working hours. Interviewee selection began by pinpointing the key senior leaders who best represented the tenured and new groups at Chime. All but one responded and participated in the interview process. The Senior Vice President of Operations helped connect me with individuals who would be most representative of all three locations and categorized by new and tenured groups at all levels. Participants were selected to be invited based upon tenure, location, and perceived likelihood to participate. I further solicited additional participation by asking participants if they could recommend other individuals who might be willing to participate in the study. Of the 40 individuals personally invited to participate in this study, 22 declined, and 18 accepted. No compensation was offered to participate, and no negative repercussions were experienced for declining to participate.

New employees were the most challenging group to recruit as many were overwhelmed with starting a new job, working remotely, and dealing with children and other home-based responsibilities brought on by the 2020 Covid-19 pandemic and other general life circumstances. While it was challenging to obtain the desired number of individual participants from this group for one-on-one interviews, I was invited to attend a focus group designed to gauge employee engagement that individual employees participated in during their standard paid work time. I was invited to pose questions to the group at that time which provided an acceptable substitute to gaining additional one-on-one interviews. Focus group participants were given the freedom to openly share their experience at Chime and their engagement level with its culture. One potential limitation of this experience was that there was a senior executive in this meeting. While this could affect employees' proclivity to share openly, most focus group participants choose to share transparently during this time, even though they were not required to do so.

Following the focus group, I invited each group participant for a further one-on-one interview, but all declined, mostly citing childcare issues. This response was not surprising as recruiting hourly employees to participate in what they may deem as a "work-related" activity after paid hours during an unprecedented and challenging time of the 2020 pandemic is understandable.

To conduct interviews, the researcher used one of two video conferencing platforms, BlueJeans and Zoom. All interviews were conducted virtually to abide by the strictest health and safety recommendations. Once participants were initially contacted and invited to become part of the study, they were asked to select a time that worked best to speak with me. After the time was agreed upon, I sent the interviewees a meeting request with a video conference link. This was an ideal way to ensure my cell phone could record the interview as a backup for the video conference.

Each interviewee reviewed the Interview Consent Form, signed it, and returned it. Each form was securely filed to protect interviewee identities, and interviewee information was logged in the Case Study Database. Each interviewee was assigned a unique identifying number. I began each interview with a brief recap of the study's purpose and answered any interviewee's questions or concerns. Each interviewee was informed of my intent to record the interview and take notes during the session. All interviewees used the video link, but most employees did not use the video option and opted for only audio. This was because many of them used their phones rather than their computers to communicate with me. Most of the senior leadership used video, but a few opted for audio-only.

After each interview, the recording transcript was uploaded to a transcription website that used AI to complete the transcription. This provided a rough transcription that required significant editing. While there were more expensive, non-AI options available for transcription, I consciously decided to use this platform for two reasons. First, it was the quickest and least expensive transcription service. Second, and most importantly, it provided a basis for the transcription but required me to re-listen to each interview while reviewing the transcript, which aided with data analysis and is consistent with the recommendations of seasoned qualitative researchers (Miles, Huberman, & Saldaña, 2020). Each transcript was edited for accuracy and adjusted to correct any AI mistakes, and then the document was exported and saved to a secure folder accessible only by me. All interview files were then uploaded to Nvivo for analysis. The Nvivo file is also stored in a secure and password-protected location.

I had the opportunity to attend several "Mark's Motivational Monday" events virtually. These events are held monthly; they are strictly voluntary and open attendance for all company employees. The firm CEO led these events, and participants were encouraged to engage in an open dialog and discussion rather than one-way communication from the CEO. Each event lasted approximately 30 minutes and while some participants joined late, rarely did anyone leave the meeting early, which was easy to track on the Zoom meeting. Attendance for these events totaled about 40 individuals and topics centered around personal and professional improvement. All participants attended virtually using audio-only, and I observed all interactions, recorded the meetings, transcribed them, took notes, and created memos in Nvivo following the events.

To ensure rich and reliable data and address construct validity, I collected and analyzed Chime's monthly newsletter, the Chime Times, the firm's website, the Employee Guideline Policy, the New Faces communication, the iLead training materials, and the You Earned It (YEI) company rewards platform in addition to primary data. I also examined a confidential Chime Employee engagement study performed by an impartial third-party consultant firm and a Harvard Business Teaching Case Study. Both of these were conducted in Q1 of 2021 and helped triangulate data.

All data was imported and stored in the case study database, where it was maintained to address reliability. Each source was saved in a secure folder and analyzed to understand the firm better and discern if the information gleaned from the primary sources, including the interviews, focus group, and regular meetings was congruent with the written communication used by the firm. As data was collected, memos were created in Nvivo to capture essential points and triangulate the findings. A separate password-protected Excel spreadsheet assigned a unique identifier to each piece of data and tracked each data source to correlate it to the information uploaded to Nvivo to maintain a chain of evidence. Yin’s four principles of data collection were employed and are summarized in Table 5.

Table 5: Yin's Four Data Collection Principles

Principle	Tactic

Use Multiple Sources of Evidence	• **Primary Data**
	  • 18 In-Depth Interview
	  • Virtual Observations
	  • Motivational Mondays
	  • Focus Groups
	• **Secondary Data**
	  • Multiple issues of Monthly Chime Times, firm newsletter
	  • Chime Solutions website
	  • Employee Guideline Policy
	  • New Faces communication
	  • iLead training materials
	  • You Earned It (YEI) company rewards platform.
	  • 3rd Party engagement study
	  • Harvard Business Teaching Cases Study

Create a Case Study Database	• Excel File which contains the following (PW Protected)
	  • **Interview Log**: Interviewee records (Name, interview date, status, position, tenure, unique identifier)
	  • **Article Log**: All research articles and books
	  • **Document Log**: Links to online resources
	  • **Observation Log**: Includes each observation details

Maintain a Chain of Evidence	• Interviews, memos, documents, observation notes al stored in an NVivo file
Exercise Care When Using Data from Social Media Sources	• No social media used

IV.4 Data Analysis

To begin the data analysis process, explore all themes and ideas, and ensure internal validity, I employed a concurrent data collection and data analysis process examining data both deductively and inductively. Concurrent data collection and analysis is recommended as it helps a researcher cycle back and forth between thinking about the existing data and generating strategies for collecting new data (Miles et al., 2020). Interviews, company documentation, training materials, and observation notes were imported into Nvivo as they became available, and this tool helped in the analysis process.

I considered the possible analysis strategies and employed the “ground up” analytical strategy recommended by Miles in exploratory research (Miles et al., 2020). As part of the cyclical process of data collection and analysis, I began early in the data collection process with a provisional coding list deduced from the themes captured in the conceptual framework developed from the examination of Organizational Culture, Organizational Control, and Organization Identity theories, as well as from the literature, and the interview protocol which was designed to discover findings that answered the research question. Because the research question sought to understand how and why employees identify and acculturate with the focal firm while balancing the tension of the client's culture, it made logical sense to begin with the individual parts of the process. Using theory in the analysis of data also strengthens the external validity of the research. The provisional codes helped to initially categorize the findings and map the data to the research question at a high level. These codes included: Firm Culture (Artifacts, Espoused Values, & Underlying Assumptions), Leadership Direction, Employee Response, Leadership Evaluation, Employee Identity, Firm Identity, Employee Values, and Client Inputs.

As the interviews progressed and secondary data sources were analyzed, the original list of provisional codes was expanded and changed, and additional first cycle codes were induced from the data. Both Values and Emotion coding techniques were employed to build the first cycle coding schema from the emerging data. After pouring over the collected data, I began to recognize concepts, themes, and patterns. Coding was an iterative process that took significant time and effort and resulted in 59 first cycle codes (see Appendix A). Developing codes is a painstaking process because they serve as the “critical link” between data collection and their explanation of meaning (Miles et al., 2020). They are the way data is categorized together, and they help to tell the story based on the data (Miles et al., 2020). As concepts continued to emerge from the data, it prompted me to delve deeper into specific questioning lines in subsequent interviews. First cycle coding enabled me to summarize the vast amount of data, over 18 hours of recorded interviews and 200 pages of single-spaced transcript, into manageable pieces. When the emergence of new concepts waned, I determined the study had reached data saturation.

After completing the first cycle coding, I engaged in second cycle coding. By evaluating common threads throughout the interview transcripts and the secondary data, patterns began to surface. Second cycle pattern codes help curate the first cycle codes into more meaningful topics, and they typically consist of four interrelated summarizers: categories or themes, causes/explanations, relationships among people, and theoretical constructs (Miles et al., 2020). In this study, the coding process led from 59 first cycle codes to identifying seventeen second cycle codes. From these seventeen second cycle codes, five key themes developed, as shown in Table 6.

Table 6: Themes and Second Cycle Codes

Firm Culture	Leader Characteristics	Leadership Actions	Employee Experiences	Identification & Acculturation Factors
• Family-Oriented • People-Centric • Missional • Community-Focused	• Bought-In • Servant Leader • Relatable • Caring • Encouraging • Accessible	• Communication • Rewards/Incentives • Personal Connection	• Sense of Care • Shared Values	• Employee Barriers • Client Firm Inputs

Through the data analysis process, themes were extracted and used to develop a conceptual framework backed by the findings in the data. Conclusions were drawn, and propositions addressing the research question were created. Throughout the research process, engaged scholarship principles were employed, and careful consideration was given to Construct Validity, Internal Validity, External Validity, and Reliability (See Table 7).

Table 7: Reliability and Validity

Construct Validity	Internal Validity	External Validity	Reliability
• Multiple sources of evidence • Manuscript reviewed by key informants for accuracy	• Concurrent data collection and analysis	• Use of theories in a single case study	• Use case study protocol • Develop a case study database • Maintain a chain of evidence

V RESULTS

Through extensive qualitative research, I sought to discover how individuals employed by one firm but who support a client firm full-time for an extended period identify and acculturate with the focal firm. To understand this phenomenon, I combed through hundreds of pages of company documents and artifacts, observed virtual meetings and focus groups, and conducted 18 semi-structured interviews with focal firm employees, which resulted in over 18 hours of recordings and translated into about 200 pages of transcribed pages of data. The goal of this extensive research was to answer the research question posed at the beginning of this study which is:

> *How does a firm successfully balance the tension of acculturating its employees with its firm while equipping them with the needed processes, procedures, and cultural elements of a client firm when the employees work full-time for extended periods supporting a client firm?*

The findings show that for a firm to successfully acculturate its employees to align with its culture and values when the employees work full-time for extended periods supporting a client firm, the process begins with a strong firm culture and leadership buy-in at every level. These factors drove leadership actions that contributed to employee identification and acculturation. The process was strengthened or weakened by employee experiences and other identification and acculturation factors, including employee barriers and client firm inputs. The research findings are divided into five sections: Firm Culture, Leader Characteristics, Leadership Actions, Employee Experiences, and Other Identification and Acculturation Factors, including Employee Barriers and Client Actions. The process begins with the firm and its leadership.

V.1 Focal Firm Culture

This study's focal firm is Chime Solutions, a Business Process Outsourcing firm that employs individuals and assigns them to a single client full-time for an extended period. Before understanding the relationships between players in this research, it was first important to understand the focal firm culture from leadership and employees. The organizational culture at Chime Solutions was found to be strong and healthy. Gleaned through interviewing leaders and employees at Chime Solutions, the culture was overwhelmingly described as family-oriented, people-centric, community-focused, and missional. Research indicates that employees who see a future with an organization, who are treated like family, and who experience genuine holistic care for them as an individual from the firm leadership as demonstrated in the Clan mechanism, may be more eager to identify and acculturate (Ouchi & Jaeger, 1978).

In this study, 14 of the 18 individuals interviewed described the company as a place with a strong family atmosphere, referencing family more than 35 times when describing the culture they experienced at Chime.

> *"I connect to the culture because I know that there's a lot of team chemistry and it's a family." (Tenured Senior Leader)*

> *"It is like home, just like family." (Tenured Employee)*

> *"We have had some people come and go, but it is like family. When someone leaves, it hurts. You're happy for them in the sense that maybe they have a better opportunity, but I really can say that that's one of the things you look forward to is if you have a good rapport with your co-workers." (Tenured Employee)*

> *"It's kind of like a family culture. So, everyone, they know each other. We connect not only professionally but even on a personal level, just so that we can build that loyalty and the trust, just as it is within a family, and we try to do that. My goal is to try to do that on every level. So from my position all the way down to the agents, it is building up that family culture and environment and letting everyone know that you feel comfortable with going to upper leadership." (New Senior Leader)*

Much like a family, the culture was described as a team where everyone builds each other up, and everyone can win. Despite tenure or level, managers and frontline employees alike overwhelmingly described the firm as having a sense of family. Two separate interviewees – one supervisor and one employee, described the concept of "Ubuntu" to me. An old South African proverb, Ubuntu encompasses togetherness, respect, joint purpose, kindness, and relationship. The Ubuntu bond was strong on the team, and the team fully embraced this concept going as far as creating and wearing t-shirts with the Ubuntu moniker (See exhibit A). This demonstrated strong acculturation to the team and connection to the greater culture at Chime.

> *"We focus on trying to have everybody be successful and have the organization be successful as a result of the individuals on our team achieving success, and so I think that that creates a supportive family feel in our company." (Senior Leader)*

> *"I would say the culture of Chime is one of family. I know here with my team, we manage with a philosophy, UBUNTU. This is a South African philosophy that says, I am because we are, that my humanity is rooted in my relationship with Chime, how we treat one another, how we care for one another, respect. And we manage with that principle that philosophy day over day. Our culture is about family closeness and accountability." (New Middle Manager)*

> *"UBUNTU is the belief that we are defined by our compassion and kindness towards others. You can't say anything to us about Mr. [supervisor], and you can't say anything to him about us because we know who each other is. And you know that is so helpful on days when you just don't feel like trying - you're going to do it. He raised us like family." (Tenured Employee)*

Another sign of strong culture is the focus on people. This was evident from senior leadership and the apparent care, concern, and desire for people to continually improve their lives from the CEO. Most interviewees, both leaders and employees, reported that the company is people-centric and while it is a for-profit business that needs to generate income to enable business growth, people are the greatest and most valuable resource. Eight interviewees commented on the people centricity of the company 19 different times.

> *"It is people-centric; we get in there, and we learn about the people that work under us, beside us, above us. It's a very people-centric company that cares so much about their employees that I've never seen anything like it." (Tenured Middle Manager)*

> *"I think at the heart of everything we do is people. And that drives a lot of our decisions." (Tenured Senior Leader)*

Employees shared that the company had a different feel – different than other places they had worked in the past. Positive experiences were shared in the interviews demonstrating the people centricity of the firm. When asked if the espoused value of people centricity was the observed behavior, I was provided with examples of care shown at the beginning of the pandemic as the business quickly had to pivot to stay in business and keep their employees employed.

> *"I would say when this pandemic hit, they started doing things to try and get us involved in and outside of work, you know, with the [virtual] parties and things of that nature." (Tenured Middle Leader – former agent)*

> *"Our product is our people. So we need them to come to work, and we need to be able to help them with anything that's, you know, their life challenges if we can." (Senior Leader)*

> *"I will share a conversation I had with one of the agents... She said, 'You know, I'm really appreciative of being able to work from home. Prior to this pandemic, I really took this job for granted. I didn't care - I was like, I'll just get a new job. And for Chime to be able to get us in a position where we can work from home, I'm very appreciative of it.'." (New Senior Leader)*

While most employees shared positive experiences of the focal firm's people centricity, one employee shared that he believed something was missing. When pressed to identify what it was, the interviewee expressed uncertainty and shared a feeling of incongruence between a culture espoused to be people-centric with a reality where the interviewee felt that clients were "always right" and believed placed at greater concern than the employees.

"Like at any minute, I could lose my job if the person on the other end didn't like me. And that made me feel that [the firm] is more client-focused than employee focused." (Tenured Employee)

This response was an outlier in the interviews, and later in the same interview, some attributes pointed to potentially a fixed mindset which emerged and is detailed later in the findings.

The third theme that emerged from the research was the strong emphasis on community. Half of the interviewees referenced the firm's community focus a total of 12 times.

"What I love about Chime is just the story and how we are going into different communities that could really use a boost and giving a bunch of individuals a great opportunity for a career and a good job. So just the overall vision and mission and what Chime does for individuals in those communities -- that's something that I can really rally around." (New Senior Leader)

"The social aspect differentiates us from a lot of other big call center, outsourcing companies. We're trying to act as a change agent. That change agent allows big companies like [X] or [Y] to effect change distressed communities through relationships with companies like ours. We are the connection for a big company to have that impact in our communities." (Senior Tenured Leader)

"It sparked my interest that an African-American man would invest in the community like that to build the community up because that's the type of person that I am." (Tenured Agent)

Leadership and employees alike shared how the focus on the community drew them to Chime. Research has indicated that organizational identity may be associated with shared values, beliefs, and the firm's mission, and a strong culture increases the likelihood employees identify with it. (Ashforth & Mael, 1989). Chime's focus on the community struck a chord with firm members.

The last dominant theme that emerged and provided evidence to the strength of the firm's culture was an inspirational mission. The company's vision is to transform service and empower lives, and they execute that through their mission of challenging the outsourcing status quo by redefining customer care as a service through its socially driven mission, enabling our clients to succeed and communities to thrive. When asked more about how that presents at the firm, interviewees shared,

> *"One of the things that our CEO does that is great is he's very clear about what the mission is, what our goals are because it's not like we're running a non-profit here. We're still a viable company looking to earn. However, we have a mission as well, and it's fulfilling that mission, so there's a delicate balance." (New Middle Leader)*

> *"When I think of Chime, I think of our CEO and his leadership style, which is... 'I have this amazing idea. I want to put jobs in under-served communities, and I want you guys to help me do that.'." (Tenured Senior Leader)*

> *"I believed in the mission, and I would have come on board to do anything. I would be the janitor as long as I would get to touch other people and show them the opportunity." (New Middle Leader)*

> *"They just want to bring, you in and it makes you feel like you're like family. To bring you in and build you up and not put you down. To make you not feel like you are just here to be here. You're here for a purpose." (Tenured Employee)*

The culture at Chime Solutions was shown through these empirical findings to be strong, with specific themes focused on the family atmosphere, people centricity, community focus, and inspirational mission. This was important to understand at the outset of this research as knowing that the focal firm's culture was strong could impact how the employees identify and acculturate with the firm.

V.2 Leader Characteristics

Another important theme that emerged and strengthened the identification and acculturation process was leader characteristics. Leadership refers to a process of influencing the members within an organization to achieve organizational objectives and can influence the attitudes and behaviors of its members and their interactions (Kyongmin et al., 2018). References were continually made to servant leadership, relatability, care, encouragement, and accessibility when referring to leaders at this firm. These essential characteristics that continually were referenced both by leaders and employees point to the over-arching theme of "leader buy-in." Findings showed that leadership was strongly "bought-in" to the firm culture and values, strengthening the propensity for the leaders to act.

I asked leaders at every management level if they believed in the culture and embraced and embodied it. This was important to establish and confirm to understand better how their actions of communicating and socializing it to firm employees might encourage identification and acculturation. While managers were quick to share that Chime was not perfect and certainly not without fault, responses were positive from all senior leadership and most middle leaders when asked to share their engagement with the culture. Multiple leaders expressed an enthusiastic passion for the culture, values, and mission of the company.

> *"I love it. I love it. The mission of Chime is parallel to my own. I love the work that I get to do. I get to touch lives. I get to help change and influence lives. What we do is hard. I have likely lived half of my life, and I'm in a place now where it's not so much about the dollar, as much it is about the mission." (New Middle Leader)*

> *"I would be hard-pressed to find anything anywhere else where I could get more bought into a culture than I am at Chime. I love the individuals I work with, and I love the active leadership by everyone. Everyone I'm working with truly cares." (New Senior Leader)*

One senior manager became emotional as she shared how closely she identified with the culture.

> *"I may see the culture and vision differently because the people we lead are ME. And so when I think about our culture, it's not just about providing a service to clients and that it's doing that with a vision and a purpose to execute something else great for our employees. This question really hits me hard as I start to talk to you about it as I hadn't really put this all into words before now. So now, for me, it's so much bigger than just standing up a new client and hiring seven hundred agents, but we actually have an opportunity to make a difference in those lives and the lives of the people that they lead generationally. So it's huge. For me, it's big." (New Senior Leader)*

These individuals were self-defined as "bought-in" to Chime and its mission. Research indicates that individuals who identify in family firms often seek meaning related to ethical conduct and quality rather than solely economic performance (Elsbach & Pieper, 2019), which was undoubtedly the case here. Extant research also shows the criticality of supervisors "buying into" the organization's values and goals to encourage their direct reports also to do so (Ryu, 2015). When asked to gauge leader buy-in overall, one senior leader did not skip a beat before responding,

> *"1000% bought in [to the culture]. It is obvious to me those that are not bought-in because you can see the tendencies. You can see the reaction to the intensity that comes in our organization. We have a very fast-paced -- a very demanding work environment. No one is signing up for that if they're not bought-in." (Tenured Senior Leader)*

Another employee echoed the importance of cultural buy-in by leadership.

> *"One of the things you hear from [our founders] all the time is we have to get the right leaders in place that understand our vision and what it's going to take to accomplish both objectives: the service that we provide to our clients, and the support that our agents need. I think you have to have leaders in place that understand that." (New Senior Leader)*

> *"There are some leaders who certainly identify with Chime and are here because they love the mission." (Tenured Senior Leader)*

> *"I definitely think the starting point is having it be top-down. I think if your senior-level leadership has not bought in, then I don't think it'll ever have the chance to trickle down." (Tenured Senior Leader)*

Extant literature indicates that leaders must buy into organizational values and goals and encourage their employees to do so. If the leader is not aligned organizationally, employees may receive mixed messages and become confused about their roles and missions. Thus, organizations must train leaders to buy into organizational visions or goals to be "on the same page" as their organizations (Ryu, 2015). These initial findings empirically indicated that the focal firm culture is strong and that the leaders are "bought-in." This was necessary to drive leadership actions.

V.3 Leadership Actions

The research illuminated leadership actions that drove employee identification and acculturation with the focal firm. The leadership actions identified include the following: Clear communication of roles and management of the focal and client firm relationship; clear and consistent communication at all leadership levels; communication of incentives, connection, and growth opportunities; sharing personal stories; and development of strong supervisor/employee relationships. When these leadership actions were executed well, it drove employee identification and acculturation with the focal firm.

V.3.1 Communication and Management of Roles

First and foremost, it was apparent that to encourage identification and acculturation with the focal firm, it was incumbent on the firm leadership to define the roles of the focal firm and the client firm. Managing that relationship to facilitate clarity for employees and delineate the differences was paramount. Defining and managing the roles included ensuring employees understood how the focal company worked and partnered with clients to provide them with the best service. It also entailed ensuring employees understood the escalation path for questions and concerns. The relationship between the focal firm and the client firm could seem unclear if not explicitly defined. The focal firm's goal is to acculturate its employees to feel like a valuable part of the focal firm while learning enough about the needed process, procedures, and culture of the supported client to provide excellent service. Through interviews and interactions with leadership, Chime management expressed the criticality of establishing the role the focal and client firms play in employees' relationships from day one. By making clear introductions during orientation and training, Chime and the client established a clear escalation path for new employees. They identified each employee’s supervisor at Chime and introduced the client firm's training individuals and client liaison. When inquiring how Chime mitigated the risk of employees experiencing identify confusion or ambiguity between the focal and the client firm, one senior manager responsible for training at Chime replied,

> *"We do run into that [identity confusion] sometimes, but I think the thing is the work we do in orientation and the reminders from the trainers explaining who their escalation people are, helps. One of the things that we've been trying to do lately, we've tried it with some clients, and it seems to be working better is having the managers in the classroom with the agents so that if the manager is in the classroom, they have a clearer understanding of who they report to. In many cases, the managers train right with along with the agents." (New Senior Leader)*

> *"Sometimes confusion can occur depending on who leads your initial training. Sometimes we have Chime business instructors, and then sometimes we have client business instructors and then for client-specific training; most of the time, that's usually the client leading that training. It depends on how connected you are and who you are reaching out to. We try to paint the picture for who they [the employees] should be reaching out to for different things so that we don't get into co-employment issues." (New Senior Leader)*

Another leader referenced the need for the connection and relationship between the leader and the employee to ensure they are clear on the employing firm versus the client firm they serve.

> *"If managers are not well connected to employees, then I can easily see where they're feeling like they're getting more support from the client in their day-to-day chat than from their manager connections, then that's where it could sway." (New Senior Leader)*

Identifying with the client firm is not an undesirable thing for employees to do. When employees identify with the client firm and the focal firm, it can result in positive outcomes both for the employing firm and the client. Extant research indicates that an individual is strongly identified with an organization when his identity as an organization member is more salient than alternative identities (Dutton et al., 1994). Dual acculturation only becomes an issue when the employee identifies and acculturates with the client firm at the expense of their identification with the focal firm; for example, if the client identification becomes the more salient identity for the employee. Individuals have limited identification bandwidth, meaning that identifying with one firm may cause them to have less capacity to identify with the other. Because it is Chime's goal to build a strong culture with a mission to serve the community and its employees, Chime strives to promote strong identification by acculturating its employees so that employment relationship and cultural identification is the strongest. When communication is strong and the focal firm and client firm relationships are clearly defined, employees and leaders demonstrate the capacity to embrace and embody the focal firm's culture while still having a healthy connection with the client firm. From verbatims gathered through the research conducted by the third-party firm, a client was noted as saying,

"[Chime] leadership does a great job managing the client." (Third-Party Report)

Chime engagement from the C-suite down provides a level of comfort/reassurance." (Third-Party Report)

V.3.2 Communication at all Leadership Levels

Another finding that was detected through interviews was the need to ensure every link in the leadership chain was strong. It was not enough for the senior leaders to buy into the culture and share it with employees; it was necessary for the individuals who led others at every leadership level to have the same passion for the firm's culture. Clear and consistent communication and messaging transmitted through each leadership level ensured that all employees were exposed to a congruent cultural message. This finding was corroborated in the literature, which indicates that to establish and maintain a strong culture, leaders who have direct contact for periods of time can socialize the desired firm values (Selmer & de Leon, 1996).

When asked how communication at each level was accomplished, one leader shared,

> *"We're challenging our managers to be more creative in the way that they foster relationships and build culture. They have to utilize technology, their innate talents, their communication skills to bring it all together. So we don't feel like we're on an island trying to do something." (New Middle Leader)*

A new avenue that Chime shared to strengthen the culture network and undergird organizational efforts was to begin an Ambassadorship program that enlisted individuals who had "caught" the culture and were strong advocates. These individuals were referred to as "Chime Cheerleaders" and referred to as being "Chimed-in."

> *"I want to turn more Chime team members into brand ambassadors. I'm constantly thinking about ways that I can get people to feel like they belong. If I can get people to feel like they matter, that they're important... that the work that they do is important. All of it." (New Senior Leader)*

> *"The philosophy that I have as a leader in the company permeates through the rest of the organization for sure." (Tenured Senior Leader)*

> *"I think culture is felt more densely at the top. It is not as strong as you get further out because we're spread out so much. I think Chime ambassadors are to try to spread the [culture] message out around the whole Organization." (Senior Leader)*

While most interviewees believed that the cultural messages were clearly and consistently communicated at all levels of leaders to all employees, some acknowledged that more work was needed, and they shared how they coached their subordinate leaders to provide strong cultural messages in words and action to the teams they lead. Senior leaders shared the difficulty they face equipping Service Delivery Managers who are at the lowest rung of leadership directly supervising agents,

> *"Now I'll be completely honest and transparent, sometimes when you get to the service delivery manager level, depending on the skill level and their ability to connect with their agents or even to connect with people in general, that impacts how they manage and connect with their team." (New Senior Leader)*

> *"If I see the service delivery manager is disconnected from their team, that is something that we address. I just give best practices. I try to teach them to treat [their people] the way that I treat them. I try to teach them that if your agent calls*

you or they need to come up to the office, just be available the same way that I am when they call me at any given time of the day or night. I'm available for that. So I just try to demonstrate by example for those who have a little issue or who are challenged with being bought into the culture." (New Senior Leader)

Because culture is such a big part of leading at Chime, I inquired how people obtained leadership roles in the organization. Many are developed and promoted from within, while others come from outside of the organization, and they need to be acculturated to Chime. Promoting from within was a strength leveraged by Chime as these managers were already familiar with and bought into the Chime culture.

"The ones that are promoted from within, they are ready. They know the culture, and they already know the behaviors and the expectations. They hold you accountable because they know what it is like to be an agent." (New Senior Leader)

When Chime encounters leaders who are not embracing the culture themselves and then clearly and consistently communicating it, they resolve the situation.

"We've constantly had to evaluate based on feedback and observing managers that may not be in line with the mission that we're trying to achieve here. If you aren't aligned, that's fine, but that you just may not be a fit for Chime because we need people at that level more important than any other level [Service Delivery Manager] to be behind our mission. It is a constant check at each layer because it has to be a top-down approach, and if the most senior-level leaders are not relaying that message and communicating and having those conversations with their direct reports and all the way down, it'll never get down to the agents. I think it's a constant evaluation at every level to understand 'are these leaders behind what we're trying to do.'." (Tenured Senior Leader)

"With each leader over a specific client or customer, I just have to make sure they have that the vision that I have that they buy into that [greater mission] and communicate it." (New Senior leader)

The evidence indicated the importance of clear and consistent communication at every level of leadership within the organization. When there are weak links in the communication chain, cultural stories and messages are often lost. In this context of a disaggregated workforce, it was abundantly clear that the communication chain strength played a significant role in the identification and acculturation process. Ensuring the message was consistent helped ensure that each employee heard and experienced congruency at every leadership level.

V.3.3 Incentives, Connection, and Growth Opportunities

Another vital component of the acculturation process that emerged from the research was leadership sharing the message of "What's in it for you" to the employees. The firm carefully evaluates the incentives available for employees and uses those incentives to drive cultural connections. Sharing incentives demonstrates to employees that the firm's actions are congruent with its espoused values of care, fun, and service. If people indeed are the firm's passion, as the company claims, incentives are the actual practice through which the employees can see that come to life. Because the firm desires to care for the whole employee, the incentives are both tangible and intangible and are communicated in various ways to the employees. Extant research indicates that companies that place a high value on culture often consider the whole employee, including the employee's family and other interests outside the company, to build deeper personal connections (Pfeffer & Sutton, 2006).

In addition to fair compensation and the usual employment benefits, the firm follows the unusual practice of distributing paychecks weekly rather than bi-weekly. This request came from employees who shared financial needs, and the firm quickly implemented this practice. The firm uses incentives other than the standard compensation package to acculturate employees and approaches the use of incentives holistically through a two-pronged approach: Chime University and the Total Life Program.

Chime University exists to develop individuals professionally with various developmental opportunities including, Conflict Resolution, Management, and Customer Service offerings.

“Chime University provides these courses, skills, managerial skills, listening skills, how to manage difficult people, different types of modules. We create content and I think we also use a partner.” (Tenured Senior Leader)

Initially, many of the classes were geared toward individuals who were already managers, which is needed to ensure a robust leadership chain. However, employees' feedback caused Chime to add more classes geared toward individuals seeking management positions and other developmental opportunities. One leader shared how they use employee suggestions to drive course offerings.

“We got feedback when we first rolled out Chime University: ‘These classes aren't for me, you're talking about how to be a manager, and I'm not one. I want to understand the steps for me to better myself now so I can become [a manager’].” (Tenured Senior Leader)

The other avenue unique to the culture and evidence of the people-centricity is the Total Life program. This program is designed to meet employees where they are and help them to improve their lives overall. Workshops such as Credit Repair and Home Buying have ranked high on the list of desirable offerings for Chime employees, and all leaders are encouraged to attend and advocate for these opportunities. The purpose is for employees to grow personally and feel the organization's overall care for them holistically. Top leadership wants employees to feel the firm culture and the care and investment they make in them as individuals.

“I get employee feedback [when scheduling offerings]. I've noticed we have a lot of entrepreneurs at Chime right now, so we did a marketing class last night, and we try different things to kind of see what works and what doesn't.” (Tenured Senior Leader)

“We have a homeowner’s program to get people out of renting and into their own homes. I think right now, 18 people have successfully purchased their first home as a result of the efforts of the program.” (Tenured Senior Leader)

“For new hires is we do something called a ‘Success Roadmap.’ We do 16 personalities, so we understand your Myers-Briggs rating and how you fall into those categories. But we also do this video called "Why You're Here.” It is very real

goal setting and tying it back to your own vision and mission for your own life. And so I think in a culture like Chime, you have to go that much deeper to connect because it's not just about providing a service to clients and that it's doing that with a vision and a purpose to execute something else great for your employees, on the other end." (New Senior Leader)

Everyone agreed that the personal and professional development at Chime was desirable. However, one manager shared how he thought it might miss the mark and that there was still room for improvement.

"A lot of what we do just doesn't seem to resonate with people. We've offered beginners yoga. I've never done that before, and I sure as hell don't want to get on a webcam and try to do yoga -- that's a little scary. Running the same courses like dealing with difficult customers every month for four months is another thing. Once someone has taken it, the incentive for them to go again is less. A lot of what Chime's culture is about improving people's lives. So yoga, great I'm sure not a lot of people see the immediate benefits of improving your life with a beginner yoga class. And cooking class…the audience doesn't necessarily resonate with having to go out and buy a few chicken breasts and spend 40 or 50 bucks cooking this meal. A lot of what I personally would love to see is just development in terms of computer skills, interview skills, communication skills, resume building, and the actual tools that we use on a daily basis. That kind of stuff has an immediate impact." (New Middle Leader)

Chime leverages incentives, both personal and professional development opportunities, to invest in employees holistically. Chime espouses to be people-centric, and their actions through incentives are congruent with that value. These incentives are communicated clearly to employees and designed to drive employee identification and acculturation with the firm.

In addition to incentives, including developmental opportunities, Chime has used various connection opportunities to foster employee identification and acculturation. In keeping with people-centricity and family culture, the firm approaches connection through many channels and depends on these connections to cultivate increased acculturation. Based on the empirical evidence, this appeared to be an effective technique for aiding the acculturation of employees who spend most of their day surrounded by cultural artifacts of the client firm, which they support in their role. Chime leveraged a variety of connection opportunities which served to advance employee identification and acculturation. The five types of connection opportunities that emerged prominently through the research include Orientation, Recognition, Celebration, Service Activity, and Fun. To better understand the types of activities that each entailed and how they created connection opportunities at Chime, each was examined individually.

The first connection opportunity begins on day one when employees attend Orientation. Because the incoming employees need a solid introduction to the firm and clarity about the firm with which they are employed, the CEO or a tenured senior leader addresses each incoming group, welcoming them and introducing them to Chime's culture, mission, and values.

> *"My goal is to go to every training class that we have. I have certain things that I share with them about what our company intends to do where they're concerned and what our mission is and who I am and all that and that 30-45-minute conversation -- it's amazing. I don't have much day-to-day interaction with very many of the folks that work for us beyond that, but that meeting is so impactful because it's personal… I make it personal so that they feel like they have a personal connection to me." (Tenured Senior Leader)*

When the CEO was asked about the content shared on day one, he explained,

> *"There's a part of me that that's trying to transform the culture so that it fits our company mission. I'm trying to do different things that are going to cultivate a culture where it really is about community building. What I'm trying to communicate to the Chime team members is, take advantage of this. You have a company that's pouring resources into you. Take advantage of that." (New Senior Leader)*

Another senior leader shared the passion that came through to these groups when they heard from the CEO on their first day of orientation.

> *"It's interesting because typically that time is scheduled for 15 minutes, and if other [senior tenured] leaders do it, that's [all it takes]. But with [CEO], we always say [laughing] you better leave two hours." (New Senior Leader)*

This evidence is in keeping with extant research, which has shown that the founder plays an integral role in developing firm culture, and the culture can shift when the founder moves on (Aktaş et al., 2011). The CEO's involvement in designing and socializing the culture is significant in this case.

Another way to help employees feel connected to the firm on day one and add an element of fun to the orientation is when leadership gives each employee Chime "swag." These bags are usually filled with various items emblazoned with the Chime logo and are designed to imprint the brand in new employees' minds.

> *"In orientation, we do give out bags with Chime swag. That is obviously harder to do virtually." (Tenured Senior Leader)*

Chime uses Recognition as the second connection opportunity. The firm recognizes milestones and achievements of the employees each month to build the firm culture. A monthly newsletter called the Chime Times is published, and in it, they recognize "Shining Stars" for Perfect Attendance. Recipients are recognized by having a red-carpet event that is only open to members who receive this honor. For every perfect attendance month an employee has, they receive a half a day of additional PTO (paid time off).

Additionally, in the Chime Times (Exhibit B), you will likely see the New Faces (Exhibit C) piece introducing new employees to the team. This piece strives to build a connection by linking existing and new employees together. When asked about the perfect attendance red-carpet event, one interviewee shared,

> *We do this Zoom party situation with the leadership team for Perfect Attendance. We have what we call shining stars. Those are people that receive a 4.0 for the month. We have something called Chime score, and that's basically like their GPA as an employee. It's on a 4.0 scale. No matter your project, it kind of levels everybody out to the same standard of how they're doing. So we recognize those people on a*

monthly basis. If you get three months of shining stars - if you're shining star in the quarter, you become an MVP. So we have different prizes for those people. I would say that we don't lack recognition." (Tenured Senior Leader)

Another leader shared her innovative ideas for recognizing people at one of the call centers she managed,

"We introduced a program called Chime Elite [at my center pre-pandemic] – I am trying to re-introduce it virtually - any time anyone has good stats, and they made their metrics, or they had a compliment or anything that we could praise them for, we would make a huge deal about it, and then we had this big spin wheel in the middle of the call center, and they could come over and spin the wheel and win prizes. It also brought a lot of friendly competition between the managers and the agents. It was just a big deal to be part of the Chime Elite club." (New Senior Leader)

When asked about recognition, one employee shared,

"I like how they recognized you for certain accomplishments. Chime is good for recognizing good attendance; they're good at recognizing if you get a great call. You're recognized for your quality scores. You're recognized for basically everything you do; you're recognized if you dress appropriately. They give recognition for your birthday; they give recognition for your anniversary." (Tenured Employee)

Research also revealed that Chime highlighted employees and provided them with various opportunities to shine.

"I'm on the philanthropy committee. Georgia Power chose our CEO to do an interview for Black History Month, and they chose me to represent the agents, which was great. I was happy. It was a great experience because I had never done anything like that before and just the simple fact that they chose an agent or that they chose me, specifically, because they felt like I embody what Chime represents. That made me feel good." (Tenured Employee)

Interviewees also shared about a program Chime has called "You Earned It (YEI) (Exhibit D), which is an ongoing way to recognize and reward people. It is a platform where an employee or leader can award points to another employee or leader at any level, and it is a way of recognizing each other for doing something well. This is an exciting program as it allows peer-to-peer recognition, supervisor to employee recognition, and employee to manager recognition, so the recognition and appreciation go both up and down the firm's hierarchy. Individuals can use the points to cash them in for prizes, branded Chime swag and other items like gift cards from popular retailers.

> *"You receive points from your peers on different things like great customer service, and from your manager as well, and you are able to redeem those points for things -- we have a large amount of Chime branded things on there [to choose from]." (Tenured Senior Manager)*

> *"Everybody kind of gets to share in the experience of celebrating each other [through the YEI program]." (Tenured Senior Leader)*

> *"You get [points] when you get recognition for doing good things, and when you get so many points with the points you get gift cards -- right now I am liking Amazon and Wal-Mart." (Tenured Employee)*

The third connection opportunity that emerged from the study is celebration. Chime celebrates employees. This creates connection and enhances the previously discussed recognition by going a step further, celebrating each individual, and sharing life's events as a firm. This fosters a sense of belonging for the employees.

> *"They celebrate work anniversaries. They celebrate birthdays. They celebrate all milestones. I've been featured in a newsletter." (Tenured Middle Leader–former agent)*

> *"There's the Christmas party -- everybody looks forward to it. We all get a chance to dress up in our best and just come to have a very good time." (Tenured Employee)*

The fourth connection opportunity identified through the research is the way Chime uses Service as a connection opportunity. The firm organized a group of volunteers to join the philanthropy committee that works on service opportunities members of Chime can participate in to give back to the community. All are encouraged and welcome to join to build community. The interviewees described the way employees and leaders of the firm come together to do good for the community and how it binds them closer together by participating in shared experiences. When asked to share more about these events, interviewees described multiple service events they participated in.

> *"In November, we have our Chime walk. That's our walk where we raise awareness for the women's shelter, and we raise money" (Tenured Employee)*

> *"We adopt a family – maybe the family of an employee that's in need at the holidays. We do back-to-school drives where we bring in supplies for people that are needed within our employee pool. We have community events and support charities together." (Senior Leader)*

> *"I'm on the philanthropy program, so there's a lot of things that we try to incorporate like the school drives. We have a lot of company participation in a lot of things." (Tenured Employee)*

Fun is a value at Chime, and leadership ensures it is incorporated in their culture to connect employees to the firm and one another. This is the fifth connection opportunity that emerged from the research. Interviewees' voices grew lighter as they described the activities in place for them designed around fun. While leadership explained that fun has always been a core value, additional efforts were launched to increase connection, engagement, and fun since the pandemic forced employees to work from home in the last year.

> *"We do Instagram live parties. Now, in this virtual environment where we bring in a DJ and do different prizes and events online. Every year, we do a massive Christmas party. And this is a party that's black tie. Everyone gets dressed up. This is the first time most of our employees ever had a chance to put a gown on or a suit. A lot of times, people can't afford it, so we have clothing drives or rent a gown to help out. And they really look forward to this because it's time for them to get out and dress up and never really have an opportunity to do that." (Tenured Senior Leader)*

> *"Every month, we have some type of event. We might have a lunch day where lunch is catered, or your team did something, and we have a potluck. We'll usually have our Chime cookout. That's usually in July where Mr. Wilson will have all the grills, and the employees will be grilling." (Tenured Employee)*

> *"We have Spirit Week, just like you were in high school again, where you do different things. We have flip-flop day. We usually couldn't wear flip-flops at work or*

dress down in jeans, so it was fun to do those things. It was just like in high school again." (Tenured Employee)

"One day we might have a cookout, just a spontaneous cookout." (Tenured Employee)

The research illuminated the time, resources, and strategic effort Chime placed into cultivating connection with employees as a means of driving strong identification and acculturation with employees. The firm has shown to invest heavily in connection opportunities, and evidence of opportunities and activities in the form of orientation, recognition, celebration, service, and fun abounded throughout the research.

More than half of those interviewed mentioned experiencing personal growth over 25 times during the interview. Employees experience how leadership invests in growing individuals, which in turn motivates employees to identify and acculturate. Employees shared some of the ways they experienced growth at Chime.

"[Coming here] it was really not even about a job. It was about real growth, a bunch of growth." (Tenured Employee)

"I want a job where you can always grow. You don't have to be at a standstill. And I want to work for a company that cares about me. And excuse me for saying this, but not just an ass in the seat. Chime stacks up pretty good for growth opportunities." (New Employee)

"I'm a testament to what you can do if you put your mind to it." (Tenured Middle Leader – former agent)

"I'm noticing that working at Chime is helping me to identify certain things I may want to do [with my life]." (Tenured Employee)

The interviews provided evidence of how the leadership invests in the employees at Chime through development opportunities, and the employees indicated that growth opportunities appealed to them and connected them with the firm.

V.3.4 Personal Story Shares

Once leaders are "bought-in" to the firm culture and communicating to their teams, Chime believes it is critical to take it one further step to make it real for people. While sharing a verbal message is helpful, interviewees described that authentically sharing a personal story gives weight to the message. Leaders interviewed shared how they openly, emotionally, and authentically share their personal stories with their teams in cases where it was relevant and could be impactful.

One senior leader encourages new hires by sharing his journey from the projects of a large city in Arkansas to the success he has found as a senior executive and entrepreneur. He has found that sharing his story resonates with many new employees starting at the company and coming from various challenging circumstances and backgrounds.

> *"Some initial conversations [with new employees] get to be really emotional. It's not contrived is really real, because when I talk to them, I'm talking to them from a very personal place every time. No matter how many times I go through it, I see the different group as a different audience that I can have the chance to impact, and so I tell stories about my own upbringing and how it is that through maximizing opportunities that have been provided for me, that I'm in the place that I am and how they are as capable if they will just listen and take advantage of the opportunity that's been presented. They understand that at the senior-most level in the company that there's a real interest in what we're trying to do, which is at the end of the day is to support them." (Tenured Senior Leader)*

Another leader shares her compelling story with members of her team to encourage them and share the culture and mission of the firm.

> *"I say to them, 'I'm really just a 55-year-old version of you, and thankfully, I had people who invested in me, and I was able to take advantage of some opportunities, and I'm not any different or some special thing, so you can do it, too'—just providing that support. I think that's how we reach [them] and make that connection. I think you have to be real." (New Senior Leader)*

To achieve the level of cultural "buy-in" the company desires, the employees need to know that the leaders are willing to take the step to share authentically, to be transparent, and to remove the hierarchical barrier which could keep some from identifying with the culture.

> *"You have to connect for real, and I hear people all the time as leaders saying that they don't want to share their story. I'm a person that believes that is why it's my story - it is because I don't think I am the smartest person in the building, but I think we're put places for a reason, and people need our stories." (New Senior Leader)*

> *"We have to be transparent and share who we are and share our story and mission." (New Senior Leader)*

By sharing stories, the firm attempts to connect leaders and employees at all levels of the organization and build relationships. Building those relationships encourages individuals to feel "a part of" and thus identify. Storytelling was described by many of the senior leaders interviewed.

V.3.5 Strong Supervisor/Employee Relationships

Empirical evidence gathered through personal interviews showed that relationships in the workplace mattered significantly, and the relationship between an employee and his/her direct supervisor played a weighty role in the identification and acculturation process. Extant research confirmed this, indicating that the employee and employer's psychological bond is an important predictor of work-related attitudes and behaviors (Riketta, 2005). Examining this relationship, leadership shared how vital the link between the employee and the direct supervisor is in identification and acculturation.

> *"I think the most important relationship in our company to drive retention is the supervisor to agent relationship. Every supervisor has fifteen to eighteen people that they're responsible for, and they're dedicated to those people. We have to do a better job, and we really have to focus on developing those managers or frontline managers who may likely be the first time they have ever managed anyone and may only be just one step above the people that are actually doing the work on the phone, but that is the relationship. How well are you treating people? How well are you're communicating with them, how well are you representing them -- that relationship is*

> *really important. And I think that that drives a lot of our culture and values." (Tenured Senior Leader)*

Another senior manager described the criticality of developing the direct relationship between each employee and their supervisor at all levels to the top senior leadership level.

> *"You must have a personal connection. And then beyond that, it is not rocket science. It's the things that people don't feel like they have the time to do that you have to do." (Tenured Senior Leader)*

Leaders shared that resilience, passion, and authenticity are the qualities that are important to establish a deep relationship with the people they lead.

> *"It takes a resilient leader, someone who doesn't give up because it is challenging because you're breaking through cultural things that have been ingrained in people over the years, and it's hard. You're not going to be 100% successful with everybody, but by and large, you can set a culture where you have an endeared relationship between leadership and the people that work there." (Tenured Senior Leader)*
>
> *"Fatigue will set in without passion." (Tenured Senior Leader)*
>
> *"I think we have to come off the corporate seat of a vice president and be real for the people that we lead." (New Senior Leader)*

When supervisors invest in the employees they lead by building solid relationships, it was shown to have positive benefits for employee identification and acculturation. Evidence also indicated that this strong relationship was valued by employees and was noted 15 times through interviews. When employees shared a positive relationship with their direct supervisor, it intensified how they felt about the firm culture and increased their propensity to identify and acculturate with the firm.

> *"[My manager] really took time to know me; she paid attention to how I moved, what I did then and now, and what we could do to work on getting me better." (Tenured Employee)*

Another employee shared the deep relationship she shared with her supervisor and the significant impact that the supervisor had on her life. She described a relationship beyond what she expected from a work supervisor and described him as "going the extra mile" for her benefit.

> *"To have that type of supervisor there caring about your mental health and well-being -- just teaching you how to do the job better. When I look at myself and my team that came under [our supervisor], and I look at other people's team that came under other leadership... let's just say that you can tell that their supervisors left right at four o'clock every day after work and you can tell that our supervisor stayed after just to make sure that we got it. If we didn't understand, he didn't leave us in the blind like that. And when we were dealing with personal problems, and we probably deserved for someone to say, "Hey, you're fired, you can't act like that at work," he addressed it in a way that didn't offend us to make us just throw in the towel like this is just too hard. It takes more than just a regular person to come into work and go the extra mile." (Tenured Employee)*

Employees described a connection that transcended the work and focused on the relationship between individuals linked together through a shared work purpose. These supervisors went the extra mile for their employees.

Conversely, the research showed that when the relationship was not substantial between the supervisor and the employee, it negatively influenced how employees identified and acculturated with the focal firm. In instances where the chemistry between the supervisor and the employee was poor, it weakened the employee's identification and acculturation process.

The direct relationship between employee and leader is foundational to the identification and acculturation process, but some interviewees shared that they did not have this with their direct supervisor. They shared how their supervisors did not seem to embrace and embody the culture of Chime themselves and how that presented a barrier to the employee. Interviewees also keenly perceived when other supervisors did not seem to spend time getting to know the employees in their areas and others. The employee expectation was that the supervisors set the example, and in some cases, this felt flat. In one instance, an employee felt like his supervisor was just there for the perks that came with the job but not for the mission or the connection, and he did not seem supportive of those he supervised.

> *"Some of the younger ones just like the title. They like the money. But they don't want to work." (Tenured Employee)*

> *"It goes back to the leadership at Chime. I don't see them [the supervisors] walking around interacting with the people. I don't see other leaders outside of my own immediate area interacting with other people outside of their own client focus area. I don't see that." (Tenured Employee)*

> *"After a year, if I only know or have spoken to three leaders, that isn't that many. Now I introduce myself to everybody, but you don't see that between the leaders outside of your immediate boss. What does it say about this culture that they don't know me? I make eye contact and speak when I see people, but you don't see the other leaders [doing that]." (Tenured Employee)*

One employee shared the dynamics that she shared with her supervisor. It was not a terrible or toxic relationship, but it was not what she thought it could or should be. When asked if poor supervisor chemistry was a barrier for her to connect with the culture, she shared that his "care-less attitude" did influence how she felt about the company, and she went on to describe how there are some fantastic supervisors, and there are others who are just "phoning it in,"

> *"You have some supervisors that are just there for a paycheck - that is at any job. They're just going to be there to get a paycheck, but then you have some amazing, great cheerleaders [supervisors] that are there for the company, and they still might have that bad apple [employee]. The supervisor can cheer them [the Chime employee] on, you could do cartwheels, backflips, fireworks, and they are still going to be stuck in that bad apple rut. Entitlement - it doesn't matter if they are young, old, or in-between; that is just how they are going to be." (Tenured Employee)*

This finding ties back closely to the leadership action of developing tight relationships at every organization level. This is a two-way street meaning the supervisor needs to set the tone for a relationship with their employees while it is also incumbent on the employees to foster the relationship. The chemistry between the supervisor and the employee, when negative, presented to be a barrier for employees as they sought to identify and acculturate with the focal firm.

V.3.6 Leadership Action Summary

From leadership, there are specific actions that have been empirically shown to facilitate communication and socialization of focal firm culture to employees including, clearly defining and managing the roles of the focal and client firms, clearly communicating at each level of leadership, communicating incentives, building and communicating connection opportunities, sharing personal stories, and developing deep relationships with the employees under your care. These actions taken by leadership were shown to effectively drive employees' identification and acculturation with the focal firm.

V.4 Employee Experiences

In addition to the leadership actions taken, there are factors from the employee perspective that can either strengthen or weaken the employee identification and acculturation process. The employee experiences which moderate the identification and acculturation process are detailed in this section. It was important and interesting to identify the themes that emerged around the employee experiences in response to the leadership actions. From the empirical evidence, the following seven employee experiences surfaced as themes: Sense of Family, Belonging, Care, Value; and Firm and Personal Value Congruency.

V.4.1 Sense of Family, Belonging, Care, and Value

Sense of family was a theme that emerged when interviewees were asked to describe the firm’s culture. The theme emerged again when employees were asked about the experiences that caused them to embrace and embody their employing firm's culture. Extant research indicates that the most common characteristics motivating identification in family firms are shared values (Elsbach & Pieper, 2019), which is abundantly clear in the employee descriptions of sense of family.

In response to leadership actions driving the identification and acculturation process, employees pointed to a sense of family as a factor strengthening their identification with the firm. Seven interviewees referenced the sense of family they experienced based on the culture at Chime.

> *"Everyone in that building knows everyone -- even down to IT. When IT tries to hide from us, we know all the hiding places; we know who to call to find them. It's like a really big family. IT are your cousins - the officers; they're like your big cousins - it is like a really big family. It's so funny to me because I've never been in a professional setting where I really felt like this was my family." (Tenured Employee)*

> *"Even with your family, for example, in the summertime, you've got cousins that you've never met before, but you are family, they might talk funny, they might look funny, but they're still your family. We respect everyone, even the ones that don't know certain things. If they don't know, we teach them because again, that's family." (Tenured Employee)*

When asking a leader the effect he thought the sense of family had on employees, he commented,

> *"I've heard people say it's my home away from home. So I think the long-termers are definitely those people who get something from coming to work every day. And I think the culture has a lot to do with it." (New Senior Leader)*

When the employees interviewed describe how firm leadership gives them a sense of family, they shared how they valued this, and it helped them identify more closely with the firm.

Another theme that emerged as significant in strengthening employee acculturation is a strong sense of belonging. Feeling known and a part of something bigger strengthened employees' desire to acculturate. Working for a firm that had something they felt proud to be associated with affected how employees identified and acculturated with the focal firm. A sense of belonging means that the employee feels like they belong to the organization and the organization belongs to them. When an individual experiences a sense of belonging, they identify with it. When I asked one tenured employee if she identified with Chime and, if so, how, she shared,

> *"Everyone knows I am M*** from Chime." (Tenured Employee)*

To understand the impact the sense of belonging had on employees, I asked what it would take for the employee to consider moving to another firm. One employee replied,

> *"The only way I would leave [Chime] is if the [family owners'] hands were on something else. And they said this is what we're doing. This is what we need you to do. And this is the agenda. [Otherwise] I'm not going anywhere. I love my job. (Tenured Employee)*
>
> *"I've never worked anywhere where you actually see your CEO, and they know me by name." (Tenured Employee)*

To learn how this sense of belonging worked at the focal firm and gauge its potential impact on the identification and acculturation process, I asked a manager how and why this was significant for employees.

> *"You get the people who have been really searching for a place who have been going from job to job and haven't had the stability that Chime provides, and those are the people who really come and embrace everything about Chime." (New Middle Leader)*

In the Ouchi and Jaeger study, they highlight the need humans have for affiliation, belonging, or love, which can be satisfied through feeling that they are part of a group or company (Ouchi & Jaeger, 1978).

Feeling cared for was mentioned by 13 employees throughout the interview process. Employees openly shared stories, often with emotion, of how the firm showed them care and what it meant to them. Their stories and details of how they experienced care contributed to their feelings of warmth, connection, and identity with the firm.

"I have worked for other companies that didn't care about me. They didn't care. They didn't try. They didn't value what was needed. I would say that what sets Chime apart." (Tenured Employee)

"Who can say that the supervisor of their job pushed them to just keep going. Keep going. Keep going. That's not their job to push you to keep going. It's their job to make sure you do your job, it's not their job to care, and my supervisor actually cared. And I guess that's what I am saying... he actually cared, and I appreciate that." (Tenured Employee)

"I had a doctor appointment the other day and [my supervisor] checked with me and asked if I had clocked in yet, but I told him I was still 20 minutes away, and I showed him how fast I was driving, and he said, 'oh no, you drive safe.' He wasn't just checking to see if I was at work but checking on me." (New Employee)

A new leader who had only been with the company a few months at the time of interview shared how even in her short time with Chime, she felt proud to work for such a caring company. When people have strong, positive feelings about a company, they want to be associated with it and identify with it as this leader shared,

"[I have] a little bit of pride to work for a company that actually truly cares for me." (New Senior Leader)

Another leader shared about a member of her team. Because of the connection and the team's relationship with this individual, they could tell he was struggling, found out why, and came together to provide care and support.

"I'll share the story… there was a young man that worked for me, and he just wasn't doing well one day. He just really was off. And for one thing, you have to notice stuff like that. It's kind of hard being remote - but we are in chats all day, but for someone who is normally very vocal and active in the chat, if they are not that day, you wonder, what's going on with them? You need to give them a call and find out what's going on. With this young man, I reached out to ask. I found out that he was in a position where he really didn't even have anywhere to go that night when he left work. He had been put out of a hotel, and he didn't have anywhere to go. We rallied together, some of the leaders here, and we were able to pay for his extended hotel. My thought was - I need you to be productive - I need you to know that we care and that Chime has your back. We went ahead and paid for his hotel to make sure that he was cared for so that he could be productive." (New Senior Leader)

The previously detailed programs that Chime offers were referenced as how care is shown to employees. Several employees praised the firm and shared how these programs demonstrated the company's care for them as individuals, not just as employees. That enhanced the acculturation process.

> *"One thing that I like is they are always having a lot of seminars and things to try to create culture; they truly endeavor to do that. There have cooking classes, fitness classes; they have credit repair workshops, they had a cooking class…just different workshops trying to bring people in." (Tenured Employee)*

One enthusiastic interviewee shared her experience with the Total Life program and how it transformed her life.

> *"For me, [Chime] is a blessing because if it wasn't for that opportunity with the home workshop, if it wasn't for the opportunity of this job, I wouldn't have been able to [purchase my first home]. So, yes, I feel very well connected. It is because of Chime that this happened. I see it as a blessing because it allows me to do this, this, this, and that. It allowed a lot. It allowed me… my daughter is in college, and it helps me pay for that." (Tenured Employee)*

These acts of care, both small and large, put action behind the words and demonstrate to employees the firm culture's people-centricity. When employees and managers see congruency between the espoused value of care and the enacted value of care, it is meaningful. Showing care for the employees was shown to strengthen how employees identified and acculturated with the focal firm.

Another notable characteristic that emerged and strengthened employee identification and acculturation was the sense of feeling valued. Employees mentioned 15 separate times that they felt valued by Chime. This experience for employees was especially significant because it correlates with the fourth band on Maslow's Hierarchy of Needs, Self-Esteem. This is a higher need than that of belonging and significant to how individuals might identify with a firm that helps them achieve this feeling. Both employees and leaders shared how they perceived feeling valued by the firm.

> *"Chime believed in me even when I didn't believe in myself." (Tenured Employee)*
>
> *"They [the firm] think of things to build you up, not just break you down like you're a number and make you feel like you just go to work, work and come home and that's it. They figure out things - they look at people to figure out how to build them up" (Tenured Employee)*
>
> *"Even on my worst day, if I come in and I'm just having a bad day, I never feel undervalued." (Tenured Middle Leader – former agent)*
>
> *"They make you feel wanted. I mean, everyone wants to feel wanted and feel appreciated and have that good feeling like, yeah, somebody recognized that you did the work -- that you are putting in the work. You feel your worth." (Tenured Employee)*
>
> *"I feel valued there [at Chime], and they encourage me to really be the best version of myself." (Tenured Employee)*

Sense of value came through loud and clear from employees interviewed at Chime, and often these feelings were emotionally described and shared by employees. References to the sense of family, belonging, care, and value emerged numerous times in the evidence, and employees openly shared how they experienced those feelings in positive ways with the focal firm.

V.4.2 Congruency between Personal and Firm Values

Congruency with personal values was another experience reported by employees which encouraged them to identify or acculturate with their firm. Extant research shows that employees who perceived high-value congruence with their leaders reported higher organizational commitment than others (Ryu, 2015). Additionally, research indicates when individuals identify strongly with an organization, the attributes they use to define the organization also define them (Dutton et al., 1994).

Seven employees cited that the values they saw in their leader and the firm were harmonious with their own, and they described how that helped them to identify with Chime.

> *"First, they are a Christian company, and they have godly beliefs, which is very, very, very important to me. They are family orientated. That's very, very important to me as well. That's the number one thing that keeps me there -- that connection because I can relate to that to the Christian aspects and the family aspect." (Tenured Employee)*

> *"Being able to relate to their values, being able to relate to their beliefs. You know, that keeps me there because I'm in that place myself." (Tenured Employee)*

Servant leadership was a value that multiple leaders of the firm referenced, and it was a concept believed to be congruent with the firm's values and a practice they embraced for serving the employees they supervised.

> *"To be successful, it's going to require servant leadership and the humility that comes with it, the drive that comes with that, the thirst to achieve to spread that. [Our CEO] does that well. My heart rate goes up when he says, 'If you're here for any other reason other than servant leadership and to help people achieve and become better people, re-consider what you're doing because I'm looking for leaders that are cut from that cloth.' I love that. I'm attracted to that. That is the type of work that I want to do." (New Middle Leader)*

> *"I'm going to make myself available to you to help you whenever you need. I'll do that at any hour of the day, and I'll do that every weekend. I'm gonna make myself available. It is part of the servant leadership." (New Middle Leader)*

Many employees reported being attracted to the firm because their values were congruent with those of the focal firm. Ryu reminds us that when employees hold values similar to those of their employing organization, employees experience beneficial outcomes, such as greater job satisfaction, increased organizational commitment, and higher intent to stay in the organization.

V.4.3 Employee Experience Summary

Employees shared the experiences and responses encountered due to leadership actions that helped them identify and acculturate with Chime. The experiences, including the sense of family, belonging, care, and value; and personal and firm value congruency, strengthened the propensity employees have to identify and acculturate with the focal firm. In some cases, one of these experiences was enough for an employee to identify and acculturate with the firm; in other cases, employees responded with a combination of these experiences, which caused them to identify and acculturate with the focal firm more strongly.

V.5 Identification and Acculturation Factors

The previous sections detailed leadership actions that drive identification and acculturation to employees who work for the focal firm and serve a client firm full-time for an extended period. Also detailed are the employees' experiences based on the actions of leadership. This research also indicated that the identification and acculturation process is not foolproof, and other factors can influence the identification and acculturation process. This section examines the other factors influencing the employee identification and acculturation process, Employee Barriers and Client Inputs.

V.5.1 Employee Barriers

Some barriers exist that influence an employee’s propensity to identify and acculturate with the focal firm regardless of the time, resources, energy, and strategic leadership efforts. These barriers may weaken or perhaps nullify the previously discussed experiences other employees had to leadership actions, but the research also found that some barriers could be overcome. According to the research, a robust organizational culture acts as a “reliable compass and powerful lever” to guide an organization’s employees (Yusof & Ali, 2000). While many things could present a barrier to an individual identifying and acculturating, themes emerged from the data collected through interviews, which were noteworthy to include in this case. While these barriers may or may not be overcome by employers, it is helpful to identify them. The recurring themes include a fixed employee mindset, a disadvantaged background, lack of physical proximity to the workplace, and poor supervisor/employee chemistry.

The first barrier was employee mindset. When asked why some employees would not take advantage of all Chime had to offer in terms of incentives and connection, interviewees pointed to the presence of a fixed mindset evidenced in some employees. One employee described what she saw in some employees who did not embrace and embody the culture of Chime,

> *"It [the culture] is not going to work for everyone because everyone is not at the point where they're ready. And you can't make someone want something. And I've caught myself wanting something more [for someone] than that person wants it for themself. It is a letdown. It doesn't matter how much you address it, package it, make it look so pretty. Some people just don't want it. So there's not going to be 100% perfect. There is going to be some who just don't want it." (Tenured Employee)*

Another employee described what she saw as a barrier to her acculturation. Even though the research showed that the firm made its mission to offer employees growth opportunities through both preparatory courses and experiential opportunities, this employee shared her frustration regarding how she viewed potential growth opportunities.

> *"One thing that makes it feel like just a job is that there is not a lot of room for growth here. There are only 20 management positions, and you have 100 people. And so I don't have a lot here for me. There is no line of succession for me." (Tenured Employee)*

When pressed as to if there might be other opportunities within the firm to consider since growth was a business goal and something I had easily observed, this interviewee repeatedly insisted that she had nowhere to go, and it was "just a job."

I asked a leader why someone would share that they saw no path when it seemed, based on what I witnessed, that there were many opportunities and growth at the organization. She replied with frustration,

> *"They're taught from their parents that this is what it is, and you get the job you can and take care of the things you have to take care of. We have literally grandmas, moms, and daughters who all work at Chime who have the same mindset, and so even when we're talking about coming to work, the mindset around it is kind of mind-blowing. Individuals that seem to need their paychecks the most, every cent of it, but the number of excuses and things that we find for people that don't come to work, it's just a fixed mindset. I don't know how else to describe it besides the mindset; their mindset on things is a lot different [than other people]. So trying to literally shift that for them to understand the things that they need to do to develop and grow and the opportunities that will be available if they invest in that." (Senior Leader)*

A fixed mindset presented to be an obstacle for leadership to overcome.

Another obstacle that was noteworthy in this context and dovetailed with the fixed mindset barrier is the impact a disadvantaged background had on the identification and acculturation process. While many employees in this case study hailed from communities that were traditionally under-resourced, in some cases, this strengthened the identification and acculturation, and in some cases, it weakened it.

Research has indicated that forces propelled by technological change produced high rates of urbanization, mobility, and division of labor which weakened the community, family, church, and friendship ties of many Americans in recent decades. Social observers point to this weakening of associations as the primary cause of increasing rates of alcoholism, divorce, crime, and other symptoms of mental illness at a societal level (Ouchi & Jaeger, 1978).

Research showed through interviews that employee background influenced the identification and acculturation process with the focal firm, and a challenging background could hinder or strengthen the employee's ability to identify with the firm. A variety of specific attributes, including a lack of educational opportunities, economic hardship, and familial strife, added obstacles for some employees to trust the firm and their leaders and identify and acculturate.

When asked which specific factors focal firm leadership encountered that might cause an employee to fail to identify and acculturate, a senior leader shared,

> *"The folks that work for us have very real-life challenges and have been taught and led and educated in ways different than most people who don't understand the demographic would even have an appreciation for." (Tenured Senior Leader)*

Another middle-level leader shared his perspective,

> *"At the agent level, at the entry-level, you have to keep in mind that for many, they're working a job. They have a mortgage to pay, a babysitter, you know, bills. And it's hard for them to see beyond that. (New Middle Leader)*

Another senior leader shared that as a senior leadership team, they recognized the barrier some employees had coming from a disadvantaged background, but they struggled to know how to convince people and help them understand that they are worth it and that the company is investing in them because they know they were worth it and want to help them be the best they could be.

> *"I think most people [that we hire] have never been told in their lives that they can achieve or that they are capable or that there are opportunities or they're worth it or any of that." (Tenure Senior Leader)*

> *"Just learning how to dress, how to create an email, how to communicate effectively with the client. Those are things that we have to teach people. That's part of our culture." (Tenured Senior Manager)*

One employee described herself as one of the worst when it came to her attitude when she was first hired.

> *"I was somewhat of a product of my environment, and I did not have a full understanding of it, and I was very reluctant to adapt and trust." (Tenured Employee)*

> *"I had a lot of personal problems that were my barriers [when I came to Chime]. It wasn't that I couldn't come to work and do the job - I could do that with my eyes closed; it's just the personal barriers from my background. Coming in one day, I have one mood… coming in another day, and I'm in another mood. I come from a*

> *place where we have personal barriers, personal things we deal with that may make us lash out or lie, or things that might make you not come to work and things like that." (Tenured Employee)*

This employee shared the challenges she had in her life when she first came to Chime, and this same employee was able to overcome these barriers and excel at Chime and become one of the biggest Chime cheerleaders I interviewed. When asked what made the difference, how did she overcome it, she shared,

> *"I'll be honest, I see the change happening in me, and I kind of feel lucky. I would say at least 80 percent, maybe even more than that was due to the care of my supervisor, Mr. X." (Tenured Employee 1)*

Another employee shared how she came from a disadvantaged background and how that was initially an obstacle for her at Chime, but that as time passed, the culture became contagious, and she began to change and to identify and acculturate. As pleasant as she was when I interviewed her, she described herself when she started at Chime in an unfavorable light,

> *"When I first started, I'm not going to lie. I was kind of an asshole. Yes, when I first started, I was a real smart asshole. I always had a rebuttal. I would not listen. That's why I said Chime taught me how to communicate. Communication is also listening. I would not listen. I always had something to say. I would not shut up." (Tenured Employee)*

This did not sound like this could be true of the person I was speaking to, so I asked her what had changed to help her identify with the culture. She shared,

> *"You can basically walk in with nothing, nothing at all, and feel like nothing. And [you] walk away feeling like something, like you have a purpose." (Tenured Employee)*

She also shared how she was able to identify with the CEO. How even though she came from challenging circumstances and initially did not believe the opportunity at Chime was the real deal, when she continued to see management, particularly from the top, pour into the employees, she started to change. She shared with excitement you could hear in her voice about the admiration she had for the firm CEO.

> *"You just don't see a black man in that position with that much power to give that much. You might see a black man with a restaurant, and he can employ and maybe twenty or thirty at the most, but never a black man in that position to create that many jobs and see that many people -- never in my life. The character of Mark [CEO] of giving back is different. I'm black, and being black, coming from a small country town, Jackson, Tennessee, which is the hub city in between Memphis and Nashville, we would never see a black man in that position to give that many jobs or even a black millionaire. That is unheard of where I'm from." (Tenured Employee)*

These stories were interesting findings and tangible examples of how a barrier to identification and acculturation for employees became a catalyst for some employees to identify and acculturate with the focal firm. In the two instances described above, strong leadership, investment, and communication with a dose of patience caused them to embrace and embody the Chime culture.

Another barrier that emerged from the research that weakened identification and acculturation was physical proximity. Before the Covid-19 pandemic of 2020-21, focal firm employees supported various clients from one of three call centers in the suburbs of Atlanta, Dallas, and Charlotte. Since March 2020, employees have worked remotely. This has materialized as an identification and acculturation challenge for some newer employees who have onboarded during this unprecedented time. The pandemic's extended length has limited the opportunity for many employees to work in a Chime office. They have been unable to create the personal connections that are characteristic of Chime's culture. The employees who have joined Chime since March 2020 were onboarded virtually, and despite efforts by leadership, their experiences with culture have been colored by this world event. A few employees shared their experiences with connection and the lack of proximity.

> *"Because we are virtual, when we try to reach out for help, there's not a lot of supervisors on hand to help. We have to wait for someone who can get to us to assist." (New Focus Group Participant)*

> *"It's kind of hard to connect with people online, and because of Covid, it's not even safe to really have a gathering." (Focus Group Participant)*

When asked about the on-boarding experience and getting a dose of the culture at the start, one new employee shared how the experience was truncated due to Covid,

> *"I don't want to blame everything on the pandemic, but basically, [when I started] we went and got the equipment. They got us all set up, and it was all about being safe. We got the things we needed, and then they sent us on our way." (New Employee)*

The pandemic may be a temporary condition hindering identification and acculturation for some employees, but it has had a significant effect on employees because it has been prolonged.

> *"Not being able to interact with other people [in the office]… that kind of brings me down a little bit here because I love that. I love being able to talk to other people and what I call making my rounds. I need people." (Tenured Employee)*

> *"I'm hearing a lot of feedback from managers who are managing employees that they're really kind of sad right now. People are down, and they've been cooped up in the house all day and with kids who would normally have the outlets of socializing with other kids. It's been challenging for everyone." (Tenured Senior Leader)*

So while this may be a temporary barrier for identification and acculturation, it is noteworthy as the separation may have an even more profound impact on an employee working for a focal firm that supports a single client firm for an extended period.

Barriers or factors that influenced the identification and acculturation process for employees included a fixed mindset, a disadvantaged background, physical proximity, and, as mentioned earlier in the findings, a poor relationship between the employee and their direct supervisor. In some cases, these factors which present barriers to individuals identifying and acculturating are entirely out of the realm of control of focal firm leadership; however, in some cases, when supervisors doubled down on the leadership actions found to be essential in the findings, some employees were able to overcome these obstacles and successfully identified and acculturated with the focal firm.

V.5.2 Client Inputs

In addition to employee barriers, Client Inputs emerged as a factor influencing the employee identification and acculturation process. The dynamics of this role influence are unique to this context and warranted investigation. When the outlined leadership actions are robust and lead to positive employee experiences and an absence of the employee barriers detailed in the previous section, client inputs have been shown empirically to have minimal effect on the identification and acculturation process. Even though employees support a single client full-time for an extended period and are surrounded daily by client artifacts, espoused beliefs and values, and basic underlying assumptions of that client, the focal firm employees reported being capable of balancing this tension.

The interaction employees have with the client firms they support is a unique experience, and the effect that client interaction has on the employees' ability to identify and acculturate with the focal firm is complex. It might seem likely that Chime employees would identify and acculturate with the client firms they support over the employing focal firm; however, the research found that employees reported connecting and identifying primarily with the focal firm's culture rather than the client firm which they represented. This is somewhat surprising because these employees spend most of their time surrounded by the client firm's artifacts, processes, procedures, and customers. By conducting this research, I uncovered the dynamics in play in that relationship and gained insight into how the employees balance the tension of identifying and acculturating with the focal firm while supporting a firm client.

The client firm's role in the employee's identification and acculturation process is intertwined with that of the focal firm. As shown in earlier findings, the focal firm must communicate and manage the focal and client firm's roles and relationships for the employees. Providing the focal firm does a clear and consistent job communicating that at all levels of leadership to the focal firm employees, employees indicated that they could distinguish between the employing focal firm and the client firm they supported, and they were able to identify and acculturate with the focal firm. However, the client firm is also an important factor in this process. In this study, all focal firm employees interviewed reported that the client firms they supported provided the necessary processes and procedures and enough cultural knowledge to support the employees' success at their jobs. There was no evidence in this study of the client attempting to over-acculturate the employees and no evidence that showed they did not provide the requisite information to enable the employees' success. This appears to be due to the excellent job the focal firm did with managing the roles and relationships and ensuring the clients provided the appropriate support for the employees. While the client plays a critical role in providing the employees with the needed information to support their firm well, if it is not done in conjunction with the focal firm's relationship management, the desired outcome of acculturation with the focal firm is unlikely. The research found that when the focal firm did a good job managing the roles and relationships, and the client firms did an adequate job preparing employees, focal firm employees felt supported and equipped to represent the client well and did not result in employees identifying with the client firm as the primary relationship.

It might be reasonable to think that over time, employees who work for one firm but work full-time for an extended period with a client firm could struggle to balance the tension between the two firms and subsequently shift their loci of identity from the focal firm to the client firm. I asked the employees to explain how client actions influenced their ability to identify and acculturate with the focal firm. One employee described how he balanced that tension when asked which firm he identified with as primary.

> *"Well, it is both [identification] to some extent. Our paychecks, which is the most important reason why you work, say Chime, but you do spend your day taking these calls from places like [Client 1] or [Client 2]." (Tenured Middle Leader –former agent)*
>
> *"Even though we receive the cultural training, it feels like this is just the job. This is the account I am on; however, I work for Chime." (Tenured Senior Leader)*
>
> *"What I liked about [client training] is that unlike doing virtual training, the [Client X] trainers were there and they were hands-on, and because they were hands-on, I think that allowed for us, and me and my particular training class to grasp the concept of what we were about to do and everything was clear. (Tenured employee)*

I inquired about the employees' training to uncover if it was primarily processes and procedures to do the job successfully or if more client firm cultural elements were present. I also inquired if learning too much about the client made it difficult or confusing to differentiate between the focal and client firm. One leader explained,

> *"No, I mean, it's pretty white-labeled. So you're trained to know specific client projects and to be able to speak to whatever you're talking to people on the phone about. For instance, like people who are on the [Client X] account, I don't think they are connected to [Client X's] core values or what happens internally at [Client X]. I think it's pretty separated." (Tenured Senior Leader)*
>
> *"I think that our clients are hiring us and entrusting us because of the culture that we have built versus needing us to adapt to their culture. I think that allows us to still streamline our goals as a company because we're still on one page, and our main focus is serving our clients, not being embedded, not becoming our individual clients. If you walk around at our HQ, you wouldn't know the difference of who's talking besides like a couple of collateral pieces on the walls or something or the banners, and you wouldn't know that these are people supporting [Client X] or [Client Y]." (Tenured Senior Leader)*

I asked a direct supervisor if the employees could articulate the nuances between the focal and the client firms, and he admitted that it took some time to understand the dynamics of the relationship, particularly for new employees.

> *"It's a very complicated relationship between Chime and Client X. You really have a couple of different bosses. You have your boss at Chime, and you have your boss at Client X. It takes you a little while to kind of figure it out. How to interact with multiple different bosses, especially when you're getting different questions and having to give different answers." (New Middle leader)*

I also asked the employees if they were conflicted or confused between the two firm cultures and identified and acculturated with the focal firm. One employee shared how she managed the tension.

> *"I think no matter [what] I always remember that I work for Chime. I mean, even though I've been with [the same] client for four years, I wouldn't say that I have acculturated with Client X as I have with Chime. I haven't. You can tell the difference." (Tenured Employee)*

Employees further shared that not only did they *not* experience confusion, but that they encountered numerous positive experiences working with the clients they served, which made them feel better about their jobs and may subsequently have helped them to identify even more closely with the focal firm. While they expressed appreciation for being treated well by the client, they expressed no inclination in any of the interviews or focus groups of forming a primary locus of identification with the client they served. Empirical evidence showed that most employees were able to separate the two firm cultures even though the experiences they had with the client were positive. When asked if the client made them feel a part of the client organization in any way, one employee shared,

> *"[The client] often includes us, even though I think their main campus is in Orlando. I can tell that when they have events of something, they do try to incorporate us into that." (Tenured Employee 4)*

When asked how the client firms share their unique culture with agents supporting them, employees mentioned receiving swag and spending time with client leaders. “Swag,” or items emblazoned with client firm logo, is a big hit with employees and helps agents feel connected to the company they represent, but this just made them feel good about their work and did not cause them to switch their primary locus of identification from the focal firm.

> *“On one of the culture days that we had, which is when one of the clients that we service comes to talk to our agents to give them an idea about their firm’s culture, they gave us a whole bunch of stuff. They gave some cups, some ink pens, some highlighters, sticky notes. We [the agents] want anything branded that has to do with any type of work that we do. I'm the same way.” (Tenured Middle Leader – former agent)*

> *“When we have regular annual enrollment, not virtual like this, teachers from the client come to our locations, and they bring swag. Whenever agents are doing really good, they might get a [Client X] t-shirt, or they might get a [Client X] pin. I always want something that says [Client X] because that's the umbrella I work under.” (Tenured Middle Leader – former agent)*

The employees shared how they enjoyed “swag’ whether it was from Chime or the client they supported. Leadership shared how much they liked that and how they are increasing the “swag’ that is Chime branded.

> *“When they come in, we give them some Chime things like a stress ball and water bottles. We have Chime masks. We want them to feel like they have Chime stuff. I really want them to wear the Chime mask.” (New Senior Leader)*

The Interviews indicated that employees could successfully differentiate between their employing firm and the firm they supported well. When asked which company an employee identified with, one employee shared,

> *“Definitely Chime. We may say, I work for, or I support this client, but that connection to that client is by the work, not by the culture. Chime pays my paycheck every week.” (Tenured Employee)*

When asked, a leader at Chime shared his perspective on how the Chime employees manage the tension between the focal and the client cultures,

> *"[Employees] would know, 'Oh, Client A's culture is about, X, Y and Z.' They may have some connection to it, but that is in the background. The foreground is Chime." (Tenured Senior Manager)*

In some ways, the relationship is complex, and in other ways, it is straightforward. One Chime employee shared a story about her connection with the client she represents. As she was traveling on vacation with her husband, she saw a sign for a town where she knew Client X had a location.

> *"Client X has locations all over. When I was traveling, I started seeing the signs for The Woodlands, and I told my husband, "Oh, we have offices here." He was like, "We? You know you work for Chime." I chuckled and said, 'Oh, you know what I mean.'."*

When the client firm equips agents to do their jobs well and successfully, agents thrive and focus on acculturating with the focal firm. To better understand the client role in equipping focal firm employees for their job roles, I asked how employees processed client information. I learned that after an employee was initially hired, and before the employee learned anything about the client firm they would support, all employees attended an orientation where they received their laptop and other needed equipment, and then they were on-boarded to the focal firm with an orientation session. The CEO of Chime shared how he prioritizes a visit to each of these sessions to meet the new group and to share his mission for the company so the employees could begin to connect with them and help the employees understand that they worked or Chime and a large part of that would be supporting a single client firm. By setting the stage early, he hoped to help employees embrace the culture of Chime and be prepared to learn the client information needed to be successful at their jobs.

"Most CEOs do not feel that they have time to go to every training class and have this kind of motivational speech. I don't think my time is better spent anywhere other than that. I can't think of something else that would be more important than doing that because it's really setting the stage for me to connect with the people with whom my success is dependent. So I must invest where that is." (Tenured Senior Leader)

After the initial orientation, the employees enter training on the specific client they will support. Sometimes trainers from the client lead that training; other times, it is Chime trainers. Identifying the firm that the trainer represents is vital for new employees to understand each company's role. I asked if the employees learned about the culture of the client firm or only the procedures to do the job, and one newly onboarded employee replied,

"Laura was the trainer for our group, and she did tell us some cultural things because she works for that company - she doesn't work for Chime - she works for Client Firm X. She gave us a lot of background. It was helpful." (New Employee)

I gleaned perspective from focal firm leaders about how the employees processed client information. One leader shared how they prepare employees when they are ready to learn from the clients they support,

"Even though it's going to feel like you work for [Client X], you actually work for Chime, so the main thing [to learn] is when and how to escalate certain things and where your escalation points are." (New Senior Leader)

Another leader shared how the clients continually shared information with employees, so they were always well prepared to support their accounts.

"Our clients are very actively involved in our programs. It is continuous; we call it CE, continuous improvement training throughout the month where they give [employees] refreshers on policies, procedures and then also any updates for the company." (Senior Tenured Leader)

The research found that clients often partner in the employees' training and call these events "culture training." These are sessions designed to provide the employees with more than just the procedures, but extra information about the client helps them feel prepared to excel at their job.

> *"The [initial] training can last between four to six weeks of classroom training. Our clients will usually come in for part of that training, and we call it culture training. They'll come in and say, 'these are our values, this is who our customers are, this is our industry, this is whom we support, these are who our customers are, this is what you can expect.' So they come in and may do an orientation, and then it's interweaved within the training of the four weeks when the employees get to learn about the customer. But mostly, it's about procedures and policies." (Senior Tenured Leader)*

While this focused training is not designed to acculturate the employees with either the focal or the client firm per se, it equips the employees to excel, and the time and care invested for employees support the culture of the focal firm. One leader shared insight into what she believes clients provide,

> *"The client provides solid training but doesn't really drive their culture to our employees. Most of that is driven by Chime in terms of culture. [The client] may have some type of team camaraderie because they are all taking calls from the same client, but the culture piece is driven by Chime." (Tenured Senior Leader)*

While research indicated that employees balanced this tension well, evidence of instances weakened the employee identification and acculturation process with the focal firm. To learn more about what could hinder or weaken the identification process for employees, I asked a Chime leader the extent to which the client firm required each employee to act as a true extension of the firm to its customers. In other words, did the firm require the employee to allow the customers they were serving on behalf of the client to assume they were employees of the client? The senior leader replied,

> *"Many of our clients tell [our employees] not to say that they are with Chime and instead to say that they are with [client name] if they ask." (Tenured Senior Leader)*

This could pose a conundrum for employees, although no employees reported being confused with this request or affecting how they identified with Chime. There was a similar tension that the agents in the Bikkina study (Bikkina, 2010) faced when masking localization. If employees are "pretending" to be with one firm when another firm employs them, it could promote identity confusion for the employee. I asked another senior leader the extent of client firm acculturation desired to serve the customer well. The leader described his experience in training.

> *"Having sat through numerous training, some [cultural training] are better than others. Some of our clients have a more interesting cultural story than others. But it is covered in the training because we want our Chime employees that are supporting Client A to embody the culture of that client, to seem like you are a part of them. So, yes, culture gets covered in training too." (New Senior Leader)*

One manager explained the tension that some individuals experienced when a new employee onboarded at the focal firm.

> *"A lot of this stuff has to do with how long a person has been there. When someone comes in new, they meet the people at Chime, and then they go directly into training with [the client]. They log into the client system. They see and feel and hear and touch all client things. So if you ask someone who's been there for the first week, there's the 50/50 chance they're going to say they work for [the client] because they just don't understand the relationship. But as you gradually talk to them, as you gradually coach, they start to realize they work for Chime. It's just the nuances of they get hired by Chime, but within the first hour of being in this job, they're talking to [client customers] and being in [client's] system." (New Middle Leader)*

The leader explained that this was especially tricky to navigate during the pandemic when relationships are built virtually rather than in person. However, the focal firm continued with the principles of clear and consistent communication of leaders at all levels, sharing relatable stories and appropriate incentives, providing plenty of connection opportunities, and investing in the development of deep and meaningful relationships between supervisors and their employees to combat identity confusion and to foster acculturation with the focal firm.

Interestingly, even though Chime employees support a client firm full-time for an extended period, employees overwhelmingly reported connecting and identifying primarily with Chime's culture rather than the client firm they represented. This is a surprising finding as it might seem more likely that the employee, surrounded by artifacts of the client firm each day over an extended period, would identify more closely with the client firm or even experience identity confusion where they failed to identify strongly with either firm. What became apparent in the findings was that the client actions could influence the identification and acculturation process for employees, but when the leadership of the focal firm performed the identified leadership actions well, and the client provided the appropriate amount of process and procedural training and basic cultural training for the employee to feel equipped and successful in their job role, the client actions had little effect on the employee identification and acculturation process with the focal firm. Employees felt supported and able to conduct their job functions well while minimizing the risk of identifying with the client firm as the primary relationship.

V.6 Results Summary

When considering the dynamics in play in the relationships surveyed in this study, the combination of factors each employee experiences can lead to a different outcome; however, three general outcomes emerged from the findings. The first outcome is that the employee identifies strongly with the focal firm and acculturates. The employee embraces and embodies the employing firm's culture and potentially even becomes a cheerleader for that firm. The employee has a healthy appreciation for the client they support, and they understand the process, procedures, and cultural norms of the client firm needed to excel in their job roles. They know the client they support, but they have not identified and acculturated with that client. This occurs when the leadership communicates and manages the roles of focal and the client firms, clearly communicates at every leadership level, shares personal stories, communicates incentives, socializes connection and growth opportunities, and develops the employee/leader relationship. When the focal firm performs these actions well, many employees report experiencing a sense of family, belonging, care, and value; and recognize personal and firm value congruency. When the client firm provides the appropriate training of process, procedures, and an appropriate amount of cultural training for the employees to succeed in their job roles, it can strengthen the identification and acculturation process with the focal firm for focal firm employees. When leader actions and client actions are executed in the manner described, positive employee experiences such as higher intent to stay in an organization, job satisfaction, and increased organizational commitment (Ryu, 2015) are realized.

The findings showed that the second outcome occurs when there is a breakdown in the leadership actions. When leadership fails to execute all actions described in the findings, the identification and acculturation process is weakened for the employee, and it becomes more difficult for the employee to identify and acculturate with the focal firm. This particularly occurred when leadership failed to delineate the employing firm and the client firm roles to new employees. Because the business model is complex and could be confusing for a new employee working for one firm but supporting a client firm full-time for an extended period, it is critical to make this relationship crystal clear to new employees on day one. If the client firm does a good or at least an adequate job equipping employees with necessary processes and procedures while introducing them to the client firm culture, and the focal firm does a poor job, the result is confusion for employees. The employees who reported confusion could not clearly explain their relationship with their supervisor or the client contact, which caused identity conflict.

The third outcome occurs when there are factors or barriers outside of the focal or client firm's control, impeding employee identification and acculturation. When an employee chooses not to identify, the employee is not necessarily *disidentifying,* which might cause him to leave the firm or take actions against the firm; they are just likely to be unengaged and disconnected from the firm. In this case, one interviewee failed to identify and acculturate with the firm and demonstrated personal barriers that kept her from identifying and acculturating with Chime. In this case, the individual also did not acculturate with the client firm she supported. This individual wanted to connect with the organization's culture, but she described the opportunity as "just a job" and was neutral to both the focal and the client firm. In at least two other cases, employee barriers were present at the outset of employment. However, these barriers were broken down and overpowered when leadership successfully executed the actions described in the findings as driving employee identification and acculturation. In these cases, both employees described the transformation inside themselves to arrive at this outcome. In other cases, despite leadership actions, some individuals are unable or do not desire to identify and acculturate with the focal firm. While multiple factors could contribute to the "just a job" attitude, this study's main themes include a fixed mindset, disadvantaged background, lack of physical proximity, and a weak supervisor/employee relationship. Leadership and employees alike provided evidence of these barriers with some individuals they managed and worked with, and interviewees were candid about how they saw these factors preventing some employees from successfully identifying and acculturating.

The last outcome that I would have expected to see as a finding would be when an employee in this context identifies more closely with the client firm than with the focal firm. Because employees in this context work full-time supporting a client firm and are surrounded by their artifacts, I expected that as a possible result at the start of my study. No evidence supported that outcome in this case.

The results of this research illustrated how workers who are employed by one firm but who support a client firm full-time for an extended period can balance the tension of managing two firm cultures. These results elucidate the processes the focal firm can use to win their employees' hearts while equipping them to serve their client firms well. This research also examines the barriers that exist to employees acculturating with their firm. While not all barriers can be overcome by the leadership's actions, naming them can help the leadership team in taming them, as evidenced in this case study.

VI DISCUSSION AND CONTRIBUTIONS

This case study offers fascinating and vital insight into employee identification and employee acculturation and addresses the gap identified at the outset of this research. Conducted in a Business Process Outsourcing firm research setting, this study sought to examine the identification and acculturation process for employees who work for one firm but who support a client firm full-time for an extended period. It sought to understand how firms balanced the acculturation process for employees who worked for one firm but who were surrounded by the artifacts, espoused beliefs and values, and underlying assumptions of the single client firm they supported all day, every day for an extended period. This was accomplished through empirical interviews, focus groups, and field observations. Additionally, it was supplemented with a thorough examination of secondary data, including training and marketing materials, newsletters, corporate documents, third-party research firm engagement survey results, and a 2021 Harvard Business Teaching Case Study.

To address the implications of these findings, it is essential to return to the original research question.

> *How does a firm successfully balance the tension of acculturating its employees with its firm while equipping them with the needed processes, procedures, and cultural elements of a client firm when the employees work full-time for extended periods supporting a client firm?*

This case study uncovered the triangular relationship dynamics between the focal firm, the client firms, and the employees. Empirical evidence from this study indicates that many individuals employed by the focal firm, Chime Solutions, indeed identified with and subsequently acculturated with the focal firm even though these employees spent most of their day supporting a single client firm and surrounded by client firm cultural artifacts, espoused beliefs and values, and underlying assumptions. Overwhelmingly, employees at Chime have shown to be adept at embracing and embodying Chime's corporate culture while managing the tension of client firm culture well enough to perform their jobs with excellence to meet client expectations. This case study is significant as it specifically examined this phenomenon in the context of a Business Process Outsourcing firm that routinely employs individuals to serve client firms.

This case study setting, Chime Solutions, made for a unique and fascinating research setting for two main reasons. First, Chime is unique in the BPO space in that it believes in the multiplier effect and purposely opens call centers in the under-resourced areas to aid the local community. This business strategy is intended to give back to the community while tapping into talent that might otherwise be unrecognized. While a logical solution for facilitating identification and acculturation of employees with firm culture might include recruiting and hiring individuals who are already a close culture fit, that is often not the narrative at this firm. In step with the firm mission to help individuals flourish, Chime often hires employees who may, at the outset, have significant personal barriers to organizational acculturation. Chime believes investing in the community is a better way of doing business. Second, Chime is unique in that, unlike many BPO firms where employees manage calls and inquiries from multiple clients, in this firm, each employee services a single client and remains on that account for an extended period. Given these two factors, it is reasonable to assume that employees might have difficulty identifying and acculturating with Chime as the focal firm.

The purpose of this study was two-fold. First, to address the gap and build theory in the employee identification and acculturation literature for firms that strive to build a strong culture but employ individuals who spend all of their time supporting a firm client on this subject; second, to address the practical problem experienced in industry. This study was approached through the lens of engaged scholarship, which provided the researcher with the opportunity to contribute to practical problem solving while developing new theoretical insights (Mathiassen, 2017).

VI.1 Contribution to Theory

This study contributes to theory in two ways. First, it contributes to the body of knowledge in the Employee Acculturation and Identification fields of study, and second by building theory through proposition development, a conceptual framework, and a Firm Identity Continuum.

The first contribution is to the identification and employee acculturation areas of study by providing a detailed, empirical account of the identification and acculturation process in a Business Process Outsourcing firm's unique context. The empirical findings are detailed in the Results chapter and the themes that emerged from the research, including Firm Culture, Leader Characteristics, Leadership Actions, Employee Experiences, and Identification and Acculturation Factors, including Employee Barriers and Client Firm Actions.

A second contribution includes a conceptual framework and corresponding propositions, Figure 8, gleaned through this qualitative exploration and its findings. Figure 8 was constructed to develop theory by illustrating a focal firm’s employee acculturation and identification process. Based on the evidence that emerged and detailed in the findings, it became clear that to address the question of how a firm can successfully acculturate its employees to align with its culture and values when the employees work full-time for extended periods supporting a client firm; the process must start with a strong focal firm culture and leaders who are “bought-in” to the firm and its culture and values. The framework aligns with the five main themes of findings and includes Firm Culture, Leader Characteristics, Leadership Actions, Employee Experience, and Identification and Acculturation Factors, including Employee Barriers and Client Inputs. Figure 8 illustrates the framework, and Table 7 lists the three propositions that make a unique contribution to theory and how they align with the theme, characteristics, empirical evidence from the findings, and extant literature.

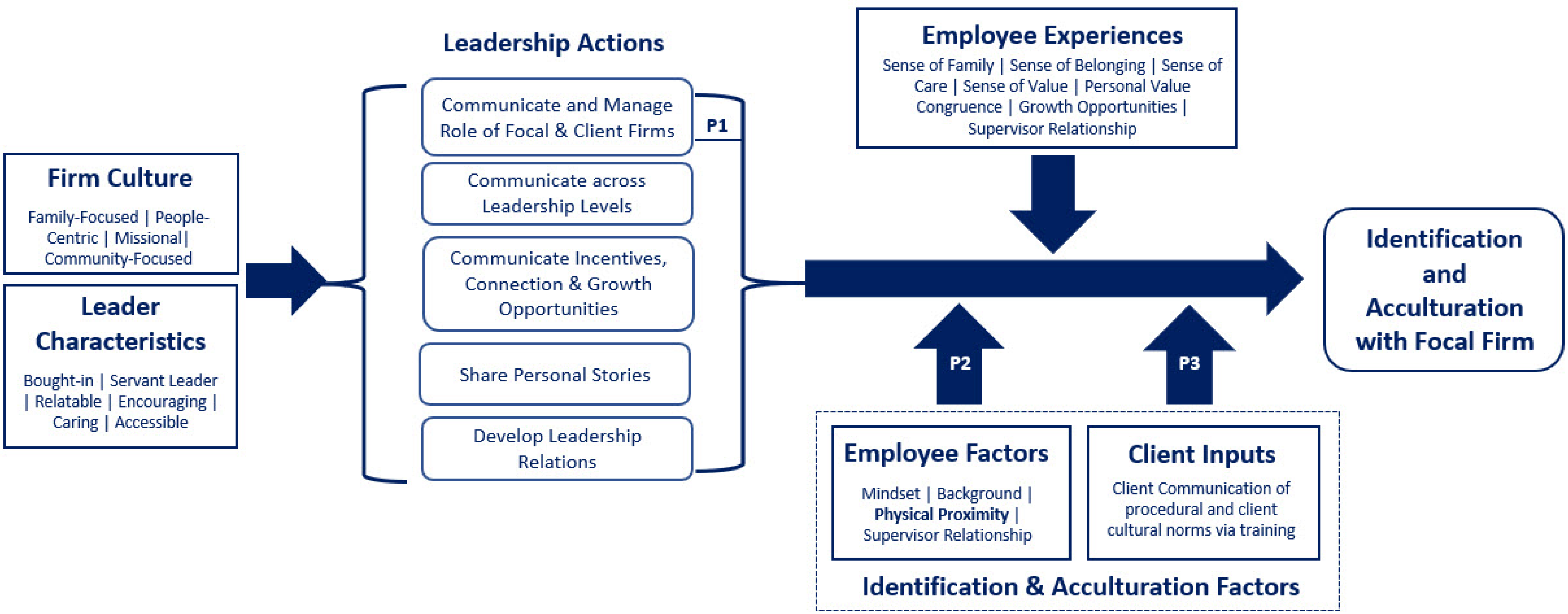

Figure 8: Identification and Acculturation Conceptual Framework

Table 8: Identification and Acculturation Framework Propositions

P1: Clear communication of roles and management of the focal and client firm relationship contributes to employee's identification and acculturation with the focal firm.	
Theme 3: Leadership Actions	
Sub Theme: Communication	
Empirical Evidence *"We do run into [identity confusion] sometimes, but I think the thing is the work we do in orientation and the reminders from the trainers explaining who their escalation people are, helps."*	**Relevant Literature** An individual is strongly identified with an organization when his identity as an organization member is more salient than alternative identities (Dutton et al., 1994)

P2: Lack of physical proximity to focal firm and co-workers influences employee identification and acculturation.	
Theme 5: Identification and Acculturation Factors (Employee Barriers | Client Actions)	
Sub Theme: Physical Proximity	
Empirical Evidence *"Not being able to interact with other people [in the office]… that kind of brings me down a little."*	**Relevant Literature** Work-life balance and feelings of isolation were an issue for some workers (Chen & Nath, 2008)

P3: Client inputs influence the identification and acculturation process, but when leadership actions are consistently executed, employees can successfully balance the tension between the two firms.	
Theme 5: Identification and Acculturation Factors (Employee Barriers | Client Actions)	
Sub Theme: Dual Identity	
Empirical Evidence *"I think no matter [what] I always remember that I work for Chime. I mean, even though I've been with [the same] client for four years, I wouldn't say that I have acculturated with Client X as I have with Chime. I haven't. You can tell the difference."*	**Relevant Literature** Sometimes attachment to a workgroup conflicts with the greater organization (Riketta & Dick, 2005)

To apply this conceptual framework in a practical sense, the strength of the focal firm culture and the leadership characteristics must first be considered. If the firm culture is weak and the leadership is not "bought-in," it is unlikely that leadership will conduct the leadership actions required to drive the identification and acculturation process. In this case, even if leaders execute leadership actions, they are likely to be perceived by employees as inauthentic. Ensuring the culture is strong, and leaders are "bought-in" drives leadership actions. The findings show that once the firm has established a solid and desirable culture and leaders are engaged with it, adopting the leadership actions outlined in the framework can drive employee identification and acculturation of employees with the focal firm.

Empirical evidence has identified the leadership actions that drive employee identification and acculturation as clear communication and management of focal and client firm roles; clear and consistent communication of incentives, connection, and growth opportunities by <u>all</u> levels of leadership, and leaders sharing personal stories and developing strong relationships with their direct reports at every management level. The focal firm must ensure strength at every level of leadership. Senior leaders should spend time ensuring each level of leadership and every leader embraces healthy firm engagement and is invested in sharing the culture and personal stories aligned with the firm values, mission, and goals with the team members they supervise. Senior leaders should encourage lower-level supervisors to "get real" with the employees they supervise, sharing helpful and relatable stories that can provide encouragement and build connection. Modeling and coaching this behavior to supervisors at every level of leadership builds organizational strength and becomes culturally contagious. These critical supervisory relationships should be carefully and consistently cultivated to prevent deterioration to the identification and acculturation process. If any link in the leadership chain is weak, the entire leadership chain is weak—the leadership actions taken in aggregate drive the employee identification and acculturation process.

Evidence gleaned from the research indicated that when the outlined leadership actions were engaged by all levels of leadership within the focal firm, employees experienced a sense of family, belonging, care, and value, and congruency between the firm and personal values. When one or more of these factors was experienced by employees, these experiences strengthened the identification and acculturation process for that employee.

Findings also illuminated factors that influenced the employee identification and acculturation process outside of the feelings the employee personally experienced in response to leadership actions. Factors that influenced an employee's ability to identify and acculturate included employee mindset and background. Additionally, the inability to share physical proximity with the focal firm leadership and co-workers influenced the identification and acculturation process. These findings showed that it is possible that leaders execute all leadership actions flawlessly, and yet some factors still hinder the employee's ability to identify and acculturate with the focal firm. Interestingly, the empirical findings found at least three cases where employees came to the focal firm with one or more barriers and overcame them to identify and acculturate with the firm successfully. This success resulted from leadership actions, and most explicitly, sharing personal stories and developing a solid relationship between leader and employee. In these cases, employees overcame the barriers and wholeheartedly identified and acculturated with the firm. In these instances, the employees became some of Chime's strongest cheerleaders.

Physical proximity was another significant barrier that emerged from the findings. Employees struggled with the lack of physical proximity to co-workers and supervisors. Employees hired after the onset of the 2020 pandemic struggled with understanding firm dynamics in this unique context and co-worker connection. Employees hired before the 2020 pandemic struggled more specifically with separation from co-workers and supervisors. Actions taken by the focal firm in this case study encouraged as much connection as possible via virtual opportunities, which may mitigate some of these feelings of disconnection. While the pandemic will wane and employees may eventually return to the workplace, the findings surrounding the importance of proximity provide thought into the workplace's future. It illuminates the importance of all leadership levels to ensure physical proximity does not manifest itself into emotional proximity. Senior leadership must set the tone for the organization and highlight the importance of connection. While employee factors may weaken the identification and acculturation process; doubling down on leadership actions is a viable strategy to overcome them.

Client inputs were also shown to have some influence on the identification and acculturation process. Naturally, the client firm desires to obtain the very best service from the focal firm employees who support their account. The client firm must equip the employees with the necessary process, procedures, and cultural information to represent the company well and excel in their job roles. When focal firm leaders are executing leadership actions to drive employee identification and acculturation, and the client is equipping the employees supporting their account adequately, there is no evidence of client inputs influencing that process negatively. However, the findings showed that if the focal firm leadership team <u>does not</u> adequately communicate and manage both the focal and the client firm's roles, employees can experience identity confusion, which weakens the identification and acculturation process. Evidence pointed to some confusion of focal firm employees when leadership failed to delineate *clearly* the roles of focal and client firms. As detailed in the literature, individuals have a strong desire and need for affiliation, belonging, or love, which can be satisfied through feeling that they are part of a group or company

(Ouchi & Jaeger, 1978). Extant research indicates that an individual is strongly identified with an organization when his identity as an organization member is more salient than alternative identities (Dutton et al., 1994). When employees are unclear about the role each firm plays in their employment, and if they do not feel that they are receiving clear direction from the focal firm, the identification and acculturation process may be weakened. When this occurs, an employee may begin to identify with the client firm because of the influence and constant exposure to client culture or fail to identify with either firm.

Based on the empirical findings in the case study, and as a final contribution to theory, Figure 9 provides a Firm Identity Continuum with which firm leadership can evaluate employees' status and improve identification and acculturation. Figure 9 depicts a continuum on which an employee is positioned, and Table 8 describes each employee state.

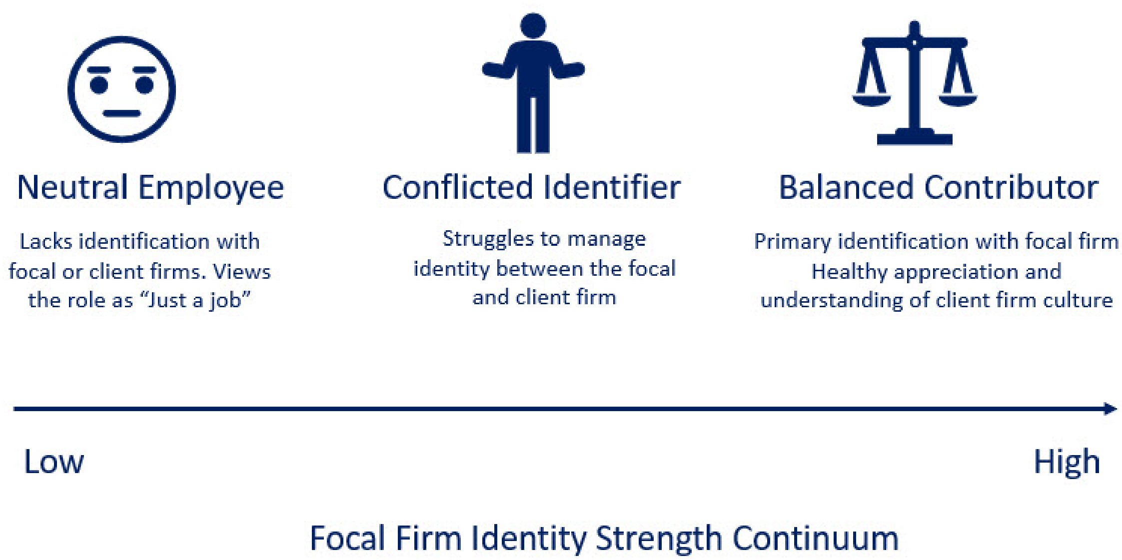

Figure 9: Firm Identity Continuum

Table 9: Firm Identity Continuum

State	Description
Balanced Contributor	This position represents the ideal state where the focal firm employee identities with their employing firm as primary but identifies closely enough with the client firm to serve with excellence.
Conflicted Identifier	This position represents employees who experience some confusion in terms of employment identification. The individual is employed by one firm and supports another full-time continually for an extended period. The employee is uncertain of the dynamics of this relationship and struggles to connect with either firm.
Neutral Employee	This position is the state where the employee neither identifies with the focal or the client firm. The employee may execute their job functions adequately; however, the "just a job" attitude is pervasive.

The **Balanced Contributor** is on the far-right side of Figure 9 and represents employees who positively identify with the employing focal firm and exhibit a healthy relationship with the supported client. This is the ideal status of firm employees as it strikes the appropriate identification balance between the focal firm and the client firm. The employee identifies closely with the focal firm as their primary loci of identity, but they have a strong appreciation for the client they support, helping them serve the client by providing excellent service.

The **Conflicted Identifier** in the middle of Figure 9 represents a point on the continuum where employees might be confused about the role each firm plays, and the employee in this position struggles to have a primary focal point of identification. This can occur when there is a breakdown by focal firm leadership responsible for communicating and managing the role of the focal and client firm in the employee's life. This was evident in this study when new employees received mixed messages in orientation and training about the firms' intricate relationships. The evidence showed that this produced uncertainty within the employee. This can occur if the focal firm is not steadfast in communicating client and focal firm roles and performing the other actions to entice employee identification and acculturation with the focal firm. When employees are confused about the roles and communication is not clear and consistent at all leadership levels, employees may become Conflicted Identifiers. If the focal firm fails to fully execute the prescribed leadership actions, there is danger of the employee falling into this camp.

An individual could also potentially land in the Conflicted Identifier camp if the client firm over-acculturates focal firm employees; however, there was no evidence of this occurring in this case study. Evidence showed that all clients provided the appropriate amount of interaction with focal firm employees to ensure they were equipped to perform their job roles with maximum success. The Conflicted Identifier is not an ideal outcome for employees as it thwarts identification and acculturation with the focal firm. Focal firms with employees occupying this position should strive to help employees move to the right toward the Balanced Contributor point on the continuum to increase identification and mitigate the risk of attrition. Firms can achieve this by strengthening their brand recognition with employees, including using corporate branded “swag” and ensuring they are capitalizing on the leadership actions shown in figure 8 designed to encourage acculturation with the focal firm. Extant studies have found that being a member of an organization can confer positive attributes to members, and people may feel proud to belong to an organization that is believed to have socially valued characteristics (Dutton et al., 1994). Elevating the Chime brand and its mission may encourage employees to move to the Balanced Contributor position.

The far-left position on the continuum of Figure 9 is entitled the **Neutral Employee**. This point on the continuum represents an area where employees show low identification with focal and client firms. In this area, many employees struggle with personal barriers to identification and acculturation, and they may view their role as “just a job.” There was evidence in this case study of individuals who embodied the “just a job” mentality for many reasons. Research has shown that while an employee may fail to identify, it is possible to continue with the exchange relationship (S. G. Scott & Lane, 2000). In that case, however, trust is diminished. The individual is prone to support the organization's goals only to the extent it benefits him (S. G. Scott & Lane, 2000). Moving individuals to the right on the continuum to the Balanced Contributor position is a desirable but challenging task for focal firm leadership because individuals often occupy the Neutral Employee position for reasons outside of the control of firm leadership. While not every Neutral Employee will blossom into a Balanced Contributor, three interviewees who had self-proclaimed barriers and who were firmly in this camp at the outset of their employment journey with Chime overcame to do just that. As the findings showed, barriers such as a fixed mindset, a disadvantaged background, lack of physical proximity, and a poor relationship between a supervisor and an employee weakened the identification and acculturation process.

VI.2 Contribution to Practice

This research yields important insights and a solid contribution to practice. To use in a practical setting, focal firms can apply the conceptual framework in their organization to encourage the identification and acculturation of firm employees. First, when a focal firm establishes a strong firm culture led by leaders who "buy-in" to the culture, the firm architects a solid foundation to encourage identification and acculturation. Next, when all leadership levels execute all leadership actions outlined in the framework clearly and consistently, these actions drive employee identification and acculturation. Leadership awareness of employee experiences and potential barriers can help gauge the strength of leadership actions. Identifying the weak actions promotes further emphasis to bolster identification and acculturation. Last, solid management of the relationship between the focal and client firm by focal firm leadership can help focal firm employees successfully manage the tension between identifying and acculturating with the focal firm where they work and the client firm they serve.

Next, the Firm Identity Continuum can be used by practitioners to gauge focal firm employee states. Employees who identify with the focal firm as primary while having a healthy regard for the culture of the client firm they support full-time for an extended period are considered Balanced Contributors. The Balanced Contributor is an ideal state for employees as this represents a win for both the client and the focal firm. Leadership can support Balanced Contributor employees by continuing to execute all five of the defined leadership actions. When leadership fosters communications and strong relations with this group, focusing on the employee/direct supervisor relationship, they advance focal firm ambassadors. For these employees, it is vital to continue to support them by providing the needed client information. Additionally, focal firm leadership must be mindful of growing these individuals in their roles with appropriate connection and growth opportunities.

For employees who present in the Conflicted Identifier position on the Firm Identity Continuum, focal firm leadership should use the conceptual framework to attempt to move these individuals to the right on the continuum to the Balanced Contributor position. To do so, leadership can execute on all five leadership actions recommended, paying particular attention to extra investment in the supervisor/employee relationship. Also recommended is ensuring clear communication to the employee about the dynamics of the working relationship between the focal firm and the client the employee supports. The supervisor's attendance at onboarding training and ongoing cultural and procedural training may help move the Conflicted Identifier to the Balanced Contributor position on the continuum.

The most challenging endeavor for focal firm leadership is working with individuals who associate with the Neutral Employee category. These are incredibly complicated because there are numerous reasons an employee may not identify or acculturate with a workplace identity. Many of these reasons are entirely outside of the control of the firm leadership. While moving employees from the position of Neutral Employee to Balanced Contributor may be difficult, the endeavor is not without value. To encourage employees toward the Balanced Contributor position on the continuum, focal firm leadership should undertake all five leadership actions described in the conceptual framework, paying particular attention to identifying and potentially addressing any employee barriers. This requires increased personal connection and care and an investment in a strong supervisor/employee relationship. To move individuals to the right on the continuum, supervisors must be willing to double down on the personal involvement in their investment of those they supervise. While efforts on relationship-building are essentially “free” from monetary investment, the investment in time and emotional energy is significant, and there are no guarantees that the investment will achieve positive results in every case. To achieve success in this situation, leaders must be willing to go “all-in” on the supervisor/employee relationship and accept that some employees will not choose to identify and acculturate with the focal firm regardless of their efforts.

VII CONCLUSION

In this research study, Chime Solutions did an excellent job of ensuring employees identified and acculturated with the focal firm and many interviewed could be labeled as Balanced Contributors. Leadership recognized the barriers many employees arrived with, and they did their best to combat them by doubling down on the leadership actions identified in the conceptual framework. In at least three documented cases, employees began with Chime Solutions with barriers that could have stunted the identification and acculturation process. In these three cases, the firm was able to break through the barriers and provide a clear path toward a Balanced Contributor for these individuals. This research does not assume that there are no other cases where leadership actions failed to break through barriers to help employees identify and acculturate but instead provides evidence that it is possible.

There was evidence of employees who could be defined as Conflicted Identifiers. These employees were generally newer to the organization and had less exposure to the culture due to the barrier of physical proximity. There was also one case of an interviewee who was characterized as a Neutral Employee. While happy to be employed and by all accounts successful at the job role, this individual exhibited signs of a fixed mindset and a “just a job” mentality.

This research offered a unique opportunity to investigate a current phenomenon that presents as a challenge in the field of Organizational Culture. While studies in the field of Organizational Culture abound, a scarcity of research existed examining the identification and acculturation process for firms that employ individuals who support a client firm full-time for an extended period. This case study examines the identification and acculturation process of a Business Process Outsourcing (BPO) firm operating in this manner. The research sought to discover how the firm balances the tension of acculturating employees with the focal firm while preparing and equipping employees with the processes, procedures, and necessary cultural elements of the client firm they support to deliver the highest quality of service possible to the client.

Five themes emerged from the empirical evidence as significant: Firm Culture, Leader Characteristics, Leadership Actions, Employee Responses, and other Identification and Acculturation Factors, including Employee Barriers and Client Inputs. Findings showed that a strong firm culture and leadership buy-in was paramount to the identification and acculturation process, and five specific leadership actions drove employee identification and acculturation with the focal firm. Findings also show that employee experiences and barriers and client inputs moderated the acculturation process.

As a result of the findings, contributions have been made to theory and practice. For a contribution to theory, this study added to the body of knowledge in the Employee Acculturation and Identification fields of study by offering a detailed empirical account of how a BPO firm acculturates employees with the focal firm while balancing the tensions of client culture. Empirical findings led to theory through proposition development, a conceptual framework, and a Firm Identity Continuum. A contribution to practice includes recommendations on applying the Conceptual Framework to increase identification and acculturation of employees. Finally, the research provides guidance on using the Firm Identity Continuum to evaluate employee identity strength with the focal firm and practical recommendations to firms for improving identity strength.

VII.1 Limitations

This research was not without limitations. I faced two primary limitations, the first relating to the specific company context, and the second relating to Covid-19. The unique company context of the focal firm made for a rich research setting. The culture is unusually optimistic and inspirational – a rarity in the business process outsourcing business. While the company is for-profit and led by astute and lucrative businessmen and businesswomen, the firm has an altruistic mission, is people-centric, and operates much like a family. It is a lovely and inspiring business environment that would be a welcoming work environment on all counts, but it is worth noting that the results, even in a like context, could be different depending on the leadership team's motivations, desires, and investment.

The second limitation posed multiple challenges because the research was conducted 100% virtually due to the global pandemic of 2020, which produced Covid-19, its new safety protocols, and social distancing. The pandemic affected the study in three ways. First, all employees were working remotely, and some who were interviewed had been hired since the pandemic began, so their perspectives might have been different had they previously worked in one of the three large call centers. Second, none of the interviews, meetings, or general research was conducted onsite at the client location. While conducting the research virtually was not part of the original research design, this materialized and impacted the research. I believe more insights could have been gleaned with face-to-face meetings and within the company’s ecosystem, and this limitation cannot be ignored. Finally, I conducted fewer interviews and observed fewer interactions than I had initially planned pre-pandemic. While the interactions and interview numbers were sufficient to arrive at reliable findings, the possibility of onsite interviews may have yielded more data collection.

VII.2 Future Research

Four future studies could further this research. The first one could include a replication study at another Business Process Outsourcing firm to test the study results in the same context.

Second, this conceptual framework and firm identity continuum could be applied to other contexts outside of the BPO space to explore its applicability. Other firms that face similar challenges, such as consultants who spend months with a single client, could provide additional insight into the identification and acculturation process and produce exciting results. Third, a study comparing a firm with a strong versus a weak firm culture could test the findings and provide additional insights. Finally, this research could be furthered in missional companies and applied in other contexts that strive to serve under-resourced areas.

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APPENDIX

Appendix A: Coding Schema

First Cycle Code	Second Cycle Codes	Themes
Family	Family-Oriented	Firm Culture
Founder-Owned/Led		
Entrepreneurial		
Generous		
Value Congruency		
Christian Values		
Fun	People-Centric	
Open		
Transformational		
Minority Business	Missional	
Contagious		
Inspirational Purpose		
Service-Oriented	Community-Focused	
Community-Oriented		
Authentic	Bought-In	Leader Characteristics
Transparent		
Growth Mindset		
Servant Leader	Servant Leader	
Aligned w/Mission & Values		
Inspiring		
Relatable	Relatable	
Caring	Caring	
Compassionate		
Encouraging	Encouraging	
Understanding		
Respectful		
Advocate	Accessible	
Accessible		
Flexible		

First Cycle Code	Second Cycle Codes	Themes
Implicit Communication	Communication	Leadership Actions
Explicit Communication		
Role Clarity		
Connection Opportunity Communication		
Communication at all levels		
Supervisor/Team Member Communication		
Compensation	Rewards/Incentives	
Personal Growth Opportunities		
Professional Growth Opportunities		
Orientation		
Recognition		
Celebration		
Service Activity		
Fun		
Personal Story Shares	Personal Connection	
Supervisor/Team Member Relationship		
Belonging	Sense of Care	Employee Experiences
Valued		
Cared for		
Family		
Connection	Shared Values	
Growth		
Congruency		
Shared Values		
Mindset	Employee Barriers	Identification and Acculturation Factors
Background		
Life Circumstances		
Physical Proximity		
Procedures, Processes, Cultural Info	Client Inputs	
Supervisor Visibility & Communication		

EXHIBITS

Exhibit A

The display of the UBUNTU philosophy in practice

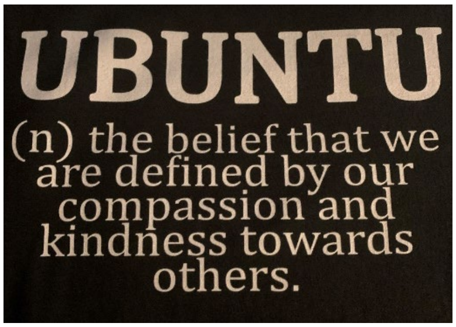


Exhibit B

The cover of the August edition of The Chime Times.

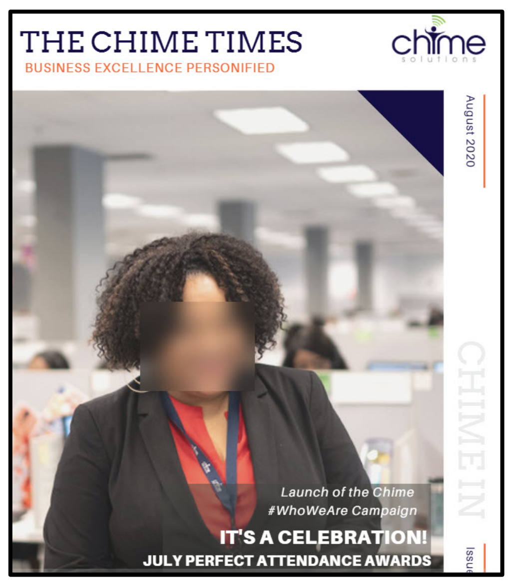
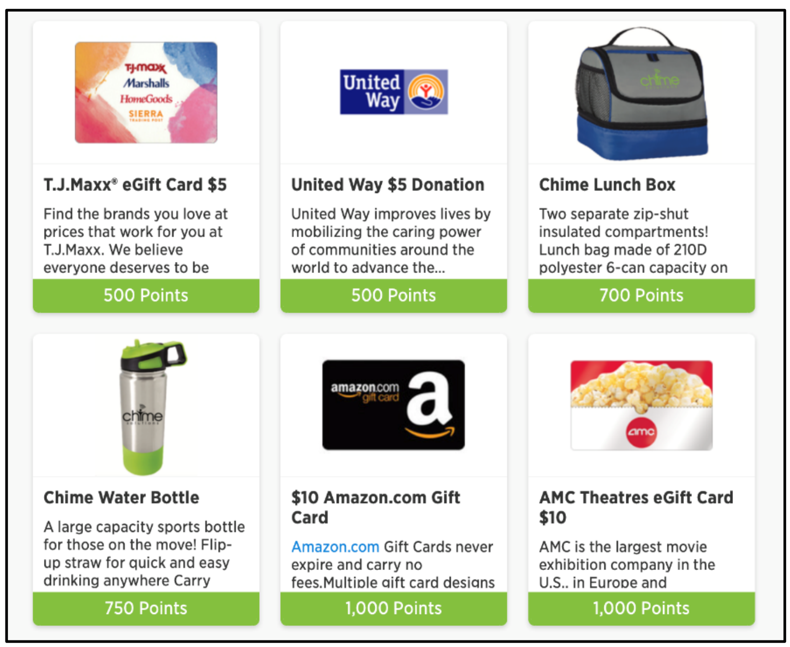


Exhibit C

The New Faces piece introduces new employees to the team each month.

Exhibit D

Chime uses Your Earner It (YEI) rewards to recognized employees and leaders for a job well done.



VITA

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EDUCATION

Doctor of Business Administration, J. Mack Robinson College of Business, Atlanta, Georgia, May 2021.

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PROFESSIONAL PROFILE OVERVIEW

Jonna Broscious Blount is a business professional with over 30 years' experience working in the Learning and Development space for numerous organizations. Dr. Blount currently serves as a Principal at Chick-fil-A, Inc. designing learning strategies for various internal audiences. Prior to joining Chick-fil-A, she established a consulting firm specializing in learning solutions aimed at driving positive business outcomes. To influence and foster a sense of lifelong learning in her own two children, Dr. Blount designed a comprehensive, personalized K-8 learning experience which she executed prior to their enrollment in high school. This is her greatest and most rewarding achievement.

CONFERENCE PRESENTATIONS

"Balancing Focal and Client Firm Employee Identification and Acculturation Tensions: Case Study Approach at a BPO Firm" Presented research in progress at the Doctoral Consortium and a Poster during the 10th Engaged Management Scholarship (EMS) conference hosted by Case Western University in September 2020.

"How Do Influencers Influence?" Blount, Gregory, Wilson, & Shah. The co-author presented a Poster during the 9th Engaged Management Scholarship (EMS) conference hosted by the Antwerp Management School in Antwerp, Belgium, in September 2019.