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**BUILDING MANAGEMENT BENCH STRENGTH:
A QUALITATIVE LOOK AT A JOB ROTATION PROGRAM**

by

PAIGE L. CREAGER

A dissertation submitted in partial fulfillment
of the requirements for the degree of

**Doctor of Philosophy
University of San Diego**

May 2007

Dissertation Committee

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ABSTRACT

Job rotation programs are known in the organizational development field as one of the primary components used in a successful employee development program. To date little research has gone beyond the quantifiable reporting of practices. The view of program participants has been unaccounted for, and consequently the organizational development field has lacked a holistic understanding of how employees succeed and fail in these programs.

This research offers a current perspective on job rotation: A means of accelerating the development of high potential employees in order to build a strong management bench. A qualitative grounded theory approach was used to investigate how, when, and why employees succeeded and/or failed in a management development, job rotation program of a national financial services organization. Interviews were conducted with the employees who graduated from the program to capture the perspectives of the participants.

The purpose of this research was to: (1) understand the employees' perspective of their experiences participating in a job rotation program, (2) identify the factors employees perceived as facilitating or constraining their ability to assimilate into, and be successful, within their program, and (3) identify the program factors they viewed as having contributed most to their succeeding in the job for which they were being prepared, as well as identify those factors missing from the experience that they felt would have been more supportive.

Findings suggest that the experiences and ultimate preparation of the participants to assume management positions were the result of the organization arrangements and

policies (structural factors), the beliefs and ideologies of the employees and participants (cultural factors), and the individual characteristics and actions of the employees and participants (agentive factors).

Ten significant interactions among structural, cultural and agentive factors emerged from the data, exposing complex relationships that offered explanations about sustainability of participant participation, hidden obstructers and facilitators of development goals, and unique challenges to the manager-in-training role. The results of this study are heuristic for those trying to ensure the capital and energy invested in job rotation programs are maximized, thus supporting organizational goals.

DEDICATION

This dissertation is dedicated to my family:

Gunder, Millie and Andy Creager.

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CHAPTER I

Introduction

Background to the Study

Bench strength, a term that is used in a variety of contexts, was originally coined by the sports world and refers to the number of players sitting on the bench during a game who can be substituted for a player; the greater the number of skilled replacements, the stronger the team's bench is considered to be. Bench strength as an expression has been adopted by the organizational development field to describe the quality and depth of the pool of employees in an organization that can replace other employees in times of retirement, turnover, and company growth. Bench strength can take on one of two meanings within an organization: It can be used to describe the overall organizational bench strength, which considers all employees in a company as potential replacements for all jobs; it can also be used, as in this research, to specifically focus on a particular type of bench strength -- managerial bench strength.

The subject of management bench strength has been a hot topic among industry professionals and scholars alike for several reasons. First, demographic trends from U.S. Census data suggest that the pool of management candidates in their prime grooming years (ages 35-44) will decrease 15% by 2015 (Barrett & Beeson, 2002; Byham, 2000). Second, in addition to facing a potential reduction in the availability of managers, organizations are also contending with the trend among modern employees to pledge their loyalty to their profession instead of a company (Lewis, 2003). This shift in loyalty forces organizations to either accept the flow of employees in and out of their company, or to find ways for employees to develop their profession within the organization.

Finally, organizations are reporting that company growth is not being constrained by lack of capital, but by a shortage of leadership (Bartlett & Ghoshal, 2002).

As trends threaten the ability of organizations to meet business objectives and secure longevity, many companies have responded by focusing on ways to develop internal reserves of capable managers. However, the need for management bench strength begs the question of how to establish it. Due to the costs and risks associated with external recruitment (Handfield-Jones, 2000), organizations are turning inward to develop employees in an effort to ensure their leadership pipelines are full and flowing (Charan, Drotter & Noel, 2001). Although the need to create a strong management bench has been recognized, at most companies adequate management bench strength has yet to be achieved.

Despite the current situation in which a gap exists between the desired and actual levels of management bench strength, research highlights some successful internal employee development methods. One of the most effective practices is the exposure of employees to a variety of developmental experiences (McCauley & Van Velsor, 2004). A brief list of examples of developmental experiences includes stretch assignments, formal coaching, action learning and job rotation.

The focus of this research is on one specific developmental experience: Job rotation. The term *job rotation* is known in the field of organizational development to have two applications. The first is a means of rotating employees through different jobs in order to reduce fatigue, boredom and injury. An example of such a program would be rotation within functions of assembly line work. However, this research is focused on the second use, which is rotation through different functions in order to cultivate employees

for overall potential and promotion. One of the primary goals is to create a solid base of talent that can be matched up to a portfolio of available jobs within a company (Garman & Glawe, 2004).

Given this definition, the majority of the literature on job rotation programs is limited to the perspective of industry experts and organizational practitioners. It is common for an article to suggest, from a big picture viewpoint, that job rotation is one of the components used in a successful employee development program. However, little research has gone beyond the quantifiable reporting of practices. Because the view of the program participants is unaccounted for, the organizational development field lacks a holistic understanding of how employees succeed and fail in these programs, as well as which aspects of the program best prepared the employees to assume the job for which they were being primed.

A dearth of literature examines the perspective of job rotation program participants. Burke and Moore (2000) added to the discussion on the perceived costs of job rotation programs. However, the basis of the research is a hypothetical model about perceptions of fairness and responses to job rotation; the authors being the first to point to the need to empirically verify their hypotheses. Monat (1975) conducted a study on police officers and their views concerning their employing organization, job and future prospects, determining that job rotation within the same police authority to be an important employment characteristic. Yet, there are limitations to the use of this study today in that it is based on organizational conditions in 1975 and looks at job rotation loosely as a change in job title or department that does not involve an increase in salary or grade level.

Current employee perspectives have been introduced into the literature with limitations. Opinions of *high flyers*, or top talent, on job transitions were introduced by Galpin and Skinner (2004). Their two-year study on the motivations and developmental preferences of this category of employees determined that they valued the opportunity to frequently change roles. Campion, Cheraskin, and Stevens (1994) measured the relationship between job rotation, potential career antecedents, and potential career outcomes. Findings suggested that higher rates of job rotation or interest in job rotation are linked to employees early in their careers. However, this study defined job rotation as a lateral transfer from job to job within a company. Van Vianen, Feij, Krausz, and Taris (2003) attempted to understand how personality factors affect job mobility in Dutch companies. The authors were unable to confirm that a positive relationship between emotional stability, conscientiousness, openness to experience, and adult attachment style to job rotations exists. A positive link between sensation seeking and job rotation was unsupported as it was found that people changed jobs for reasons of dissatisfaction. The underlying limitation of these studies is they do not consider the needs of the modern organization that utilizes the concept of job rotation as a purposeful, organized program to build management bench strength.

Statement of the Problem

Job rotation programs require a great deal of financial and human resources to be successful. In order to minimize the associated costs and maximize the benefits, there is a need to more fully understand how, when, and why employees succeed and/or fail in these programs. However, the viewpoint of the employees is absent in the literature. Devoid of this perspective, organizational development practitioners and theorists will

continue to work with limited information. This sets up a situation in which program managers are left hoping that their job rotation program is working instead of being certain about which aspects of the program are contributing to building managers and which aspects are hindering the process. Without this information, job rotation programs will not be able to sustain their full capabilities in contributing to management development. Further, there may be negative consequences for the companies and the individuals involved as the capital and energy invested are put at risk.

Purpose of the Study

The purpose of this study was to better understand the employee experience of participating in a job rotation program. Using qualitative methods, the goal of the study was to understand, from the employees' perspectives, what factors facilitate and constrain employees from assimilating into, and being successful within these programs.

The following questions guided the study:

- 1) What do employees say their experiences are in participating in a job rotation program?
- 2) What factors do employees perceive as facilitating or constraining their ability to assimilate into, and be successful, within their program?
- 3) What factors from the program experience are perceived as having contributed most to the participant succeeding in the job for which they were being prepared?

What factors were missing from the experience that would have been more supportive?

CHAPTER II

Review of the Literature

Recent trends suggest that a decrease in the number of middle managers, combined with a decrease in employee loyalty to companies, threatens the ability of an organization to meet business objectives and secure longevity. In response, organizations have begun to focus on ways to develop employees internally, thus creating management bench strength. A frequently used employee development method is job rotation. Three main issues that dominate the current literature on job rotation programs will be reviewed: The need to improve internal employee development, the use of planned experiences as a development tool, and perspectives on job rotation programs from thought leaders and participants. Also included in the review is literature related to the analytical framework used in this study: Structure, culture, and agency. The overall purpose of this research is to help close the gap between the theoretical and practical understandings of employee development in efforts to build management bench strength.

The Need to Improve Internal Employee Development

As previously suggested, the need to develop reserves of capable managers has become a recognized priority among companies and industry professionals. Succession management and leadership development were rated as the top two priorities for 89% of the organizations researched by the Corporate Leadership Council (2004). Talent management, correspondingly, was one of the top three trends of 2005 in the human resources field according to HR Focus (The Top, 2005), an industry publication. There is good reason for giving this issue precedence: Only one-third of the participants in the Conference Board research on developing business leaders rated the ability of the

leadership capacity of their company to meet business challenges or respond to sudden change as excellent or good (Barrett & Beeson, 2002).

There is significant variation among consultants, industry experts, and organizational practitioners in terms of the language used to label internal employee development strategies. Among these names are succession management and talent management (Berke, 2005; Conger & Fulmer, 2003; McCauley, 2005; Morton, 2005). Succession management is the active process of managing workforce needs through the identification and development of successors at all levels of an organization (Berke). Talent management is a phrase that has recently gained popularity and refers to the integrated management of workforce planning, talent gap analysis, recruiting, staffing, employee education and development, retention, talent reviews, succession planning, and evaluation (McCauley). Although succession management and talent management are distinct labels, they tend to be used interchangeably in the literature because they share the goal of creating pools of candidates with high leadership potential (Peterson, 2000), otherwise known as building company bench strength. However, regardless of the term used, one problem ultimately underscores the need to improve internal employee development efforts: Philosophies about developing employees internally are not consistent with the realities of operationalizing these practices in the workplace (Bartlett & Ghoshal, 2002; Charan, 2005; Morton).

Discrepancies Between Theory and Practice

Even with the availability of succession and talent management benchmarking information, discrepancies still exist between the theories on development strategies and the reality of development practices in the workplace. For example, despite the rhetoric

about development systems, a significant number of companies do not actually have functional systems in place (Bartlett & Ghoshal, 2002; Corporate Leadership Council, 2004; Dell & Hickey, 2002; Muson, 2004; Ritter, 2003; Wells, 2003). General Electric is considered to be one company that does have measures in place to successfully develop and maintain management bench strength. However, even though many people talk about emulating the practices of General Electric, very few put in the effort necessary to make it happen (Charan, 2005). Additionally, existing succession systems often are not linked to strategy in organizations and/or to the needs of the business units (Garman & Glawe, 2004; Karaevli & Hall, 2003; McCauley, 2005). In some cases, even within the companies that do have links between elements of succession development and strategy, the developmental elements used to carry out various strategies, such as leadership competencies, are not understood by the employees (Barrett & Beeson, 2002).

Research states that the ability to identify future leaders early in their career is important to the maintenance of a future for an organization. However, most line managers and human resources departments do not have the level of discernment needed to recognize these employees (Barrett & Beeson, 2002; Charan, 2005; Ellis, 2003). Research also suggests that effective succession systems should have a component of employee development such as job assignments, development plans, coaching, mentoring, and 360-degree (multi-rater) performance reviews. However, review of practice indicates that these development components are often not being fully carried out (Chambers, Foulon, Hankin, & Michaels, 1998; Pollitt, 2005; Vloeberghs, Pepermans, & Thielemans, 2005). Survey research by McKinsey and Company revealed that only 10% of the 6,000 executives who took part in the study felt that job assignments were

effectively used by their companies (Handfield-Jones, 2000). Further, in terms of the actual employee development plans, it has been found that very few employees find their plans to be challenging and/or applicable. Additionally, 360-degree performance reviews of employees are not utilizing at least three sources of feedback which is considered the standard for ensuring that a performance review is gathering information on the employee from multi-raters (Corporate Leadership Council, 2003).

Lack of accountability is another example of how philosophies about employee development do not translate into practice. Although corporate officers believe that companies should hold their line managers accountable for the quality of development, very few believe that their companies actually do so (Chambers et al., 1998). Daily operational demands often supersede time devoted to employee development which causes the tracking of employee development by managers to vary from company to company (Karaevli & Hall, 2003). Additionally, the reality of the inability of many managers to have an honest conversation with employees about their developmental needs (Steeves & Ross-Denroche, 2003) in a timely manner (Corporate Leadership Council, 2003) can inhibit their development and cause a fundamental disconnect between the theory and reality of development practices.

Finally, the inefficacy of available research on succession and talent management practices constrains important practices from being adopted by more organizations. The research consists mainly of case studies of the limited number of companies that are considered to have model succession planning systems (Garman & Glawe, 2004). Findings have further been characterized as anecdotal (Morton, 2004) and normative, without empirical underpinnings (Vloeberghs et al., 2005). Generalizability of succession

planning models from this limited number of companies is not realistic for the numerous other, often smaller, non-best practice companies that struggle with the question of how to effectively build management bench strength.

Barriers to Operationalization

The lack of connection between theory and practice in the area of personnel development threatens an organization's ability to achieve its strategic objectives (Bartlett & Ghoshal, 2002). From an outsider's perspective, it may seem like an easy fix to just make the connection happen. However, in the literature a number of distinct barriers have been identified that cause or contribute to the disparities.

One of the most critical aspects of building bench strength is talent retention. It is futile for organizations to devote efforts and resources on building a strong management bench without devising measures of safeguarding the reserve of talent that has been created. In highly decentralized companies, a tendency often exists to be unaware of what is occurring in regards to retaining talent (Morton, 2004). When the number of departments or divisions in a company reaches upwards of 50 or 100, the company does not know if it is losing good, great, or average people (Fishman, 1998).

The organizational political climate also serves as a barrier to operationalization because succession practices are for the benefit of the company as a whole and political agendas can get in the way through a variety of means -- manager conflicts, distrust of colleague decisions, and withholding of information about star employees in order to retain them within a certain department for the benefit of the manager's operations (Garman & Tyler, 2004). The underlying issue surrounding political conflict is the

question of who owns the talent -- the organization or the department manager (Kesler, 2002).

Finally, perceptions as to the lack of credibility evident in many human resource departments have a significant impact on the inability to operationalize theory. The human resources department has a reputation for not understanding the mechanics of business (Liebman, Bruer, & Maki, 1996). Therefore, when something is considered to be a human resources initiative, the lack of respect for the department can result in business units or line managers not buying into the process (Hirsh, 2000; Liebman et al.). Additionally, a CEO will at times determine that his or her organization is in need of some type of succession or talent management program, but instead of championing the program, “dumps it” onto the human resources department (Guenther, 2004). Progress fails to become initiated because a program seen as sponsored by human resources may take a back seat to the immediacy of organizational challenges due to the lack of support from employees (Garman & Tyler, 2004).

The Use of Planned Experiences as a Development Tool

Discrepancies between development theory and practice mean that business needs are not, and will continue to not be met, due to a lack of leadership talent. However, confirmation exists that developmental experiences work. There is evidence that people learn, grow, and change across their careers (Lombardo & Eichinger, 2000), which justifies the allocation of resources for the development of leadership talent.

Progression of the Research

The use of planned, or on-the-job experiences as a development tool gained momentum in the 1970s. One of the catalysts was the seminal, long-term study by Bray,

Campbell, and Grant (1974) that assessed the impact of developmental opportunities on managers at AT&T. In 1956, a group of managers were rated on dimensions of performance effectiveness and in 1974, follow-up assessments were made. It was found that a greater percentage of those who were assessed as low on effectiveness were promoted than those who were assessed as high on effectiveness, if they had experienced better development opportunities.

In the 1980s, researchers and practitioners began to grapple with the merits of formal management training versus learning from on-the-job experience. Driven by the uncertainty of whether formal management training is either used, or used in an effective way, Davies and Easterby-Smith (1984) conducted interviews with middle and senior managers to understand their developmental experiences. The most significant finding was that placing managers in novel situations with problems for which their range of behaviors is considered inadequate forced them to develop new ways of dealing with situations. The novelty came from either a move into a new job or through the addition of experiences into an existing job.

Wexley and Baldwin (1986) conducted a review of the literature that examined management development by breaking it up into three areas: Management education, management training, and on-the-job experiences. This was one of the first articles to broadly incorporate the possibility that on-the-job experiences were as valuable to management development as the typical off-the-job forms of management education and management skills training that were prevalent during the time.

Two years later, Keys and Wolfe (1988) published a literature review that further reviewed the trends in management education and development and posited that most

learning by managers occurs on the job. They noted, however, that on-the-job learning can be undirected and end up reinforcing past behaviors and attitudes, rather than instilling new ones. As in Wexley's (1986) article, mentoring and action learning were mentioned as the predominant methods of formal on-the-job learning.

Today, managers continue to cite job experiences as their primary source of learning (Ohlott, 2004). Research on self-reports from executives who had been differentiated from their peers and identified as successful found that the executives reported having about twice the variety of on-the-job leadership challenges (Lombardo & Eichinger, 2000). Handfield-Jones (2000) was specific about the kinds of jobs that were considered by executives to have been among their five most important experiences: A new position with large scope, the turning around of a business, the starting of a new business, a high-profile special project, and the expansion of a business by 20% or more (p.5).

As learning from on-the-job experiences is recognized as influencing individual and organizational success, developmental experiences are being formalized into business practices and organizational strategies. Research by the Corporate Leadership Council (2003) suggests a direct link between development opportunities provided by an organization to leaders and the overall strength of the leadership bench. A comprehensive review of the literature produced by the Center for Creative Leadership (Eastman, 1995) revealed that effective succession management practices include plans for developmental job assignments and are part of a broader management development effort. Berke (2005) followed up Eastman's review and found development to be a core process of succession management. However, updates to development methods included action learning, cross

functional assignments, and blended learning of classroom, on-the-job, and e-learning experiences.

The use of development opportunities is considered to be a best practice of leading organizations as a means of ensuring the maintenance of a leadership pipeline (Byham, 1999; Caudron, 1999; Conger & Fulmer, 2003). Additionally, several annual studies have been published that compare the common practices of top companies with their less successful organizational peers in their efforts to develop quality leaders. For example, Hewitt Associates (2005) surveyed 373 public and private companies and found correlations between financial performance and leadership development practices. They discovered that 89% of the top 20 companies grow the employees they consider to have high potential through developmental assignments, while only 43% do so at other companies. Parallel results were found in a similar study by Hewitt Associates for European companies in 2003 (Hewitt, 2003) where 70% of the top ten companies used developmental assignments compared to 46% of the other companies.

Even with the rather robust body of literature that points to the successful relationship between developmental activities and quality leadership, criticisms of developmental activities exist as well. For example, research that focuses on outcomes of developmental activities is still considered by some to be in relatively early development (Garman & Glawe, 2004). Further, Vloeberghs et al. (2005) found in studying development policies of high potentials (top talent) that most programs have an ad hoc nature and development activities such as job rotation, coaching, and mentoring are not easily traceable or identifiable to effective leadership.

Despite the debate over progress made in employee development, a new focus has emerged on not just how to create developmental opportunities, but on qualities and skills that can or should be developed: Self-management capabilities, social capabilities, and work facilitation capabilities. Self-management includes self-awareness, the ability to balance conflicting demands, the ability to learn, and leadership values (Van Velsor & McCauley, 2004). Social capabilities encompass the ability to build and maintain relationships, the ability to build effective work groups, communication skills, and the ability to develop others. Finally, work facilitation capabilities are comprised of management skills, the ability to think and act strategically, the ability to think creatively, and the ability to initiate and implement change (Van Velsor & McCauley).

In addition to considering the progression of the development research to this point, Conference Board research (Barrett & Beeson, 2002) suggests two future trends in management development. First, in projecting the development of business leaders for 2010, the emphasis for organizations will be on experiential learning with job-related assignments and experiences. Second, customized development for individuals based on their strengths, needs and career potential requirements will be central to the training process.

Current Examples of Planned Development

There are many types of planned development experiences, and for the scope of this research, four that are considered to be significant to management development are reviewed: Job rotation, critical career passages, competencies, and specialized talent pools.

Job rotation. Job rotation programs move people through assignments systematically. The scale of the programs varies depending on the size and needs of the organization. There is also a great deal of flexibility inherent in the design and purpose of the programs. For instance, the goal of one program may be to develop employees for future leadership capability while the goal of another may be to ensure that top performers are given opportunities to stretch and develop without the intent for management (Ohlott, 2004). Job rotation should also be distinguished from cross training. The goals are similar in that both designs teach employees a number of skills; they differ as the purpose of cross training is to only assign someone a variety of tasks or positions (Kirk, Downey, Duckett & Woody, 2000).

There are benefits and costs associated with job rotation programs. A review of the literature by Campion et al. (1994) found the benefits of job rotation programs to be an increase in employee satisfaction, motivation, involvement and commitment, as well as improved organizational knowledge, contacts in other areas, personal development and opportunities for variety, challenge, and achievement. However, along with the benefits come the costs of the program which include training expenses for teaching employees new jobs, increased errors made as employees learn new jobs, and loss of efficiency due to low specialization and repetition. It is also suggested that rotational assignments may foster short-term perspectives on problems and solutions. Productivity losses and workload increases that occur for the area of the organization that loses an outgoing employee, as well as the gains that occur for the area that receives a new employee have also been cited as some of the costs and benefits associated with rotations. Interviews suggest that there needs to be a balance between developing the employees and getting

the job done. A more recent review by Biederman (2005) summarized costs associated with employee relocation and administrative costs and challenge to management of ramping people up and then back down again.

Critical career passages. The concept of critical career passages is a second type of development experience and is based on the career-crossroads model that supports “the natural hierarchy of work that exists in most organizations” (Charan et al., 2001, p.6). The career-crossroads model takes into account the development needs of the entire organization and provides guidelines and a language for developing employees based on different types of potential. The premise of this model is to make certain that people are working, and being placed, in situations that are at the appropriate level for their skills and experiences, which ensures that the resources and opportunities utilized are matched to the correct employees. While some levels can be collapsed depending upon the specific makeup of an organization, there are essentially six critical levels: (1) manage self, (2) manage others, (3) manage a function, (4) manage a business, (5) manage a group, and (6) manage an enterprise (Charan et al.). The career-crossroads model provides a coherent understanding of the shifts in intellectual and emotional demands that come with each new level of management. Each crossroad can be carefully planned for and is deliberate by design (Kesler, 2002).

Competencies. Competencies are defined as the knowledge, skills, and attitudes that affect a job, role, or responsibility (Barber & Tietje, 2004). They are used by organizations to define the types of training needed to develop people for specific jobs. They also give organizations a framework for benchmarking behaviors, outcomes, and activities that can be visibly measured (Conger & Benjamin, 1999; Guenther, 2004;

Guinn, 2000). However, the use of competencies has mixed reviews and is considered to be controversial (Fulmer, Gibbs, & Goldsmith, 2000). Competencies have been criticized on the grounds that in the creation of universal criteria, the ability to individualize to situations and levels is lost (Conger & Benjamin). Other criticism is based on an aversion to the increased degree of complexity that competencies have taken on. Despite good intentions of making areas of development more focused and streamlined, the number of competencies adopted by an organization are often too numerous and have lengthy defining criteria that make them difficult for employees to operationalize. As quoted by Kesler (2002), “A top HR executive recently said, ‘We need to get out of the competency business. Our executives can’t relate to competencies’” (p.38).

Specialized pools. Other means of development include the creation of specialized pools that allow companies to focus development efforts on larger groups of employees versus select, highly visible achievers (Karaevli & Hall, 2003). Although there is some variation in types of pools, there is a tendency in the literature for the term *pool* to be a catch-all phrase for the grouping of employees together for specific development purposes.

Byham (2000) is very clear about the types of employees that constitute acceleration pools which aim to develop groups of high potential employees for undefined executive level jobs. Other types of pools include talent pools, where, unlike the focus on the executive level of an acceleration pool, there is more flexibility and preparation of employees for a greater variety of positions within an organization (Walker & LaRocco, 2002). Finally, at times a pool is referred to less in terms of a formalized program, like an acceleration or talent pool, and more as a general approach to

developing a reservoir of qualified candidates who can fill vacancies (Taylor and McGraw, 2004)

Regardless of the development option chosen, all processes need to be linked to the organizational strategy, maintain accountability of executive and line management for development, and link development efforts to the succession process of the organization (Berke, 2005). This research focuses on the planned experience of job rotation. However, further investigation of the program participants is necessary for job rotation to contribute to the creation and maintenance of management bench strength.

Perspectives on Job Rotation Programs

Job rotation programs are an internal development strategy that while cited frequently in the literature, remain somewhat of a mystery in terms of what truly makes a program successful. What we do know about the programs has been defined by two sources of information: (1) The outside perspectives of the researchers and practitioners who discuss program frameworks and quantify use of the programs in organizations, and (2) the inside perspectives of employees who have participated in job rotation programs.

Perspectives of Researchers and Organizational Practitioners

Reporting on job rotation tends to lack detail about actual job rotation practices. For example, several authors mention job rotation in the context of general organizational development best practices (Biederman, 2005; Gale, 2001). Others cite best practices from empirical research, such as the Conference Board study (Barrett & Beeson, 2002), which revealed the future needs of organizations in developing of business leaders in 2010 to include the planned movement of future leaders, an example of which is job rotation. Fifty percent of the top ten companies for leaders as ranked by Hewitt

Associates (Hewitt, 2003) use rotational assignments to develop their high potential employees. Conger and Fulmer (2003) conducted a review of what the best practices were in organizations that combined succession management with leadership development and came up with several prescriptive rules; one rule being to focus on development in which job rotation is mentioned as a technique. In researching the high potential development policies of Belgian companies, Vloeberghs et al. (2005) found job rotation to be one of the most frequently mentioned developmental activities used. While important to know which companies use job rotation and why, this information alone is insufficient in furthering our understanding of how and when these programs are successful.

Amidst the perspectives on job rotation, there is some research that talks about the reasons for use. Biederman (2005) found that companies use job rotation as a retention tool, to create employee value, and as a way for employees to make connections company-wide. Job rotation also allows employees to broaden their skills (Biederman; Hirsh, 2000). Kirk et al. (2000) discuss job rotation in the context of career development interventions. Job rotation is also an on-the-job experience believed to contribute to the creation of adaptable executives which is cited as a measure of success (Ohlott, 2004).

The most frequently cited group of employees to participate in job rotation programs are high potential or top talent individuals (Barrett & Beeson, 2002; Byham, 1999; Gale, 2001; Kirk et al., 2000; Vloeberghs et al., 2005). This has positive implications as it demonstrates that current research is incorporating an age-old concept, job rotation, into modern organizational practices with the new purpose of establishing bench strength (Byham, 1999).

Perspectives of Participants

In order to advance our understanding of how, when, and why job rotation programs contribute to employee development, research must go beyond the macro view of quantifying practices and further investigate the perspective of the program participants. In fact, the research from this outlook is so limited that articles have tried to fill the void by creating hypothetical situations and models to try and understand the experience. Burke and Moore (2000) developed a model about perceptions of fairness and responses to job rotation decisions through a framework of organizational justice. The perspective is not of the employees, but of those who work with employees who are rotated. The article adds to the discussion on costs of job rotation programs by hypothesizing that the perceived costs of the nonrotated employees are increased due to workload, decreased productivity, decreased satisfaction and motivation. The authors suggest, however, that there is a need for further empirical verification of these findings.

The literature is also restricted in terms of qualitative findings of the experiences of employees with job rotation. Monat (1975) conducted a study on police officers and their views concerning their employing organization, job and future prospects. It was found that job rotation within the same police authority is an important employment characteristic. Job mobility was considered a satisfactory experience for a certain number of officers (although the number is not stated). According to interview and questionnaire data, the researchers found that certain officers felt they were being moved too quickly from one job to the next. However, a limitation of this study is that it is based on organizational conditions in 1975 and looks at job rotation loosely as a change in job title or department that does not involve an increase in salary or grade level.

Findings from a two-year study by Galpin and Skinner (2004) on the motivations and developmental preferences of *high flyers*, otherwise known as top talent, concluded that job rotation is rated second by this group as the preferred method of development. Although the article does not cite what the most preferred method was, the employees did indicate that they value the opportunity to frequently change roles, which is in contrast to Monat's (1975) findings regarding concerns over the rate of job transitions.

A small set of research links individual factors and job rotation. Campion et al. (1994) measured the relationship between job rotation, potential career antecedents, and potential career outcomes. Findings suggested that higher rates of job rotation or interest in job rotation are linked to employees who are early in their careers. However, this study defined job rotation as a lateral transfer from job to job within a company. Van Vianen et al. (2003) attempted to understand how personality factors affect job mobility in Dutch companies. Their study incorporated subjects from multiple companies as well as occupational fields. The authors were unable to confirm that a positive relationship exists between emotional stability, conscientiousness, openness to experience, and adult attachment style to job rotations. A positive link between sensation seeking and job rotation was unsupported as it was found that people changed jobs for reasons of dissatisfaction.

Thus, the literature on job rotation programs emphasizes high level reporting of practices and ignores the view of the program participants. As this perspective continues to remain unaccounted for, the organizational development field lacks a holistic understanding of how employees perceive they have succeeded and failed in these

programs, and which aspects of the program were most helpful in preparing employees for their subsequent position.

Analytical Framework: Structure, Culture, and Agency

In order to elicit the most comprehensive understanding of employee experiences in job rotation programs, this research employed the analytical framework of structure, culture, and agency. The purpose of this section is to review the literature on these frames in the context of organizational development to show the value each brings to the analysis of employee development.

Structure

Until 1920, most thinking about organizations was structural in nature. The earliest organizations were dictated by the structures of the military, the Catholic Church, and European governments (Gordon, 1996). With the industrial revolution came efficiencies in the workplace which sparked new schools of thought on organizational structure guided by the works of Taylor, Fayol, Barnard, and Weber, and their prescriptions based on administrative theories (Lounsbury & Ventresca; 2003). Although the study of human relations did find a presence in the organizational development field beginning in the 1920s (Gordon), it was the rise of management and business schools in the 1970s that once again put an instrumental and functional focus back on organizations (Lounsbury & Ventresca).

Current thinking about organizational frames is still based on the belief that formal structures have the ability to mitigate issues and facilitate employee performance. There are six assumptions underlying this perspective:

(1) Organizations exist to achieve established goals and objectives, (2) organizations increase efficiency and enhance performance through specialization and a clear division of labor, (3) appropriate forms of coordination and control ensure that diverse efforts of individuals and units mesh, (4) organizations work best when rationality prevails over personal preferences and extraneous pressures, (5) structures must be designed to fit an organization's circumstances (including its goals, technology, workforce, and environment), (6) problems and performance gaps arise from structural deficiencies and can be remedied through analysis and restructuring. (Bolman & Deal, 2003, p.45)

There are also structural assumptions specific to succession and talent management theory. They are derived from different perspectives because the general cross-section of views on succession practices has yet to produce a coherent standard for the industry. A comprehensive literature review produced by the Center for Creative Leadership (Eastman, 1995) summarized the commonly reported practices of succession planning, creating one theoretical standard. Conger and Fulmer (2003) constructed a second framework by studying best practice organizations that combine succession management and leadership development. A benchmarking study conducted by the American Productivity & Quality Center and the Center for Creative Leadership (McCauley, 2005) introduced the elements of talent management in best practice organizations, resulting in the third framework.

Eastman's (1995) findings reveal that effective succession practices are well embedded in an organization by being integrated with other human resources systems,

supported by the executive team, owned by line management with the support of staff, tailored to unique organizational needs, linked with a strategic business plan, and part of a broader management development effort. Succession practices also focus on the employee by including developmental job assignments, incorporating employee input, being based on competencies and objective assessment of candidates, and evolving from a thorough human resources review process.

Conger and Fulmer (2003) take a more streamlined approach to employee development with the long-term management of talent as the goal. Like Eastman (1995), the elements of flexibility, development, and measurement of progress are present, but two new aspects are introduced: The identification of linchpin positions and the need for transparent processes. Focused on talent management, the benchmarking study by the American Productivity & Quality Center and the Center for Creative Leadership (McCauley, 2005) is also similar to Eastman's findings regarding succession planning. The two frameworks share the conclusions of the need for a comprehensive system, support from top management, the use of competencies, and system-wide monitoring and evaluation. They diverge, however, as the American Productivity & Quality Center and Center for Creative Leadership study add in the components of focusing on the most highly valued talent, defining talent management broadly, and excelling at the recruitment, identification and retention of talent. While each of the three frameworks explains succession and talent management from a limited perspective, it is the integration of the perspectives that provides a coherent method of exploring current perspectives on the structures that guide thinking about employee development.

Culture

Structure provides one frame for analysis of organizational issues, but the culture picks up where structure leaves off by considering human emotions and behaviors which are neither always rational nor always supportive of organizational policies and practices such as management development efforts. By definition, culture is the shared learning of a group as well as the group members' total behavioral, emotional, and cognitive functioning (Schein, 1992). Part of what guides group behaviors are norms, or shared expectations about actions members of the group take in certain situations (Higgins & Gordon, 1985). One of the determinants of the strength of a normative culture is the degree of regulating power a norm has over the behavior of the group members. Figure 1 illustrates the phases of a norm (Higgins & Gordon).

Figure 1

Phases of a Norm

<i>Nonexistence</i>	0	No norm exists, nor has been proposed, nor has been instituted.
<i>Proposal</i>	1	Proposal <i>or</i> institution by authority or policy. An individual or organizational entity proposes a norm for group acceptance or institutes a norm for group acceptance.
<i>Acceptance</i>	2	Having an ideal. A norm is accepted as an ideal or policy of the group but neither formally nor informally agreed to.
	3	Having an agreement. A norm is accepted and either formally or informally agreed to, but it is not yet an expectation, that is, considered binding on members.
<i>Expectation</i>	4	Having an expectation. A norm is assumed to be accepted and is expected to be upheld, that is, considered binding on members.
	5	Being disappointed. A norm is expected and considered binding on members and when it is <i>not</i> upheld members are disappointed.
<i>Enforcement</i>	6	Expressing disapproval and/or attempting persuasion. A norm is expected and is considered binding on members and informal attempts are made, including public disclosure, to persuade nonconformers or violators to live up to the established norm.
	7	Calling for punishment or reporting. A norm is expected and individuals bound by its use agree upon or formal procedures for reporting or calling for the punishment of nonconformers or violators.

Failure to estimate the degree to which norms are guiding a group results in an incomplete study of a group. One way to be thorough when examining culture is through the use of the socio-cultural conception which is founded on the belief that knowledge is socially constructed. Structure may create frameworks and formal procedures, but the socio-cultural view looks at what these functions do to serve people and/or groups and how the groups interact and respond to the structures. This type of analysis is also known as assuming a *semiotic* view; semiotics being the science of signs (Geertz, 2000). Geertz, a cultural anthropologist, introduced the term *thick description* to explain his own method of research, which is observation of a culture in which access to this culture is gained through semiotics. His work reveals a caution to those who examine cultures: All cultural interpretations made by a researcher are constructions of constructions of those being observed (Geertz).

Schein's (1992) socio-cultural research is also directed at interpreting and understanding organizational life. He describes the evolution of organizational culture as a two-part process: (1) The culture is instilled by the founding member through a variety of embedding mechanisms, then (2) once the norms, structures and processes are completely embedded in a successful organization, the reverse comes true as culture then characterizes leadership instead of leadership defining the culture (Schein, 1992). This progression of culture underscores the need to be cognizant of situations in which authority and systems become constrained by cultural norms.

Organizational cultures are often characterized by organizational *climates* which are psychological descriptions characterizing a system's practices and procedures (Schneider, 1975). Climates of customer service, safety, innovation, and ethics have been

subject to study over recent years (Dickson, Smith, Grojean and Ehrhart, 2001; Victor & Cullen, 1988). Because climates are internally defined by group members, questionnaires are often employed for assessment purposes. Climate questionnaires are built on the assumptions that: (1) Organizations and subgroups within organizations develop different institutionalized normative systems, and (2) although not completely homogeneous, these normative systems are known to organizational members sufficiently well to be perceived as a type of work climate (Victor & Cullen). Organizational climates have implications for the employee development process because once the climate has been assessed, factors that created the climate, and are keeping it fixed, can be explored. Thus far, research has shown normative structures, referent others, obedience to authority, responsibility for consequences, characteristics of the job, and corporate policy as influencing organizational climates (Trevino, 1986).

Agency

The third lens that contributes to an understanding of the success or failure of organizational policy and practice is agency, which shows how actions and behaviors of individuals influence events. Taking an agentic perspective on employee development, we can understand how people construct their own experiences and how their actions impact both the structure and culture of an organization. By examining individual actions, backgrounds and dispositions, we gain a more thorough understanding of employee development strategies aimed at preparing individuals for leadership positions.

Understanding what drives behavior is complicated but one phenomenon has widespread implications for organizations: Individuals will go to great lengths to avoid or alleviate anxiety (Wells, 1995). This can manifest as holding onto past assumptions,

blaming authority, scapegoating, externalizing the enemy, denying the problem, jumping to conclusions or finding a distracting issue. Employing these defense mechanisms restores stability for individuals and feels less stressful than facing and taking responsibility for a complex challenge (Heifetz, 1994).

Behavioral considerations are also significant because personnel development efforts are often associated with changes to structure or culture. The greatest impact on the success of organizational change comes from the understanding of and ability to manage people through the psychological process that change brings about (Bridges, 2003). Awareness of what is going through the minds of individuals helps alleviate surprises in program execution because new insights often fail to get put into practice because they conflict with deeply held internal images of how the world works; images that limit us to familiar ways of thinking and acting (Senge, 1990).

Assumptions about rationality are often cited as underlying individual actions. Argyris (1992) suggests there is a universal human tendency to design one's actions consistently according to four basic values: To remain in unilateral control, maximize winning and minimize losing, suppress negative feelings, and be as rational as possible. This is further supported by Allison and Zelikow (1999) who explain that when faced with a decision, individuals consider their goals and objectives, deliberate all the possible alternatives, weigh the consequences of each alternative, and make a decision by choosing the alternative that generates the highest payoff. Organizational policies and procedures are designed based on the assumption that when faced with a decision, if individuals have the capacity to know all the options and weigh them accordingly, rationality will prevail.

Agentive factors have implications for rotational development programs as program participants are required to acculturate into different host cultures. Poor treatment of participants by host employees can be attributed to the ability of individuals to externalize responsibility for their conduct. As illustrated by Milgram's (1975) classic studies on obedience to authority, it was found that "ordinary people, simply doing their jobs, and without any particular hostility on their part, can become agents in a terrible destructive process" (p.6). Subjects in Milgram's research adjusted their thinking in a way that prevented them from seeing themselves as responsible for their own actions. Milgram has shown the usefulness of using agency to understand how individuals can undermine employee development efforts.

As practitioners consider where or how to invest their development resources, employee attributes are sometimes factored into allocation decisions. One organizational development trend suggests that promotability can be based upon someone's learning agility (Lombardo & Eichinger, 2000; Peterson, 2000). Karaevli and Hall (2003) assert that "by focusing on learning capability, as opposed to more specific competencies, firms increase their chances of growing future leaders who can think for themselves and grow on their own" (p.71). Research conducted by Lombardo and Eichinger suggest there are four types of learning agility: (1) people agility: knowing yourself well, learning from experience, treating others constructively and responding to change pressures with calm and resilience, (2) results agility: getting results under tough conditions, inspiring people to perform above expectations, and building confidence in others through presence, (3) mental agility: thinking through problems from a fresh point of view and being

comfortable with complexity and ambiguity, and (4) change agility: possessing curiosity and enthusiasm for ideas and experimentation, and engaging in skill-building activities.

Assessing whether an employee should be labeled as a high potential is possibly the predominant basis for allocation of development resources (Barrett & Beeson, 2002; Barrington, 2002; Byham et al., 2002; Charan, 2005; Cope, 1998; Garman & Tyler, 2004; Hewitt 2005; Hirsh, 2000; Lombardo & Eichinger, 2000; Moore, 2004; Morton, 2004; Peterson, 2000; Taylor & McGraw, 2004; Vloeberghs et al., 2005). However, there is a lack of consistency from organization to organization in terms of what classifies someone as a high potential. Definitions can vary in specificity from “anybody they think can become a director or vice president in 3 years” (Karaevli & Hall, 2003, p.68) or “the individuals most facile in dealing with change in an organization and who can learn to behave in new ways” (Walker & LaRocco, 2002, p.13), to the more general description of “those people who at various points in their careers are perceived to be potential successors to those at higher organization levels” (Berke, 2005, p.28).

Domains of structure, culture, and agency are helpful theoretical constructs in exposing the meaning of events. Viewed together and analyzed in interaction, they allow a micro-view of individuals to be taken, while still considering cultural and business issues. Such an analysis has been absent from the literature, to date, yet is important in understanding organizational development initiatives that determine employee careers (Pfeffer, 2001). Although structure, culture, and agency have been used to explain phenomena such as student achievement (Datnow, Hubbard & Mehan, 2002; Hubbard, 1995) and government action (Allison & Zelikow, 1999), this framework has not been used to investigate professional development.

Conclusion

The need for management bench strength has been established, yet systems in most companies that support this process are insufficient (Corporate Leadership Council, 2004). Although internal employee development methods are frequently used, the continuation of vague efforts to improve bench depth generates activity instead of tangible results (Kesler, 2002). Thus, there is a need to bridge the divide between the theoretical and practical aspects of internal employee development.

The literature has revealed job rotation programs to be a form of internal employee development. Although the organizational perspective on job rotation is global in reporting methods of practices, these reports do provide evidence of use. From the participant perspective, however, the research is outdated or hypothetical, which also warrants further investigation. Using a structure, culture, and agency theoretical frame, this research focuses on job rotation within an organization and analyzes the current organizational conditions, culture and actions that have organized a program designed to develop bank managers.

CHAPTER III

Methodology

Job rotation programs have proven to be a viable way to add value to employee development programs, thus helping to build company bench strength. However, there are many things we do not know about job rotation programs, such as how participants assimilate into and become successful in a program, as well as which aspects of the program best assist the participants in job preparation. Given the dearth of professional literature in this area, the research questions that guided the study were: (1) What do employees say their experiences are in participating in a job rotation program, (2) what factors do employees perceive as facilitating or constraining their ability to assimilate into, and be successful, within their program, and (3) what factors from the program experience are perceived as having contributed most to the participant succeeding in the job for which they were being prepared; what factors were missing from the experience that would have been more supportive. This purpose of this chapter is to further outline the study with descriptions of sample selection, research procedures, instrumentation, data analysis, limitations to the study, and role of the researcher.

Sample

Description of sample. The sample for this study consisted of employees who graduated from the Professional Rotation Employee Program (PREP)¹ program at The Bank², a national financial services company. The Bank has financial centers, otherwise known as branches, in 15 states across the country and employs approximately 50,000 people.

¹ Name of the program is a pseudonym to protect the agreement of confidentiality.

² Name of the company is a pseudonym to protect the agreement of confidentiality.

PREP is The Bank's internal management training program which utilizes job rotation as a means of developing future company managers through planned experiences. New groups of employees that enter PREP go through the program as a cohort and are referred to as *PREP candidates* (or *candidates*). Management of the program is broken down into 12 groups based on geography. One national PREP manager oversees the coordination of big picture aspects of the program, but each group is managed by a local PREP manager. The length of the program is determined by each group and ranges from 12 to 18 months. The rotations are structured into *phases*, each lasting about one to two months. For each phase, the candidates rotate to a new *host branch* or *host financial center* which are selected by the PREP manager. The progression of the phases is typically: Teller, New Accounts, Consumer Lending, Residential Lending, and Management Internship. In addition to the training in the host branches, participants attend a high volume of training classes on policies, procedures, sales, and management training.

PREP participants are admitted into the program in one of two ways: They can be hired from outside of the company, otherwise known as *externals*, or they can be current The Bank employees (*internals*) who want to get into management quickly. Upon completion of the program, PREP participants are eligible to apply for an open assistant financial center manager position anywhere in the company. The PREP program prepares employees by exposing them to all of the potential areas that they could be responsible for as an assistant manager.

Sample selection. The population from which the sample was drawn was the 300 PREP alumni still employed at The Bank. Participants in my study were obtained from

alumni volunteers. Individuals who became part of the study were delimited to those who graduated from the PREP program, thus excluding any program drop-outs. This ensured that my second research question of determining which aspects of the PREP program best prepared the employees for their job as an assistant manager was relevant. The national PREP program manager sent an email to the alumni, notifying them of the study. A copy of the email can be found in Appendix B. The Bank's legal department prohibited contacting the PREP alumni directly; therefore, the email provided them with my name and contact information, allowing the alumni to voluntarily participate by contacting me. Setting up direct contact with me also allowed the identity of the candidates to remain confidential. The introductory email from the PREP manager explained to the participants that their information was confidential and pseudonyms would be used for both the individual participants as well as the company. The email also included a letter from me as an attachment, further explaining the logistics of participation (found in Appendix C).

The initial sample selection process called for a purposeful sample of 10 to 30 participants to be chosen through a maximum variation strategy. Maximum variation involves selecting cases for the sample that represent the widest range of variation of experiences and/or demographics. This strategy served this research because the PREP population is spread across the United States with individuals representing a tremendous amount of geographic and demographic diversity. Maximum variation allows central themes that cut across this variation to be captured and described (Patton, 2002). The criteria used for constructing maximum variation in the sample were: Age, race, gender,

geographic location, internal or external hire to the program, and date of graduation from the program.

There was an immediate response from 48 alumni wanting to participate in the study. After further discussion about the time commitment, 31 participants agreed to continue which was above the initial sampling goal. After the pool of interested participants was formally established, I sent each person an email (found in Appendix D) explaining the maximum variation approach used in participant selection. They were notified that their demographic information ensured the widest variety of experiences would be captured in the study, thereby enriching the description of the participants' perspective. After reviewing the responses to the demographic data collected, it was determined that the backgrounds of the 31 interested participants would make up an ideal sample (while still recognizing that these were all volunteers) and therefore all would be included. The constitution or characteristics of the final sample are presented in Table 1.

Table 1

Demographic Data of Participants (N=31)

Variable	n
Source of Hire	
Internal	12
External	19
Graduation Year	
1999	1
2000	1
2001	4
2002	4
2003	10
2004	4
2005	4
2006	3
Race	
White	25
Non-white	6
Geographic Location	
Western U.S.	24
Eastern/Southeastern U.S.	7
Age	
22-29	14
30-39	13
40-49	2
50-56	2
Gender	
Male	17
Female	14

Data Collection Procedures

Theoretical perspective. Grounded theory guided the data collection, analysis, and final product of this study. This method of qualitative inquiry was chosen due to the insufficiency of current theory on job rotation programs from the perspective of the participants. In the absence of an existing theory to impose on the data collection and analysis, the appropriate method of obtaining rich findings was to allow the data to

generate the theory, which is the essence of grounded theory. In other words, grounded theory focuses on generating theory inductively from data. It is theory that emerges from the data instead of theory that is imposed a priori as in the case of formal hypothesis and theory testing (Charmaz, 1983; Glaser and Strauss, 1967; Patton, 2002).

While the purpose of using the grounded theory method is to generate theory, no qualitative research is truly approached as a blank slate (Merriam, 2002). Therefore, the data collection and analysis for this study were informed by previous research on structure, culture, and agency. This framework was chosen because the use of these lenses is instrumental in uncovering distinct perspectives on an experience. The combination of the three unique perspectives allows for the most comprehensive understanding of a situation (Datnow et al., 2002; Hubbard, 1995). Structure is the construction of the organization, both physical and figurative (e.g., policies and procedures) that provide the framework in which cultures develop and individuals act (Gordon, 1996; Sewell, 1992). Culture is the collective beliefs, ideologies and norms of a given group (Schein, 1992). Agency defines the perceptions, experiences, and capacity for action of individuals (Datnow et al.; Hubbard). Despite having independent definitions, these three elements are not as unconnected as they might appear to be. For example, an individual may demonstrate certain behaviors (agency), but these actions are both constructed by, and a product of, the culture in which they act. Agentive behavior is further influenced by structure through the explicit regulation of the things that an individual can and cannot do. Research suggests that in order to understand a phenomenon or an event, it is helpful to look at the ways that structure, culture, and agency act and interact (Datnow et al.; Hubbard). This framework has provided a

heuristic for understanding the experiences of the PREP candidates interviewed for my study.

Interviews. Interviewing was the primary data collection method. The interviews were audio taped with the permission of the participant and typically lasted between 45 and 90 minutes. All participants were interviewed over the telephone for consistency and due to geographical constraints. The telephone interviews were audio taped, while I took additional notes. After each interview, I recorded in a book the most salient points each respondent mentioned in order to capture the unique perspective each brought to the study. I also wrote memos in this book about themes that seemed to be emerging as well as specific questions to follow up on with the participants during the second interview.

After the initial interviews were conducted, transcribed and analyzed, I conducted a second round of interviews. During these interviews, I intentionally gave the participants an opportunity to clarify or expand on responses from the first round of interviews. I then further analyzed this data, reassessing existing themes to ensure that they continued to capture the sentiments of the respondents. I developed additional themes as they emerged from the data. The follow-up interviews generally took about 20 to 30 minutes. Member checking, as suggested by Glesne (1999), was done for both rounds of interviews by way of sharing interview transcripts with the participants to ensure that the accuracy of their ideas was correctly represented. Several of the respondents commented on their awkward use of grammar. I reassured them that it was a common phenomenon and typically strange for everyone, including myself, to see our spoken words recorded in written form. They did not, however, find fault with the content of their responses.

Interview Guide. An interview guide was used with questions constructed to gain insight about the factors that facilitated or constrained the job rotation program experience, and the factors that most significantly prepared participants for the assistant manager position. The interview guide is available in Appendix E. A conversational approach was used during the interviews in order to allow concepts and themes to emerge freely. The same questions were asked of each participant; however, probing questions varied from interview to interview for clarification. Protocols for the second interview were constructed from the data generated from analysis of the first set of interviews. Participant demographics were not a part of either interview as this information had already been collected during the sample selection process.

Decision rules. In order to ensure the voluntary nature of this study, two decision rules were used in anticipation of situations that were likely to occur during the course of the research. The first rule was if a participant decided to fully withdraw from the study, for any reason, none of the data collected would be used. The second rule set the parameter that if a participant participated in the first interview, but was too busy for the follow-up interview, it would not be considered a withdrawal from the study and the data collected in the first interview would still be incorporated into the research as happened with two participants.

Data Analysis

The constant comparative method of analysis, as outlined by Glaser and Strauss (1967), was used to ensure that explicit coding and analytic procedures were utilized in this study. When coding interview items for emerging themes and categories, individual incidents were compared with previous incidents in the same category, allowing the

theoretical properties of the category to be generated. The initial coding categories were based on the interview questions. After three or four rounds of coding for each category, I recorded memos of my thoughts to analyze and push my thinking about the data.

The different categories and their properties were then integrated, which began the process of theory development. At this point, the theory and categories were delimited in two ways: (1) Theory was delimited by continuing the constant comparison process which reduced the amount of terminology and generalizations, and (2) the categories were delimited when they reached theoretical saturation; only the incidents that added new points were coded, reducing an unnecessary volume of coded data. Finally, theories based on the major themes that emerged during the analysis were written and organized by themes of structure, culture, and agency. These categories were further broken down to show the complexities of the interactions between structure, culture, and agency.

Limitations

While this research will add to the literature on job rotation programs, there were limitations to the study. The first limitation had to do with restrictions from the legal department of The Bank in that the study be conducted solely through interviews. As such, I did not have the opportunity to observe participants and/or analyze relevant documents. The second limitation comes from having delimited the sample to those who had dropped out of the PREP program. Inclusion of these candidates would have added important insights to the understanding of the factors that prevented assimilation and success in the program.

The third limitation is that direct access to the contact information for the PREP population was not permitted. This restricted my ability to follow-up on the introductory email sent out to the prospective participants and had the potential of limiting maximum participation. However, this did not prove to be the case as ten percent of the population agreed to participate. Fourth, my inability to contact the initial sample of respondents also had an effect on the maximum variation strategy as the true maximum variation was the pool of volunteers, not the entire population. This raised the fifth limitation which isolates the issue of participants self-selecting into the study, resulting in a non-random sample of individuals and creating a convenience sample as well as a lack of diversity. However, Patton (2002) argues that the selection of information-rich cases underlies all purposeful sampling strategies, which include both maximum variation and convenience sampling.

To further address this final limitation of self-selection, two interview questions were asked at the end of the interviews: (1) Why did you decide to participate in this study, and (2) why do you think other PREP alumni chose not to participate. The purpose of these questions was to examine general speculation that participants who self-select into studies do so because they had either a strong positive or strong negative experience, and those who felt neutral about their experience are not motivated enough about it to speak up. However, responses suggest the theory of motivation by highly positive or negative experiences was not entirely true in this sample. The reasons given for participating were delineated into three major themes: Loved the program, altruism, the chance to talk about their experience. Some respondents cited one of these reasons as a motive and some attributed their participation to more than one category.

The first theme was a love of PREP. These respondents were big supporters of PREP because they were grateful for the opportunities it afforded them:

It's a lot of money when you think about just the training – the hours, the mileage, the expenses, the whole thing. It's a pretty bold statement that any company would make. I owe them at least that to stand up and say it's a good program.

Several participants indicated that they loved the program so much that they were “willing to talk about the good and bad of it,” thereby debunking opinions that a positive perspective on an experience hampers constructive feedback from being offered. Study findings supported this statement as participants offered up critical opinions about the program, both positive and negative.

Altruism was the second theme. Many respondents said they signed up because they knew that in order to make this research of substance, people would need to volunteer and so they did. The respondents also wanted their feedback to improve the program that was endeared to them. Their wish was that PREP “stays around” so that other people have the same chance to go through as they did.

A third theme seemed to be participation for the opportunity to discuss their experience: “This was my chance to talk about it again and I needed that.” And, the interview format alleviated fear of ramifications of company politics for the respondents, making it possible for PREP alumni to feel comfortable and willing to participate. Even candidates who had negative experiences participated: “It's nice to be able to tell the story....I felt like I had one of the most frustrating times.”

The respondents also spoke to why someone would choose not to participate and offered up three general hypotheses: No time or burned out, had either a neutral or a negative experience, and personal reasons. The dominating thought was that as branch managers, the PREP alumni are simply overstretched in their jobs and/or burned out, which left them with no time to contribute, given the length of the required interviews. Further, they may have thought “I don’t have time and everyone else probably signed up.” According to my respondents, given busy schedules it is not uncommon for someone to just delete an email that comes from someone they don’t know; or that they procrastinate until the email gets buried and forgotten about.

Some alumni may not have participated, not because of reasons to do with PREP, but because of current feelings about the company. It was noted that The Bank is undergoing changes that have some employees uncertain about the bank’s direction and possibly disgruntled. There were several comments like: “If you had asked for participation even just a year or two ago, the response level would have been higher.”

Another reason given for non-participation was connected to people’s attitudes toward research. On the one hand, a third party confidante served as a motivation to speak, but it also prompted hesitation about giving information to an unknown person: “I had a little hesitation at first because I thought, ‘Who is this girl? It seems like it’s endorsed and is okay, but is it okay?’” Aversion to research was also suggested as: “Maybe they don’t know someone who has gone and done research projects. Maybe they are intimidated about answering questions.”

Inclusion of these interview questions allowed some light to be shed on the issue of self-selection into this study. While precise conclusions cannot be drawn about the

participation/non-participation debate, it does confirm respondents across the spectrum of experiences – positive, neutral and negative – reached out to participate.

Role of the Researcher

The purpose of this section is to address the notion of trustworthiness, or validity, of my study by presenting my personal beliefs and experiences in relation to the research. The process of reflexivity, or reflecting on the researchers' own perspective (Patton, 2002), is essential for building confidence in the methodology and findings. While one strength of qualitative research is the ability to approach a setting without a predetermined hypothesis, the challenge is approaching with an open mind. Therefore, the perspective of the researcher must be made explicit (Patton). However, the goal is not to eliminate researcher biases, but to identify and monitor ways in which they may shape data collection and interpretation (Merriam, 2002).

I was an employee of The Bank for three years in the training department. This is where I was first introduced to the PREP program and how it functioned. I did not work directly with the PREP candidates, but as a trainer, candidates often attended my classes. It has been several years since my affiliation with The Bank.

The reason I chose this site is because of my keen, ongoing interest in the field of management development. I am especially interested, as demonstrated by my choice of dissertation research, in how companies develop managers in an accelerated fashion to support company growth and strategic goals. Partnering with The Bank allowed me a unique opportunity to access a long-established program in which there was also ample program alumni to work with.

My relationship with The Bank and the PREP program candidates informed the research process. Having information helped me to anticipate interview questions that would be pertinent to the unique framework of the development process. I went into the interviews with a familiarity of the rotational method, making it easy for me to understand terminology used by the respondents. It also shaped the way I formed probing and follow-up questions as my working knowledge of the program gave me insight as to salient topics the respondents may have wanted to elaborate on as having impacted their experiences. While eliminating all bias is impossible (Fetterman, 1998), through reflexivity and full disclosure of my positionality, my intent has been to make all steps of my research as transparent as possible in hopes of creating confidence in my work.

CHAPTER IV

Findings

The purpose of this chapter is to present the findings of this study, which used qualitative methods to understand the employee perspective of participation in an accelerated management development, job rotation program. The results are organized by the perspectives of: Structural factors, cultural factors, agentive factors, and how the factors interacted to shape the development of the candidates.

Structural Factors

The formal structures of the PREP program created by The Bank played a significant role in the development outcomes of the participants. There were structures that were deliberately created as part of the program design; for example the length of program and required training classes. Presented are also the structures within The Bank that, while independent of the PREP program, inadvertently had an impact on the development of the participants.

Orientation

After being admitted into the PREP program, the orientation is the first structure the PREP candidates encountered. It was typically a one- or two-day event facilitated by the PREP manager that served four main purposes: Set expectations about what the candidates would be doing during the program, equip the candidates with the necessary resources, connect the candidates together as a cohort, and motivate the members. While there was variance in the way the orientations were run from group to group, there were many similarities in practice that the PREP candidates cited as beneficial.

The timing of the orientation was cited as very important. PREP candidates noted how helpful the orientation was if it was held the first day on the job. If the PREP candidate worked for a few days in a financial center prior to the orientation, the work experience was viewed as having “made their head swirl” and resulted in a feeling of disorientation from walking into a new place not knowing where anything is. Orientation topics included general corporate new employee issues such as HR paperwork, reporting time, company history, and organizational structure. Expectations and goals were laid out for the individuals as well as what the chain of command was in terms of procedures for getting problems solved. PREP candidates received a PREP binder that outlined the structure of the program in terms of the different phases, checklists for what was to be accomplished during the phases, training classes and general resources. This was commonly referred to as the “PREP bible.” A typical comment was that having these resources made it “nice to not have to think about what I am going to be doing in this, when I am going over there.”

One motivational technique used by PREP was to bring in guest speakers. It was encouraging for the candidates to hear from branch managers and regional bank managers who were PREP alumni because it gave the new class a chance to see where they could go in the company. Other PREP alumni and members of the current PREP class were often there as well to share their own experiences in the program and subsequent career path. One participant recalled a specific speaker very clearly:

During orientation, there was a PREP graduate that came by and was telling his experience. My first thought is oh my God, I’m not going to be able to do this. He’s been on a roller coaster ride up and down, up and

down, one branch to another. The last thing he said was 'You guys, I'm an average guy, I got through it, it was great, and you guys can do it too.'

Sharing this anecdote helped alleviate some of the anxiety new PREP candidates were feeling about embarking on such an intensive journey.

The PREP managers arranged for the participants to interact with the invited speakers, which was a highlight. For example, luncheons with the regional managers and social hours at night with branch managers and regional staff were organized. One PREP manager went as far as having the branch managers, from the first financial center to which the candidate would be going, attend the activities so that the introduction could be made prior to their first day in the branch. Having these extra activities built into the orientation helped the candidates assimilate into the program more quickly by building the foundation of a professional network.

The structure of the orientation immediately set up conditions for a bond to be formed among the PREP class. Icebreakers and teambuilding activities facilitated the relationships among the group. Just being able to meet the entire PREP class during the orientation was noted by participants as comforting and fun. Contact information was exchanged so that members of the group could begin to rely on each other right away. This arrangement also allowed PREP candidates to receive advice from PREP managers, which made lasting impressions on them and influenced the way they would handle various experiences encountered during the program. One area of guidance, as recalled by several respondents, was how to approach the financial centers when rotating through the phases. It was explained that while the branches were part of the same company and the signage and goals may be identical, each branch was run individually by the manager.

The recommendation was to be extremely observant, keep your eyes open and mouth shut, learn as much as possible from each of the managers, and never undermine the branch manager. Additional advice was to pay close attention to how the branch was run in terms of politics, dynamics between the customers and staff, and between staff members. Having guidance on how to navigate and survive the unwritten laws of the financial centers helped the participants avoid problems later on as they endeavored to blend into the cultures of the different branches.

A further impression that was made on some of the candidates was when some PREP managers brought up the significance of the investment that was being made by the company into each PREP candidate. The incoming class was told that each individual selected for the program was viewed as having potential but what they decided to do with their talent while they were in the program was up to them. One participant said that having it framed in this perspective put the right attitude in his mind about what a privilege it was to go through the program, ultimately allowing him to see the big picture when transitioning from branch to branch got tough. It was both humbling and inspiring for the PREP candidate to know that such a large investment was being made in him or her.

A weakness of the orientation for the internals was that the structure was set up for external candidates, as much of the information covered during the orientation was redundant for the internals. PREP managers acknowledged this issue, and in some cases the internals were excused early from the orientation to keep their time from being wasted. However, this modification to the structure slightly fractured the bond that was forming in the group, at least in the beginning. Despite this minor problem, the overall

experience was still viewed by candidates as positive. Almost all of the participants described the orientation as upbeat, well planned and that it fully prepared them to start in their first branch knowing what was going on. Participants commented that they received more than they had expected in terms of information and resources. The overall structure of the orientation made a significant difference in how the candidates approached the program and clarified from the start their understanding as to what their role was.

General Program Structure

Rotation schedule. The participants had specific thoughts about how the multi-phase, rotational set-up helped and hindered their experiences. The predominant opinion given about the program was that it was very well structured and beneficial to have the candidates go through the phases at the same time as a cohort. The phases started with the teller function for about eight weeks, and progressed to new accounts for approximately eight weeks, consumer lending for eight to twelve weeks, residential lending for eight to twelve weeks, and the management internship phase for about eight weeks. The management internship phase is the time when candidates learned the particulars of the assistant manager job. Each phase built upon the previous and the order was thought to be logical and effective. The rotations allowed the candidates to get at least five snapshots of how to run a financial center and how five different teams operated. Even the poor examples of management were identified as good learning experiences because it gave the candidates examples of what they wouldn't want to do when it came time to take on their own branches. Internal candidates hired into the PREP program who knew how to be a teller and new accounts representative said they thought the teller and new accounts phases would be a waste of time, but the chance to go through and spend time observing

the management style of those financial centers turned out to be worth repeating the training in these areas.

Moving around to various financial centers also allowed the participants to build a large network of bank employees who later became a resource because they could call on them with questions and for support. Rotating also provided the candidates with a wide perspective of The Bank because they were not just locked into one branch as some people are for their entire banking career. Looking back and comparing the process of going into management through the PREP program versus the traditional way of moving up in the bank, one participant felt:

I could have done it that way but I think in the long run for me it [PREP] was the better way. It might have been more stressful that [the traditional] way. This gave you time to grow and not be thrown into everything all at once.

Length. On average, most participants felt that 12 months was an appropriate length for the program. Some felt it could be even shorter because by the 12 month mark they started to lose motivation. The pay was also considered low so it was difficult for some to make ends meet while training. Any longer than a year risked a financial hardship situation, and some even took a second job during the program. Certain participants advocated for a longer program up to 18 to 24 months. They felt they needed more time to learn everything they needed to learn because about 50% of their time was spent in the classroom and they needed time to apply what they were learning back in the financial center. A good example is when one respondent discussed the lending phase of her training. When it can take five weeks to see a loan through from start to finish, she

felt she did not have enough time in the field to graduate and do lending as an assistant manager.

Some candidates also felt that adding additional time to the program cuts down on the “sense of entitlement” new PREP candidates may have about feeling they don’t need management training and that the PREP program is a brief, unnecessary stepping stone for them. The candidates who thought some of their peers needed this time to adopt some humility felt: “I think if you shorten down the amount of time someone has to invest into it, you may also shorten down the investment.”

Transitory Nature. Inherent in the rotation structure of the PREP program is job transition. Everyone reacted to this format differently based on agentive or individual dispositions. However, there were structures put in place that eased the stress of the constant movement for most participants. The first structure that seemed to help participants was during the initial program interview and onboarding process when the PREP manager articulated the expectation that moving around and traveling was a mandatory component of the program. This allowed the participants to mentally prepare for the frequent environment changes they would be making, and eliminated the element of surprise as to how much they would actually be traveling. Second, when The Bank’s communication structure between the PREP manager and the host manager was in place and the host manager was appropriately informed about the arrival of the new PREP candidate, a smoother transition took place for the candidates. Participants recollected that communication transpired in one of two ways: The memo the host manager received was very thorough and detailed their arrival and responsibilities of both the host manager and the candidate, or the communication was more flippant in nature and not helpful

because the host manager “just got a letter introducing the candidate.” The degree to which the host manager understood their role in the process and the degree to which the PREP manager was aware of what the host manager was doing significantly shaped the learning outcomes of the candidates.

Overall, regardless of how easy the program structure made it for people to continuously rotate, the act of making the transitions was a double-edged sword. There was always an underlying level of discomfort because the candidates were moved every two to three months, which is precisely the time that it took them to get settled into the learning and culture of the financial center they were in. A typical comment was: “In each stage right about the end you felt comfortable with the products and what you were doing – and then you left.” Because of the constant rotation, the professional network that the candidates built through the program was unrivaled but it came with a price. One participant recalls what the experience was like for him and its consequences:

It’s a brand new job you’ve got to start all over again. I’d tell my wife,
 “Here we go again.” I’m stressed out, meeting new people. Smile, shake
 hands, do the right thing; every three months it would come up. I
 appreciate it now. I know a lot of people now.

Host Financial Center Selection Procedures

The procedures for selecting the host branch varied by group; however, certain practices were cited as creating either a favorable or unfavorable experience for the PREP candidates. The process of placing each candidate in a favorable learning environment was feasible on the surface. A favorable learning environment was first, a branch that actually specialized in or sold the product (i.e., consumer or residential loan) the PREP

candidate was there to learn about. For example, one PREP candidate learned the new accounts function in a branch because she was placed in a branch where she was able to open at least three new accounts per day. High transaction volume was cited as a conducive environment for learning how to teller; although it could swing the other way if the volume was so high that there was no time for the candidate to ask questions or receive thorough explanations. Frequently mentioned was the need to be in a branch that did high amounts of loans in order to grasp the complexities and details of the process. Second, being placed in a financial center that had a management staff that was receptive to the PREP program provided a favorable experience. It turns out that a manager having past experience with a PREP candidate in their branch was not as important as the manager being receptive to the program. Third, being placed in a host financial center that was adequately staffed enabled the PREP candidate to have people around them to learn from.

It was stated repeatedly that one of the biggest influences as to whether a candidate ended up in a favorable host branch was the involvement of the regional bank manager in the process. The regional managers oversee all of the branch managers in a region and therefore have the most knowledge about which branches are the best at different functions (i.e., high volume of consumer loans, large number of teller transactions) and which are the ideal places to send a PREP candidate to learn.

Two specialized host branch situations surfaced as having been conducive to later success as a branch manager. The first situation that provided a distinct opportunity occurred when a candidate was placed in a host branch that was in a building connected to a regional office or other business unit. The proximity of working next to the regional

staff afforded the PREP candidate the opportunity to increase their visibility with bank executives for future hiring purposes as well as to create a superior network of contacts and resources. The second situation occurred when a candidate was sent to a host branch to learn from what one participant called “the best of the best.” Beyond just being sent to a financial center that was receptive and prepared for the candidate, the candidate was able to sit with the top consumer lender in the state or the highest producing new accounts representative in the region. This experience drove the learning to an entirely different level. Participants who were able to work with an exemplar employee credited this situation to their success in later becoming a top financial center manager and achieving awards for branch performance.

In contrast, some host branch selection practices did not support the program or participant’s goals. Too often, the PREP candidates were placed in branches that were understaffed to help alleviate the branch work load. The candidate was sent to a location under the guise of learning a particular phase, but in reality the candidate was sent to work as a type of temporary employee. In one extreme case, an email was sent out in a free-for-all fashion to the branch managers in a region asking who wanted a PREP candidate for their new accounts phase. The manager who replied back, and ended up getting this particular candidate, did so because she needed a new accounts representative as her current employee was leaving the company. The PREP candidate received two days of training from the outgoing employee and was then left in the branch as the sole new accounts representative without anybody to learn from. Ultimately, the branch manager became disgruntled with the PREP candidate for not doing a sufficient job, without considering his lack of training – training that she was supposed to be providing

him. While the branch manager, as an agent, played a part in the outcome in this example, it also illustrates ways in which the candidates are disadvantaged by selection processes that are not structured by more stringent controls.

There were also frequent reports of a host branch being selected for a PREP candidate but the branch not selling the product the candidate was there to learn. For example, one participant was sent to be trained in mortgage loans in a financial center that was located in the downtown area of a large city that was surrounded by commercial property. There were no homes in the immediate area and the financial center did not have any residential loans in the pipeline. The lending officer was very nice and tried her best to teach the candidate by offering up her old files to look through. However, based on the host branch selection processes, the time spent in this phase was fruitless for both the candidate and the company that was investing in the candidate's learning of mortgage lending.

Participants had several thoughts on how to improve the practice of selecting the host branch. The first was to better define the roles and responsibilities and increase the accountability of the host manager. One way to facilitate this is to increase the communication between the PREP manager and the host manager. A face to face meeting with the two managers and candidate was suggested, or at the very least, a conference call needed to occur prior to the candidate's arrival in the branch. According to one participant, it really helps when the host manager is on board with the thought that "I was put there because you are good at something, so make me good at it." Essentially, the PREP candidate walks away as a representation of what was learned from the host manager, and ideally, this representation is a successful one.

A second suggestion to improve selection practices was to ensure that certain financial centers not be allowed to have a PREP candidate for such reasons: High turnover, significant personnel issues, the manager is not receptive to the program, or the financial center does not have enough business in the area the candidate needs to learn about. It was recommended that having the PREP candidate evaluate the branch after the phase ended could help discern these issues and assist with future placement decisions.

Third, there are changes the participants would like to see during the actual branch stay that would improve the structural aspects of a host financial center. Some of the suggestions included having a specific mentor assigned to them, eliminating the concern someone would pay enough attention to them to teach them what they needed to know. Also, several participants felt their learning would have been improved if the host manager had given them a performance review, just as they do for their own employees. This practice differs from a more common practice of just having the host manager fill out a quick sheet to turn in to the PREP manager who then delivers the feedback. Not knowing how well they are doing or where they need to improve was of great concern to the candidates and having the depth of feedback that a manager would give to her own employee was a frequent request of the participants.

Finally, lack of communication about the assignments did not happen often, but when communication was overlooked it was a huge source of anxiety for the participants. In one case, a candidate was sent to a branch that was “really far away” from where he normally worked and lived. Travel is a standard aspect of the PREP program, but the assignment was so unexpected for this participant he actually thought he was being punished for something. In a second case, a candidate was sent to work in a branch that

was run by a close friend of a manager that the candidate had previously worked for and with whom he had personal difficulties. This participant had the exact same reaction as the previously described candidate: Fear that he was being punished for something. *Unclear communication and ambiguity around placement decisions caused the candidate to wonder about what was going. Such concern disrupts the smooth process of making rotational transitions.*

Ultimately, these examples of host financial center selection practices boil down to one question: What is an ideal learning environment and how do you balance it with short-term and long-term company goals of running a business and creating competent managers? The bottom line is when you have a company with thousands of employees, and from that, hundreds of people out for the day, week or month on vacation, leave, or training, the PREP managers, regional managers, and financial center managers end up having to make difficult decisions about where to place their personnel, which included PREP candidates, in order to keep their customers serviced.

Often, the decision made is in service of the short term goal of keeping the branch staffed by using the extra help of the PREP candidate. However, the number one frustration expressed by the participants was being used on the teller line, instead of learning how to open new accounts or process consumer loans. The frustration was so great that when participants talked about the times they were able to do what they were sent to the branch to learn, they did so in a way that suggested the opportunity to learn their intended task was the exception, not the rule. This is not to say that all participants felt they should learn in a vacuum. Several supported the desire to help out with staffing needs, asserting that ultimately they are employees of The Bank, so if they are needed to

do certain things that take them away from their phase learning, they need to do it, particularly if the branch is short of personnel or there are other temporary problems. In fact, one participant completely dissented from the popular sentiment by saying:

Some say it is a bad thing, but sending you to financial centers that are short staffed is good. It throws you in the trenches and gets you experience to get it done; that's how it is when you have your own financial center.

The argument is that living in chaos and having to do a bit of everything is a reality of the job they are being prepared for. It should be noted that many with this opinion were internal candidates who were already familiar with the workings of the bank prior to starting the PREP program. That is not to discount their assessment of the situation because their concern brings up a significant point that it can be too big a shock for someone to go from a controlled learning environment to the nitty gritty reality of running a branch.

The problem is that in trying to achieve the short term goals of adequate staffing and customer service, the long term objective of creating thoroughly trained managers takes a back seat. Quick staffing fixes undermine the point of having the program in the first place. Unfortunately, another byproduct of this trade-off is a loss of program prestige. It was felt by many that the continued and increased use of PREP candidates as band aids for understaffing in the branches has led to the PREP program acquiring a reputation of not turning out the most qualified managers. This is disheartening to the many participants who have a fierce loyalty to the program and regard PREP as one of the most valuable experiences they have ever gone through.

Management of the PREP Program

The Bank is broken down into groups based on geography, each group having a specific PREP manager. Actions specific to the individual PREP managers played the biggest role in the way the PREP program was managed and will be discussed under agentive factors. However, there were universal structural aspects of the way the PREP program was managed that will be introduced here. For example, having one specific manager of the PREP cohort was significant. While personnel changes to the management of PREP, in the middle of a program, are often a timing issue that can't be helped, management change was still cited as a major detriment to the overall experience. The PREP manager is often the candidate's only source of consistency and one participant expressed the difficulty of having an interim boss: "There wasn't a consistent person to monitor my progress and be my ambassador and know all the things that I've done." Often, a new manager meant having to endure the hardships of a new person who doesn't yet know what they are doing in their job.

A second source of concern that caused a feeling of anomie, or uncertainty of norms and accepted practices came, not from having someone consistently in the management role, but from having more than one person who managed. There were occasions when it was not clear as to who the real authority was over the program: The PREP manager, the PREP manager's manager, or the regional manager. The power conflicts that played out at levels at and above the immediate manager's position sent the candidates conflicting messages about the proper chain of command, which caused tension and confusion for the PREP candidates.

A disconnect between the structure of what the PREP program was teaching the candidates and the reality of branch life posed issues that were problematic for participants. Some of the PREP cohorts were managed through the training departments. Even if the views of the PREP managers were favorable toward the program, the training department was often not considered to be the “real world” by the participants. Some participants commented that they could tell some of their key goals were set by people who weren’t familiar with the branch environment. For example, the number of certain types of accounts they needed to open and certain types of loans they needed to fund were not realistic based on what actually happens in the branches. These impractical expectations turned the good intention of setting goals for the candidates to create accountability into a disconnected learning experience.

Certain participants found the training/branch disconnect to be constructive, as explained by one respondent:

We were given management books to read and a lot of the philosophical things of management were discussed and we zoned in on those; whereas in a branch you don’t have time to do any of that. That disconnect served both for impeding that development and also helping it. You look at it as a science rather than just going to work.

Having the chance to step back from the daily tasks in the financial centers and focus on management theory gave participants an advantage in their path to management. They were given the forum to learn about critical management theory that is not always available in the financial centers and were then able to marry the theory with practice.

The frequency of formal meetings of the PREP group with the PREP manager was determined from group to group, ranging from once a month to once a quarter. Having meetings too often was seen as a burden because so much time was spent in mandatory training classes, such as teller and new accounts training, that the candidates needed as much time as they could in the branch. One favored way was to have meetings that were scheduled according to the time when the candidates rotated to a new phase. Disappointment was expressed when the group met too infrequently, such as twice during the entire program. Usually, the groups would get together for an activity or to learn something. Guest speakers were often part of the instructional day, as well as time allotted for talking to each other and giving advice on issues they were facing in the financial centers. Reflecting back, several participants wished they could have had more time for forums to discuss what was going on in the branch and share best practices. Panel discussions were also suggested; bringing in regional managers, new accounts representatives, assistant managers and the like in order to get real world answers and learn from different people.

As much as they clearly valued their independence, participants couldn't emphasize enough how much they wanted specific expectations from their PREP manager, as well as consistent feedback on how they were doing in the program in order to minimize their frustration. Some PREP managers structured their feedback well in that they consistently communicated information to the participants about their performance. The candidates in the groups that did not receive adequate feedback felt the absence. Having a review only once a quarter without regular communication about their performance was frustrating. It made the participants extremely nervous having no idea

where they stood and going through entire phases not knowing if they were doing a good job. Another participant recalled not getting a review until the end of the program and said, “By that point, what does it matter?”

Feedback from the respondents highlighted certain unique assignments that were structured into the program that facilitated their development. One PREP manager required the group to fill out work journals and turn them in which allowed the manager to keep consistent track of how the PREP group was doing in the field. Another manager had the group turn in a situational analysis. For this, the candidates wrote about a situation they witnessed in the branch, such as when a manager handled a difficult customer issue. The write-up described what happened, how it was handled and whether the candidate agreed or disagreed with the actions taken by the person they observed. A third manager gave her group a two-page scenario of an actual financial center. It was a nightmare branch which caused the candidates to hope they would never get sent there upon graduation. Their assignment was to create a plan as to what they would do as the manager taking over this branch and present their recommendations at a next PREP cohort meeting. It was recommended by the participants who did this that more scenarios be developed to help them develop critical thinking skills for each of the phases. However, it was cautioned that if additional assignments are structured into the program, they need to be used and/or followed up on. Some participants complained that some of the reporting they were required to do was a nuisance because they turned assignments in and nothing was ever done with their work.

Classroom Training

The overwhelming view on the formal, classroom training during the PREP program was positive. The trainers were seen as both competent and a source of support for the candidates. The classes generally fell into four categories: Technical, lending, sales, and leadership training. The technical, lending, and sales classes were by and large excellent. However, reactions to classroom leadership training were mixed. Some participants felt the leadership training in their geographic area was strong and was able to be translated and used in their daily work. Others felt that the leadership training was not real world enough and did not teach the nuts and bolts of areas such as leading a staff and taking disciplinary action with employees. They felt they had to relearn these concepts again once they were in the financial center or had to figure it out themselves. There were two reasons for the variation in leadership training: (1) Each geographic group had its own set of trainers, and (2) the course curricula changed over the years. Given the array in people instructing the classes and range in the years the candidates went through the program, the quality of leadership training was mixed.

Another structural arrangement that impacted the candidates' learning process was the timing of classes. For example, in order to do lending in the branch, formal lending training had to be completed. Tests had to be passed so that The Bank could issue the employee access to the lending systems. However, sometimes a candidate was supposed to be learning lending at a branch but they did not have access to the systems because the course schedules did not match up to the timing of the phase of their rotation. Some participants were unable to do anything about it and just had to wait it out during

the phase and learn about lending later. Others were fortunate to have the problem solved for them by being flown to another city to attend a lending class outside of their group.

The amount of required training classes was cited as an asset as well as a liability because, while they were important, going to class pulled the candidate out of the host branch where they felt the most valuable learning was taking place. Some participants recommended keeping the high volume of training while others simply summed up the feeling of having too many classes: “we were always in class” or were “taking tests on things that never happened.” The feeling was that a way to maximize the necessary learning would be to cut down the number of fluff classes or non-critical training that could be taken after the PREP program. From a scheduling perspective, some participants felt like the classes were too crammed together. But for others, having the classes bunched together was structured well for them because it cut down on travel if they were located far away from the training sites.

Financial Center Training

Training that took place in the host financial centers was particularly valuable to the participants and recommendations were made to increase the focus on the training in the branch to ensure the greatest amount of real world learning experiences. Many of the prevailing factors impacting the learning in the financial centers were also structural. The physical location of where the candidate worked played a role. The simple act of being able to sit next to the person they were supposed to be learning from was critical and surprisingly was not accessible a good portion of the time. The candidate is an extra person in the branch, which often meant there was no specific desk for them during that learning phase. Sometimes the candidate would end up doing consumer lending in a back

room or rotating desks based on who was out for the day. Being on the teller line and being able to turn to someone on your left or your right and ask a question was considered reassuring as opposed to “sitting in a dark corner by yourself.” The situation was dependent primarily on staffing issues and the host branch selection criteria for sending the candidates to adequately staffed branches.

Bank policies had a structural influence on the program. For example, employee salaries are based on a profit model that has incentives for selling certain products that support the direction and financial health of the bank as a whole. These incentives inadvertently dictated what the candidates learned during their phases. A candidate may have gone to a branch for their residential lending phase and not learned about residential loans because the bank incentive model was paying out higher amounts for sales of consumer loans, which naturally is what everyone was focused on in the branch. Sometimes the lack of focus on residential loans was beyond the control of the financial centers, such as when external rate environments determined whether the products the customers would be interested in were conducive to mortgage lending. However, in these situations the PREP candidate was often still expected to be further along in residential lending despite the lack of available training on the products.

A second influential policy impacting the development of the candidates determined which employee got credit for the customer accounts opened by the PREP candidate. Some groups had the candidate put the employee number of the host branch's new accounts representative on the application, which gave the new accounts representative the credit. Other groups had the PREP candidate put their own employee number on the application for tracking purposes. The commission-based structure of the

new accounts representatives' salaries fostered a wary attitude toward the PREP candidates as they were perceived by the representatives as either directly taking away business from them in the host branch or as taking the representative away from focusing on their business when they had to spend time training the candidates.

One final structural issue that impacted the participants was that PREP candidates are hourly employees, but the function they were learning, management, is a nonexempt position. This means that managers are considered a professional under the law and get paid for the job, exempting them from overtime. As nonexempt employees, branch managers often stay late and finish their own work after hours. Because of scheduling and overtime conflicts, PREP candidates were not always able to stay with the manager which sometimes hindered them from learning the realities of the management function.

Alternative Learning Experiences

According to the participants, some of their best learning experiences took place outside the formal classroom and financial center learning environments. Many people were able to take part in extra activities that they credit as being influential on their development. The most frequently cited event was the annual, national PREP meeting which was organized by the bank for the benefit of the candidates. At this meeting, PREP candidates from all over the country got together. What stood out as important was the chance for them to meet top executives and tour the company's headquarters, including the CEO's office. This made the candidates feel "like they were someone" and that they were important to the company. This meeting also afforded them the inside scoop as to what was going on with The Bank, giving them a wider view of the company. At times due to funding, the meeting did not take place. This is an example of how expenditures

on the program impacted the overall experience as PREP candidates who did not have a meeting during their program report being disappointed that they were not able to take part in such an influential event and believe the money would have been well spent to have it. Some training groups that managed the program on a local level dealt with the structural issue of the national meeting cancellation by having the candidates attend their own staff retreat. This was considered by the participants to be a fun and worthwhile experience, as they knew all of the trainers so well from being in class with them most of the time. While there is no way to truly substitute for the experience of the national PREP meeting, the retreats did provide something the candidates needed, which was the opportunity to relax and connect on a personal level with others outside of the program.

Other meetings and events within The Bank had a positive impact on the candidates' experience. Some participants attended the monthly manager, assistant manager or cluster meetings for the region they were working in. This helped the candidates better understand what was going on in the region. It also prepared them for their forthcoming graduation by exposing them to the current financial center managers and indoctrinating them into the management culture. A few candidates made presentations on various subjects about banking at a variety of meetings. This turned out to be an empowering experience whether they were leading a section of a branch staff meeting or presenting to an audience of hundreds of new accounts representatives.

Some participants went through the PREP program at a time that coincided with a merger or acquisition the bank was going through. Therefore, candidates were often sent on temporary assignments to assist with the conversion of an outside financial institution with The Bank. The chance to work in a drastically different market than their own

created a huge learning opportunity for the participants. Sometimes, the changes going on at the bank were close to home and even the chance to help out with the relocation or grand opening of an existing The Bank branch was valuable. Most PREP managers and host managers were open to giving the candidate time to attend special functions, but sometimes finding out about them was difficult. Certain regions were good about putting the PREP classes on the email distribution lists for announcements that went out to the managers in the region, but some PREP cohorts were left off of the communication.

Extra learning opportunities allowed candidates to broaden their knowledge about the departments outside the financial center. Per the program structure of the different groups, certain PREP classes had additional phases added into the framework of the program. One or more groups had participants spend time working with the recruiters. It was helpful for the candidates to learn what it takes to get hired into the company as well as it introduced them to the recruiters who are a valuable resource to branch managers. Some cohorts sat with Help Desk employees in the call center which helped them understand the back office side of the company, specifically what and who were providing support for the financial center employees and external customers. These additional learning opportunities made such a difference to the candidates' development that they suggested formally building them into the program to expose them to the broader picture of the bank. One caution was made with this recommendation: In order to effectively add value to the learning process, the structural experiences need to be grounded in the functions of the intended final role.

Two final structural factors were tangible and cited as giving certain participants an advantage over their peers. The first advantage occurred when candidates were given

access to a history book about The Bank that told the story of significant events over the first hundred years of the company. The candidates who were given, and read this book felt that it gave them extra insight which helped them talk more intelligently with customers and colleagues about the company. The second advantage was the opportunity to cultivate a relationship or have regular contact with their regional manager. The chance to meet with them and learn first hand what they expected from managers in their region clarified for the candidates exactly what was valued and considered to be measures of success in the region. While this relationship largely relied on the actions of the individuals involved, often initiated by the regional managers, thus largely interpreted as an agentive factor, access to the managers relied significantly on the structure that supported and encouraged the relationship. This made a huge difference to those candidates who had this door opened for them.

Placing Out of the Program

At the end of the program, the PREP candidates must interview, just like all other bank employees, at various branches that have an opening for an assistant manager. In discussing the process of placing out of the program, the respondents explained that the experience came down to two aspects: (1) The extent of anxiety for the candidate, and (2) the pros and cons of doing the internship phase at the financial center the candidate ultimately was hired into as an assistant manager.

The structure of exiting out of the program caused anxiety for some candidates because the operational aspect of the process was not communicated effectively enough by the PREP manager. For others, the PREP manager was very clear with them about the process. Yet, even with great communication about how the placing out process would

work, there was still worry by various candidates about what would happen if they did not find a job in their geographic area within three months of graduation. Some people hunted through The Bank's internal job postings every day and others simply "freaked out." One entire cohort was so anxious that they were allowed to interview for assistant manager positions early so everyone knew where they would be going after the program. Another cohort was also allowed to interview early, but a member of this group felt it backfired because they essentially became an employee of the last financial center they were at and technically skipped the internship phase. She didn't realize it would happen at the time, but retrospectively felt the change in structure of the placing out process, which led to her missing the formal internship piece, hindered her development. On the other end of the anxiety spectrum, many felt it was not a big deal and interviewing, and not knowing, was just part of the process.

Several PREP managers made efforts to place candidates in the internship phase in a host branch that either had an opening or was going to be having an opening for an assistant manager. This way, the final two months or so of the program also served as a job interview. For some participants, this was a great way to go about it and ensured that they had a seamless transition into their first assistant manager job at that financial center. Others had more difficulties for a couple of reasons, one being it was tough to get some of the staff in the branch to fully accept the PREP graduate in their new position of authority as assistant manager. Certain staff members who trained the candidate were not able to separate out the experience of teaching a new person and watching this person make mistakes, with the reality that the PREP candidate is now their manager.

Participants who experienced this felt that it would have been easier to become an assistant manager at a branch they didn't have experience with and start fresh.

The second reason it was difficult to intern in the financial center the candidate was to become the assistant manager at came from the host branch staff having too good of a rapport with the PREP candidate during the internship. Instead of treating this person as someone new who needs to learn the functions of being an assistant manager from the ground up, the candidate was used as a go-around person, filling in for different people in the branch. It was assumed that they'd get to the teaching the next day, then the next day, then the next. Pretty soon, the internship was over and the candidate graduated without knowing how to do the assistant manager job. The pros and cons of both approaches to internship placement show there is no foolproof way to set up the final phase to ensure a seamless transition into the candidates' first financial center, even when the structure seems to support an easy transition. The structure is unable to function independently of the individual skill levels of the candidates and the cultural and individual beliefs and attitudes of employees regarding position and authority.

Limits to the Structure

Analysis of the structural aspects of PREP prompts the question: What are the limitations to even the most well thought out and executed development program? Many participants talked about the reality of being developed into a manager during PREP: You just won't learn everything you are going to need to learn to be an assistant manager because the structure of any program can only take you so far until you are actually functioning in your destined role. One participant recalled:

The old PREP people before me said PREP is going to prepare you for about 50 percent of your role. The other 50 percent you're going to have to figure it out when you get in the branch. Thinking about that now, in terms of how you would improve that, I don't know that you could. I think PREP is opening the door for you. PREP is going to give you everything you need to handle that role, but the only other way to learn the other 50 percent is just to be hands on and get in there and do the role. I thought, 'how could they make it so that I could learn 100 percent?' I just don't think it's possible. For anyone that is going into the program and they get out of the program and they think I'm so nervous, that's OK.

A perfect example lies in one of the chief complaints from the participants about how many felt they lacked the necessary training in correcting employee performance issues and had to figure it out on their own when they got into their first assistant manager role. How the structure of a management training program can truly prepare someone to do this is questioned by one respondent:

You can go through all the HR seminars you want, but until you've got the specific situation where you're in charge and one of your reports is not getting the job down, there's no way to teach it that I know of.

The point is that management training classes can provide important fundamentals, but no matter how many scenarios the class is given to practice and role play correcting hypothetical employee issues, it takes being in the job and trial-by-fire to truly acquire the skills. One of the best possible scenarios is when it is structured in the host branch so that the candidate is able to sit in on coaching and performance feedback sessions to see

first hand the reactions and responses that come up, as well as actual words that are appropriate to use in those situations. Although effective, this arrangement still has its limits. One respondent who did have this opportunity was not comfortable with the dynamics because she: “Felt like I was intruding and the situation was personal between the employee and the manager.”

Even if the program can only take an individual to a certain point of development, there are controls within the structure that promote the maximum amount of learning for the candidates. For example, within the structure of the phase progression, from tellering to internship, it is assumed that if everything goes according to plan the candidate will obtain all of the necessary skills to become an assistant manager. An overwhelming amount of the time, it was reported candidates were taught technical skills, but not how to manage – even by participants who dearly loved the PREP program. One participant told her story:

The hardest thing about the PREP program is they want you to be a manager but are not training you on how to be a manager; training you on job functions but not scheduling, reports or how to run an effective financial center. I mean for the love of God, the only thing the PREP program doesn't teach you is how to manage people. It seems like it's the whole idea.

Whether the candidate learned management skills was primarily dependent on the actions of the host managers of the individual financial centers. Many host managers worked well with the intended structure and turned the candidates who were in their care into well prepared assistant managers, many did

not; the details of their individual actions are delineated in the agentive factors section. However, from a structural perspective there are measures that, when put into place, factored heavily in the development of the candidates' management skills. One practice was to examine what was truly required of an assistant branch manager and to make sure that these elements were incorporated into the learning goals. A second practice was to have management development instruction built into each phase of the program. A successful example of this is when the candidates spent their teller phase learning how to be a teller along with learning the systems and techniques used by the managers to manage the tellers, thereby teaching the candidates both the content and management.

Cultural Factors

The structures put into place by The Bank designated boundaries within which the candidates and employees could act. However, the analysis of structural factors alone is not sufficient to understand the success and challenges involved with the PREP program. Also influencing the goals of the PREP program were cultural factors. The norms and unspoken rules that guided the behavior of The Bank's employees served to both support and undermine the outcomes of the development process. The corporate culture of The Bank played a role, as well as the subcultures of the PREP program, the individual financial centers, and the regions in which the financial centers were located.

Corporate Culture

The culture of The Bank was considered to be an integral source of support by the candidates during their experiences in the PREP program. The bank saw the benefits in the program and wanted to have good assistant managers and managers available down

the line. Participants felt the company did whatever it took to make them succeed with many rewards and recognitions along the way. The fact that the company valued employee development is the reason the program was allocated the necessary time and resources to function continuously.

The Bank's cultural identity was so fundamentally strong that participants recognized they either fit the mold or they didn't. The corporate values were well known by all not as lip service, but as actions that were translated into behaviors and modeled by employees at all levels. The values were also demonstrated by higher level executives through the way they designed the incentive models and the types of community events that were chosen for sponsorship. It was considered cool for employees to carry around a wallet-size card with the corporate values on it. Posters with the company mission and values were displayed everywhere. The corporate culture really supported the PREP program and participation was viewed as a reward, something to be proud of. New bank employees often cited that the reason they went to work for The Bank was because of the culture that they knew about either as a customer or friend or family member of a current employee. The culture of the bank had a tremendous impact on the attitudes, beliefs and practices of its employees.

Many participants bought into the culture at the very beginning of their career with The Bank, getting on board as soon as the initial interview because they immediately felt comfortable with and liked everyone. The CEO as the figurehead for the culture also helped participants assimilate quickly into the bank culture as described by one respondent:

My first day working as an employee of the bank, the CEO was making a visit to [my state] for an employee rally. The very first day, the CEO of the bank is speaking to us and I got to go to that, so I bought in, I was sold day one.

The personality of the company was described as quirky, fun, warm, caring, and team-oriented. The close knit environment allowed the candidates to easily connect with others, making some want to go to work every day because they could be themselves, express their personality and not be expected to be a “stuffy banker.” At the same time, it was a demanding company to work for but the supportive culture made it “OK to make mistakes.” Many participants felt their colleagues were there because they wanted to be, not just to fill time.

Although The Bank is a large, national company, the atmosphere was that of a small company with personalized attention. Participants remarked they were never treated like a number and felt they could approach anyone in the company from their regional manager to the CEO. The small company culture encouraged people to be giving of their time, selves, and friendship; placing value on the person. In terms of how to be accepted into the company, one respondent noted that there was more cultural capital in “bringing something back to the tribe that bonded the group,” than on your ability to produce, such as a high loan volume or cross sale for new accounts representatives. The culture also dictated the customer service the candidates gave and received. It allowed the participants to treat their customers as a person, not just an account; particularly because the products The Bank sold were consistent with the culture. Fee structures and product features were designed to be advantageous for their customers. Turning the view on the

customer service culture inward, the candidates often reported being treated well because they were considered to be internal customers of the host branches:

The managers would look at it like I not only had a string of customers, I had internal customers, and oh, here's another one called a PREP candidate. They were looking at it as how can I serve this [person]....Their nature was "How can I help?"

Culture of the PREP Cohort

The corporate culture permeated the culture of the PREP cohort. Being part of an established group of individuals who were all going through the same experience was seen by the candidates as a crucial support resource and one that was supported by the company. The reason the groups bonded quickly and intensely was they needed someone to look out for them. The cohorts gave the PREP candidates a place to vent because they were never in one place long enough to build the type of relationship that allowed for open disclosure, nor was it appropriate given their training position. It was helpful to have each other to rely on and ask questions of because "you didn't want to look totally stupid when you were first starting in the branch." The cohesiveness of the group was also cited as ameliorating the stress of the frequent rotations; giving a source of consistency to an inconsistent way of life.

The PREP cohorts formed and solidified their bonds in many ways. Relationships started the first day as the structure of the PREP orientation allowed the individuals to get to know each other. Because of the high volume of required training throughout the program, classes played an integral part in the bonding of the groups by giving them a chance to spend time together. Many individuals in the cohorts made efforts to schedule

classes at the same time, often carpooling to the training sites. During class, they would go to lunch as a group or hang out and have dinner before driving home. Even though the cohorts were geographically separated, the candidates stayed in touch daily through email, phone calls and instant messaging. However, group bonding wasn't always planned for, such as when a cohort bonded around mutual dislike for the PREP manager. It wasn't necessarily the recommended way to create connections, but nonetheless, a PREP manager who frustrated their cohort served to coalesce the group.

Although the participants in this study were members of cohorts that were located in vastly different geographic areas and over a span of several years, the words used to describe the cohorts were repeated in a similar way: "We bonded," "like family," "my home in the program," "eclectic and diverse but very close," "responsible for my success," "motivated me to persevere through the program," and "fun." The allegiances that formed between the PREP candidates often made the cohort experience the candidates' favorite part of the entire program, one respondent noted: "You know, I thought that was probably one of the smartest ways to do it [cohorts]. I really respected The Bank for that because we were all kind of thrown into it."

A smaller faction of participants agreed that while it was comforting to know that others were going through the same things they were, they did not consider themselves as close with their group as others might have. One reason reported was because the respondent did not feel their peers in their particular cohort were as motivated or driven as they were. Another reason was geography as candidates often reported developing a more significant relationship with those who were located closer to them than with those who were further away. A third reason was preference for where and from whom to get

support. Certain candidates considered their support network not to be within their PREP cohort, but within the financial centers, consequently focusing on building strong relationships with the individual staffs. Regardless, whether the candidates relied on their PREP cohort or the financial center staff, the commonality of being in a transitory program was that each participant needed and utilized a support system for encouragement and counsel.

There is a significant dichotomy within the PREP cohorts: The support the individuals in the group give to each other served as a key component of the candidates' development process, yet the candidates are all developing for the same goal. The number of job openings at the time of graduation was arbitrary and varied by geographic group. For many participants, there were plenty of job opportunities and competition within the group was not an issue, as described by one respondent: "We helped each other go up the ladder together." For others, competition was alive and well, but it was not always talked about. One participant disclosed that in order to keep the peace, she did not apply for the assistant manager job she was interested in because someone in her class wanted it and she did not want to step on any toes. Another respondent verbalized the white elephant in his group:

I never got super close to them [PREP cohort] or considered them home because there was always the factor of going to be competing with these people for a job come June 1. But on the other side, we were all sharing the same experiences and would talk about it to each other because we were the only ones who would understand what was going on. So there was that level of trust there, but the thing that was never said was that if it

comes down to it, if I've got to beat you out for a job I'm going to do what I can to do it.

The connections among the PREP candidates extended beyond the individual cohorts. When a candidate met another bank employee who was currently in the PREP program or an alumnus, they described having an immediate bond, almost like being part of a big fraternity or sorority. Membership in this larger network had its benefits. Professional opportunities were more readily available as the participants acquired friends or cultivated relationships with peers who could "put in a good word" for them, if they were looking to change branches or advance in the company. There was also a great deal of pride in being part of the PREP program. For example, having top executives in the alumni network adding to the prestige of their group and made the candidates feel special.

Culture of the Individual Financial Centers

The culture of the individual host financial centers dictated the quality of training the PREP candidates received. The training the staff got on what the PREP program came either from their branch manager or word of mouth from other employees. Therefore, PREP candidates found themselves working with existing perceptions that the employees had about PREP, both positive and negative. They also had to develop strategies for adapting and being accepted into the branch cultures, including responses to the role they were in as a PREP candidate: Authority in training.

Lingering perceptions. Before the PREP candidate stepped into a financial center, some decisions were already percolating among the staff as to as to whether they would

or would not allow the candidate to integrate into the branch culture. Lingering perceptions about PREP candidates that many branch staff had based on past interactions affected their feelings about future candidates. One participant describes his experience:

People tell stories of old PREP candidates and at one point you think no way can I be as bad as that guy but on other hand no way can I be as good as the last person; almost like you are in competition with the people there before you. It is difficult to live up to or down to someone's standards.

Turnover does allow some of it to be alleviated, but perceptions [shared by the group] are built by one or two people who actually worked with that past candidate.

Context really mattered. Many times participants were welcomed into the host branch with open arms strictly because of the positive perceptions people had about PREP. However, coexisting with the positive perceptions were some negative perceptions. Participants from various parts of the country reported that their perceived view of the staff of the candidates in the program was that “all the PREP candidates did was go to class, work occasionally, and have their own schedule.” Some went as far as to think that PREP candidates were slackers or didn’t take ownership because they were always gone; or they thought that they were “alright but they are never here so I can’t count on them.”

PREP reputations also constructed some negative attitudes among employees because the candidates acted as “know-it-alls” and were “over-enthusiastic.” Some financial center staff felt when the PREP candidates came into the branch they were cocky and tried to take over, promoting the opinion that the program gives people an

inflated ego. Part of this stemmed from regular bank employees attending training class with PREP candidates, watching them barge into class, sit together, and be loud and obnoxious because they knew each other and liked to get together. Even when toned down, the candidates were still a little more hyper or outgoing than the typical class participant or person in the financial center. In these cases, instead of infusing the existing bank employees with a renewed energy, they were viewed as an annoyance.

Fitting in with the culture. Having a PREP candidate dropped into a financial center as a temporary team member can be unnerving for both the candidate and the staff. The beginning of each phase was described by participants as an adjustment period in which “you are an outsider and nobody knows who you are.” It was quickly learned that it was not possible to get acclimated to one branch culture and then expect to greet the same culture at the next branch; as one participant recalled: “It just smacks you in the face that these are individual proprietorships with the manager in charge. They may sell the same things but they are run totally differently.” The participants frequently described the timeframe for their cultural acclimation as the first week or two of each phase. The irony was found at the end of the phase when it was actually hard for many to leave because they had reached a comfort level as part of the branch team, going out to dinner with the staff and participating in their activities.

Acculturation required that participants adopt several tactics. The most common approach for the first few days was observation and “stepping lightly for the first week or two until you figure it out.” There were many visual cues the participants looked for. In the break room, color-coded goal charts, the way the schedule was posted, and what was chosen for display all indicated whether the branch was “operations or production crazy.”

They could tell if the branch was “by the book” or if everyone joked around; this was important to discern so the candidates didn’t jump into one culture thinking it is the other and alienate their new team.

Observation also helped the candidates understand the unspoken rules that guided the behavior of the branch employees. They paid attention to who went to whom and for what reason, when you could put a request or issue in front of one person and not another, who was the best at their respective job, who were tuned into the business needs of the bank, and which employee was the discernable leader of the pack. It was useful for the candidate to know who the key players were so they could request that the manager have them work with these people. Studying the dynamics of the branch also provided data about how the managers were approached. It helped participants recognize such issues as whether employees called or buzzed the managers at their desk, if they waited until a specific time of day, or just walked up and said they needed help. Observations also exposed which groups of branch staff didn’t think highly of their management team and which were the tight groups.

Ages of the employees in the financial centers also gave clues to the candidate about branch norms. For example, an operations supervisor who oversees the tellers and who is over 40 has probably been in her position a long time. Her age and position suggested that she was likely to perceive that any disruption of their system would not have a good outcome. Conversely, if the branch manager was in their twenties and it was the first financial center they had managed, the candidate was apt to assume that she or he might be more amenable to change.

The extent to which the candidate had to change themselves to fit in and gain acceptance was in response to who they were training with and who they were. One male participant recalled that during his new accounts phase it was easy to integrate into the culture because all of the new accounts reps were like a boys club of young males; he was taken under their wing and given access to the group right away.

Asking questions of the financial center staff was critical to the participants' success because rules were often unspoken and informal, yet breaking them had serious ramifications for the candidate. If a candidate started to do something a certain way, and a co-worker looked at them funny or asked why they were doing what they were doing, it was clear that it was "because it wasn't the way things were done in that branch." For example, one financial center allowed their employees to have water behind the teller line and another financial center did not. Some participants found that writing down questions about issues that repeatedly surfaced and asking the next branch staff, up front, what their rules were about things was a quick way to ease the transition into the culture of the subsequent branches.

The supportive culture of The Bank was often reflected in the sub-cultures of the individual financial centers. Therefore, the reactions the staff displayed to having a PREP candidate in their branch were typically positive. The financial center teams were described as wonderful, welcoming and nice. Many employees were curious about the program, thought it was cool, and were usually pretty excited about having an extra person around to help out. The openness and friendliness of the staff allowed them to goodheartedly laugh and kid with the candidates about how little time they would actually be in the financial center because of training and meetings. Due to the

welcoming environment, it was felt by several participants that they “never felt like a lost soul out there” and there was not a branch they didn’t want to go to every day.

However, there were times the participants thought the staff may have felt threatened by them, which made it difficult to mesh with the existing culture. One participant explains what that was like for her:

I was at a branch where I know one of the tellers didn’t like me because I came in and thought if my manager is not going to give me something to do, I’m going to make this branch better while I’m here so that I can look good like I’m performing. If he’s not going to give me anything to perform on I’m going to make my own stuff to perform well on.

Sometimes the tellers and new accounts representatives feel overpowered because you are taking on their tasks. You’re only there for a month or two months to look good so you’re essentially purposefully showing them up. But it’s easier to work really hard for and look really good for a month than the person who’s been dealing with the ups and downs, and has been there for years and has dealt with the management changes.

This experience portrays the incongruity the PREP candidates often faced when the structure of the program set up the expectation that the candidates needed to prove themselves, but in proving themselves, they risked alienating the very people they were relying on for their development.

Participants reported getting better at assimilating into the culture of the financial centers as the phases progressed. One participant recalled showing up to his first branch and introducing himself basically as having no clue what he was doing. By the third

rotation, he was jumping right in, letting people know what he had learned and what he was there to do. Experience also helped the candidates blend in and mold themselves into the branch in order to “not break up the team or be considered the broken link in the chain.” This meant carrying themselves in a way that was dictated by that financial center. For example, a formal branch with higher end customers called for a more reserved, professional demeanor, and a branch where 19-year-olds were running things required a more relaxed yet professional approach to the staff and customers. Assessment of the staff and the clients was important in determining the PREP candidates’ behaviors.

Authority in training. As future managers, PREP candidates were in a unique situation: They existed in an in-between dimension of being authority figures in training, without the power and often the knowledge to exercise authority. For development purposes and per the structure of the program, certain amounts of authority in specific situations could be assigned to a PREP candidate, if the host manager felt comfortable doing so. However, when the level of authority is unclear and varies as much as it does from branch to branch and person to person, the changing boundaries could be confusing and frustrating for the PREP candidates. For instance, one respondent who was an internal hire lost all the supervisory authority she had as a teller when she entered the program which she felt was “totally lame.” A candidate could go from one phase with a host manager allowing them to approve overrides to the next phase where the host manager limited them to the duties of opening new accounts, and having no authority. This transition from one site to another was described as hard because it required a shift in thinking and behavior to adapt to the demands of the program.

The inconsistencies of authority built into the PREP candidate role were also confusing for the financial center employees who had to make decisions about how to perceive the candidates' authority. The frequently shifting boundaries of PREP authority allowed the branch staff to pick and choose their approach to working with the candidates, which became accepted, unspoken protocol for the branch. For example, some employees chose to make the program a rite-of-passage for the candidates as one participant described her experience:

Please forgive me because I can't think of a more professional way to say it, but to a certain degree you kind of became everybody's bitch. Because there was an "I need this, go do this," or they would need a coffee run, or "Hey, I don't want to open this account right now, I'd rather take an extended coffee break so hey, PREP candidate, do this for me" kind of thing. And to a certain degree even though you were at peoples' mercies, that in itself kind of had a power dynamic to it to because people knew you could do things for them and you did them. So I was happy to do whatever to get in good; almost like pledging.

Another participant described a similar situation where the culture of a financial center demanded that he knew the word "trainee" was at the end of his title. The staff would ask him to get lunch for them and not always in the nicest of ways. The confirmation about this dynamic became apparent when he went back to the branch to work after graduation and was shown respect as a manager. He then knew that it was not about him but about his position.

While being a PREP candidate sometimes came along with initiation-type experiences, being in the PREP program frequently garnered the candidates respect from financial center staff because the employees knew they were soon going to be in management. Many were cognizant that the candidate may one day come back and manage their branch. Or, if the employee liked the candidate they considered wanting to work in the candidate's branch after the candidate graduated. Therefore, the employees treated the candidates well because the candidates were "looked at as a resource and didn't want to burn a bridge."

Yet, having limited power without means of enforcement that someone with formal authority has sometimes put the PREP candidates in a difficult position. Many respondents ran up against resistance from branch staff in the form of: "You are not the boss and I know what my management wants from me" attitudes. It was recalled by participants that there were always people in certain branches who would say: "I'm not going to listen to her." One participant had a situation where he asked an employee to do something and the operations supervisor of the branch flat out told the employee not to listen to him. The participant let it go and later talked to the branch manager about it. The manager essentially said to let the operations supervisor do what she does, promoting the theory that some of the staff challenged the PREP candidates simply because they could get away with it.

Compounding employees' rebellious actions was when their defiance was accompanied by lack of support from the branch manager; as it happened to one participant:

If a branch manager gives you too much power it is a bad experience because employees know you are not there to stay and they don't really have to listen to you. So you can try to enforce policy but it's just going to backfire. It's confusing for them. God forbid the manager makes you enforce some policy the employees haven't embraced in the past because the manager is not giving you much support and you're pretty much screwed all around.

Through trial and error, several participants found a way to make a dent in the cultural armor: "They needed to know how to treat you, how to react to you." One participant related the turning point when the staff stopped directly challenging his requests:

I think it was a combination of when I would recognize it and address it and say 'No, this is not acceptable.' And at that time when I confronted it and said 'Hey, look this is what you're here to do, this is what I'm in charge of and this is what I'm requesting you to do.' At that point when I laid down the expectations to them even though it had already been laid down by their branch manager, I think at that point they go, well OK. I think that comes after their being aware that I am qualified to do what I am doing. In one way or another leading up to that I have demonstrated that I do have the knowledge, I do have the experience, I do have the skills to do what I'm doing. So they've already seen that, along with the confrontation where I see them and I address that no, this is not acceptable

right there. Then usually from there on it's OK and it runs a little bit smoother.

Often, staff resistance was rooted not in direct hostility but in confusion over the process of training a candidate who makes mistakes as they learn and coming to terms with the fact that this person is going to become a manager in two months. As one candidate was finishing up the program, he found himself "having tellers explain things to me and look at me like, you are going to be an assistant manager next month and I'm a teller and I'm telling you how to do everything?" On occasion, this confusion morphed into resentment as some staff members took issue with a candidate being given authority to make decisions that they themselves wanted because it would make their own jobs easier; an example being the ability to release check holds. When the staff did not understand the role of the candidate in the branch, they did not support candidates being able to make these calls when they themselves couldn't and had been with the company for a longer period of time. As one participant described it:

Technically, you're not their boss you're in training. But you're ultimate goal is to do what their boss is doing...that created a little bit of a problem because sometimes you would see it from the employees who were looking at you like, wait a minute, why are you being a leader, you're still learning.

Being a manager in training drew certain boundaries for the participants, such as how close of friends the candidates could become with the staff. The participants were mindful of the need to maintain professionalism at all times, making it difficult to befriend the staff on a peer level. One respondent verbalized the reason they paid

attention to their behavior: “In PREP you don’t want to do anything that will make people think less of you or jeopardize the respect you would get in your new position.” Getting too “buddy-buddy” with the employees by going out for drinks with the staff after work or talking about the partying the younger staff would do on the weekends had to be done with caution. However, while this was a frequently reported point, there were also many reports of successful bonding with financial center staff through participation in their branch activities; for example going for daily coffee runs with the employees and attending informal staff dinners.

Employees often bond by complaining to each other and sharing opinions. The participants did not feel it was appropriate for them to engage in such discussions, making a point to stay off the branch gossip grapevine and to make sure they were never used as a go-between person for employees who had problems with each other. One candidate felt she was able to work with the situation by listening to the tellers talk but not responding. That way she was able to gain their trust and they would start to show her things because they felt like she was on their side even though she never said anything.

The result of walking these lines was that despite the support of the PREP cohort, being a manager in training could get lonely. It was tough as one participant recalled:

Now you’re going into a situation where you basically see strangers all the time, and it kind of sucks because you don’t have those relationships at work, you don’t have friends at work. So it’s very tempting, and especially when you’re in a management position it might be an uncomfortable situation because of the staff, it can be very tempting to say, you know what, let’s just be friends, instead of let’s hold that management position.

Because nobody wants to be the stranger all the time, nobody wants to be the outsider all the time.

Sometimes fitting into a financial center culture was unintentionally easy.

Participants reported that when a branch was so poorly run with the manager hardly ever around, the employees were desperately grateful just to have the candidate there supporting them. Dysfunctionality at the branch actually facilitated the role of the candidate. Arguably though, it did not necessarily make the branch a stronger or more vital one. However, the extra help of someone taking on the role of dealing with the upset customers and alleviating the work load eased so much stress on the staff that any chance of nitpicking about authority and acceptance of the candidate was a moot point.

Employees of The Bank were not the only ones who dealt with the ambiguity of the authority-in-training dynamic; customers were also woven into the fabric of and impacted by the branch culture. One participant summed up how this played out during his experience:

What was difficult was when the customers would ask for a manager.

What do I say? Am I the manager? Am I a manager in training? Do I tell them that I'm a manager in training or do I tell them that no, I'm the manager but I don't know what you're asking for on this loan or other product that the bank has which I know nothing about. How can I be a manager if I don't know that stuff? So that was the first question I asked after my first week to the branch manager. I am the assistant manager or manager technically in training but what do I tell a customer when they ask what's your position here? They said say you are one of the managers

and if you don't know what to answer, just say that's a very good question, let me get my specialist, if it's business or loans or what have you, and that worked great.

Culture of the Regions

The Bank designates about 17 to 25 financial centers in a given geographic area as a *region* and each region is managed by one regional manager. Each regional culture, shaped by the attitude and direction of the regional manager, influenced the types of experiences and opportunities the participants had during their program. The regions that furthered the candidates' growth were those that embraced training and development as part of their value system. Branch managers in these areas tended to not throw a PREP candidate into a situation they were unprepared for or overuse them as filler on the teller line. These regions also had the most effective mentoring of PREP candidates; some even having mentors who were not PREP alum, but regular bank employees who could help the candidates develop their skills during the program.

On the opposite end of the support spectrum, reports surfaced about regions that were so competitive with each other and dysfunctional in their cultures, any bonding of, or assistance to PREP candidates across regional lines was frowned upon and almost forbidden, even though they were in the same cohort. One participant described her experience:

In our state there's so much competition between the regions that it's very cutthroat and we didn't realize this as members of the PREP program – and I'm speaking for the whole group. We went from region to region to region and we thought oh, everyone wants to help everyone and wants to

do what's best for the company and that's not true. They are very, very regionally defunct.... We had a PREP colleague who opened a branch...so we went over to her branch for a half a day and helped and we got in trouble. Because why are we helping another region open a branch? Well, because she's our *friend*. We thought the whole company was in it together, it's really not like that here. There's so much regional competition that it gets really, really ugly.

Another cultural influence on the regional level was the catch-22 of the close knit culture of branch managers in a region. There was a widespread mentality that candidates really needed to prove themselves in the PREP program. This influenced many participants to not speak up about the lack of training they were getting from their host manager because word travels fast along cultural grapevines. They did not want to risk hiring decisions at graduation by being seen as a complainer or incompetent. Financial center managers had tight bonds and loyalties among their group of managers in the region and as one participant described: "You upset one manager and you're upsetting all those manager's friends and buddies." The tight bonds of the financial center managers could also be tricky in other ways. For one participant, it was difficult for him to gain full acceptance by the managers in his region because while they were united, they were united against certain company changes that were coming down the pipeline. As a PREP candidate, he had a good relationship with the managers in his region, but having exposure to and supporting the bigger picture of the bank's vision made it tough for him to completely fit in as "the corporate boy."

Agentive Factors

While structural factors formally dictate how the PREP program was set up and cultural factors uncover how group norms managed the boundaries of the learning process, agentive factors help us understand what it is about the individual person that creates successes and failures in the management development program. The agentive factors of the PREP candidates are examined from two perspectives: The dominant characteristics of the participants that influenced their experience and the strategies the participants used in working with the branch employees. Also discussed are the individual actions or the agency of the host financial center managers, financial center staff, mentors, and PREP managers who were involved in the development of the PREP candidates.

Characteristics of PREP Candidates

Several agentive characteristics unique to the candidates surfaced in this study and were identified as either helping or hindering the program experiences. The ten factors that emerged most frequently from the data were: Self-directed learning, age, independence, aptitude for change, sociability, tolerance for stress and ambiguity, match to corporate culture, drive, confidence, and humility. Also included is an inventory of other factors less frequently identified by the participants, but still noted as significant to their understanding of their experience.

Self-directed learning. Being self-taught and self-motivated had a significant impact on the PREP program experience for the participants. The recurrent attitude reported by the participants was: What they got out of the program was going to be up to them. One respondent summarized the situation: “You can’t just go into a financial center

and have everything handed to you. You have to take responsibility for your role; 50% percent is on the people in the financial center, 50% is on you.” When the candidates did not get the training they were supposed to be getting, they took it upon themselves to use their resources, such as manuals and the help desk to figure out how to get something done. Several participants were vocal and initiated conversations to address their lack of training with the host manager, PREP manager or regional manager. They attributed their motivation for initiating dialogue to: “It was my career and my training and I wanted to make sure I wanted to get the most out of it.” Another participant echoed the following sentiment:

That’s where you have to take charge of your learning. I could have sat there and complained the entire time, oh no big deal, I guess I’m not learning. But I knew inside of myself that I had to learn the lending. That’s my job and that’s why I took it upon myself and told them I’m not learning anything here, flat out.

Several candidates reported developing this skill as they progressed through the program. It was common to hear: “I didn’t take charge of [my] own learning [during the] first two phases. I learned by the third phase that as a PREP candidate I am in charge of my own learning and making it fit within the financial center structure.”

In addition to the take-charge attitude that helped the respondents do well, they reported factors that contributed to their ability to learn the tasks at hand. For example, candidates reported the use of keen observation skills, which allowed them to pick up on the established practices of the financial centers; the ability to do this was essential both when the candidates were given the chance to work closely with someone, but also when

they had to watch the person from a distance because they were not granted access by the employee to sit with them and observe. Many also reported simply the satisfaction they felt in learning and getting to know everything about what they were doing.

Technological skills also played a significant role in their learning experience. It helped a great deal when the participants were technologically literate and able to quickly pick up on policies and systems which allowed them to take charge of their own learning.

Age. The ages of the participants when they went through the program ranged from early twenties to early fifties. Participants on each end of the age spectrum addressed age when factoring in what it was about them that influenced their program experience. The youngest representatives felt their age both helped and hindered. On the one hand, they were “young and hungry for opportunities” and their age and life circumstances gave them flexibility in traveling and being open to taking certain jobs. On the other hand, one participant reported that as a manager in training in her early twenties, customers frequently asked her if she was the high school intern and wanted to speak to the “real manager.” One younger participant also talked about age in relationship to experience. He noticed a difference in the success level of his peers between those who had a lot of life and management experience under their belt prior to the program and those who were young and green by explaining:

There was one [candidate in our cohort] who was a manager at [a large retail company] and did a phenomenal job. So the people coming to the table with experiences coming into the PREP program were better off than the people who had been a teller for two years and then a new accounts rep for a year and then you’re going to do this because it’s a stepping

stone. You can definitely see the difference between the people who either had the experience beforehand and/or during the process. It's amazing that there are some PREP graduates who are not making it or didn't make it and there are others that did a phenomenal job. Some of it is the person behind it, but a lot of it is the experiences they had either before they came on board or the experience they had through the PREP process.

In the middle of the age range, those who were in their late twenties and thirties did not broach the topic of age. In this age range, age did not define how the candidate was perceived by others; it became more of a background distinction, allowing for other characteristics such as learning agility or motivation to take the spotlight. Age came back into play as participants in their forties brought up their "life experiences" as having contributed to their success. Those in their fifties also felt age influenced their experience by being an asset. They were seen as more mature and the "sense of stability they brought to the group" was welcomed.

Independence. Many respondents mentioned that not only did they work well independently, but that it was an important skill to possess because "they were being managed remotely through a brand new process." Although the participants highly valued receiving guidance during the program, the transitory structure of the program was liked by many because the constant movement and changing of host managers mandated that the candidates take charge of their learning, which allowed them to maintain a certain degree of independence.

Aptitude for change. Adaptability and flexibility were also used to describe one of the fundamental qualities needed to survive PREP: The willingness to deal with change.

The candidates who loved a changing environment, variety, and expected and embraced transitions had a more effortless experience. Those who embraced the transitory nature did so because they felt they would have become bored if they had “stayed in one place too long.” They liked keeping the challenge going by rotating through each new phase. Those who did not welcome the changes professed having a more difficult time of it, as one respondent described:

For me personally, it [phase transitions] completely goes against my personality. I am very outgoing in a comfortable situation. I need my own space. I need a desk where I can set up my tools the way I need them to be effective as a sales person. I need a certain brochure or certain things there that allow me to have the tools to be successful. But in the PREP program when you go into a branch they don’t always have a place for you.

In addition to not having the means of settling into a routine, the nature of the change was unnerving because the pace and structure never quite allowed the candidates to become an expert in anything. Given the level of ambition typical of a new candidate accustomed to being experts in their former jobs, this feeling of never having full mastery of every task was tough for some:

...I don’t want to say the expert, but I’m one of those people that has to be so embedded in my job that I can do my job better than anyone else can do my job. And that makes me feel worth or whatever you want to say. It makes you feel validated. So the PREP program, they put you in these situations where you go in, you’re successful, you learn a new task, you don’t really have time to be comfortable because you don’t *really* work

there, and right at the time you get comfortable they pull you out and put you somewhere else. So for me it's like I never mastered one task. I never felt like I knew everything there was to know about being a teller or everything there was to know about new accounts.

Sociability. Being a “people person” was consistently cited as a characteristic that helped the participants make it in PREP. Meeting people was the easiest part for many of them and as a consequence they were able to “interact with a new group of people every few weeks,” a requirement of the job. One respondent described each transition as an opportunity to “get” to meet twenty new people versus some candidates who reported that they struggled through the transitions and viewed each new branch as twenty new people they “had” to meet. One participant admitted that the transitions were the most difficult part for her because she is not outgoing and talking to people was something she had to force herself to do. The friendly, sociable side of the candidates’ personalities came through as a strength, helping them build social and professional networks, and influencing the branch employees to take time out of their day to teach them. Being sociable was also a duty some felt they took responsibility for: “Our job as PREP candidates is to get over that period of being outsider ASAP; we need to go out and proactively engage the staff.”

Tolerance for stress and ambiguity. PREP is a difficult, intensive program to go through and it takes a high tolerance for dealing with the pressures that come along with it. There were many sources of anxiety for the candidates, the first being the constant transitions. The frequency of change posed a unique psychological stress just at the time the candidates became comfortable in their environment. There was just enough time to

form attachments with the staff and become somewhat competent in a task before they became “the new kid on the block again” and were repositioned and required to learn something new.

A frequent descriptor of the difficult part of PREP was “the constant not knowing.” It was the not knowing of a process or responsibility or even where they would be hired upon graduation. The host branches were typically chosen toward the end of each phase, so there was also an underlying instability of only being able to mentally plan out so far into the future, causing an underlying uneasiness recalled by one respondent: “For an entire year, I didn’t know where I was or what I was doing half the time.” One candidate described how the transitions took a toll on him:

I was on an emotional roller coaster. There was a manager that was nice that you’d get along with. Then you’d run into a manager who doesn’t want to deal with anything and you kind of take it home. It was very, very difficult jumping from one branch to another.

Being in the PREP program was like “living in a fishbowl” for a year, which was a huge source of anxiety for many “because if you make a mistake everyone is going to know about it.” Making mistakes is part of the learning process, but making them was compounded by the fact that candidates were always making them in front of people they were going to be managing in six to nine months. One respondent depicted all the different people involved in creating the fishbowl:

As you go from branch to branch you are going to come into contact with people and meet people who a) maybe wanted to apply but weren’t eligible or b) maybe did apply but weren’t selected or c) look at you and

think, ‘You want to be an assistant manager? I don’t think so.’ When you go from branch to branch you’ve got managers looking at you going, ‘If I had an opening would I hire you?’ You’re regional is looking at you going, ‘OK I have confidence this person can be an assistant manager, I’m giving them a year, let’s see what this person is made of.’ You are going to assistant manager meetings. All of these people have secure assistant manager jobs; they’re looking at you to see if you can do the job. You’re going to the training events with the trainers. It’s like you’re on stage every minute of the day.

In addition to managing the stress of living in the spotlight, the participants who were cognizant of the fishbowl dynamic created fewer problems for themselves by being aware of the repercussions of their actions: “I was really cautious about what I said and how I felt....I was more careful with my opinions about how I felt about my offices and the different managers I was working for.”

Match to corporate culture. Given the strength of the culture of The Bank, it is not surprising that several participants mentioned that one of the factors that helped them in the program was when their personality and values were closely aligned with the demands of the corporate structures and the beliefs and values of the company. For example, some participants identified themselves in the compensation structure of the pay for performance philosophy which allows managers to dictate their salaries by how successful their branches are. Others aligned themselves with the high levels of customer service which the company emphasized. It was most common for the respondents to identify with the corporate values which, in doing so, allowed them to excel in the

program and transition into the assistant manager position as measures of success in the company were defined by the corporate values.

Drive. Determination, motivation and drive were mentioned repeatedly as traits that allowed the participants to persist through the program. Having a goal and wanting to be successful made the difference during times that training in the host branches was lacking. The shadow side of determination was reflected on by a few respondents, remarking that while their ambition helped, it also hurt them because they were in too much of a hurry to finish the program to want to put in their time thoroughly in each phase. This trait also contributed to some creating unrealistic expectations for themselves, which hindered their ability to learn by adding more stress to an already difficult process.

Confidence. Confidence, or lack of, was a determining factor in the participants' PREP experience. The interesting part about the confidence trait was there were many angles taken in describing how it played a part in the experiences. At times, confidence was reported as a necessary skill to have and that it was either part of their nature or they were socialized during their childhood to feel confident in their ability. Even with substantial confidence there were times when it was simply important to "act confident even though you are a management trainee and don't know anything."

Candidates who lacked confidence reported that it held them back because they were not able to "sell themselves" as easily as others. Confidence was an important skill to have because in spite of the reviews and feedback given to them, the candidates also needed to be their own advocates about the successes they were having in the program.

It was also possible for a candidate to lose confidence along the way. For example, one participant had a background in retail, which helped him transition into the

PREP program easily and feel secure in what he was doing as a teller and new accounts representative. When it came time for the consumer lending phase, it all started to hit him how quickly the program was moving. Having no lending experience, he felt completely uncomfortable and unable to move on to the next phase, which was mortgage lending. Having so much foreign information thrown at him made him wonder if he was really the right person for the job. This candidate persevered through this “frustration period” through the support of his colleagues, but it elucidates a hidden trap within the structure of the program: The assumption by the candidate or those managing the candidate that they will be as successful in the later phases just because they transitioned easily into the format in the beginning.

It was also reported that confidence could be damaged by a bad experience in a branch, causing the candidate to be “wary and shaky about going to the next financial center.” Finally, just as being too ambitious could cause problems for a candidate, overconfidence in being able to defy the learning curves also did, as described by a respondent:

The negative thing for me going in was overconfidence. I’ve heard from others that’s been an issue too, especially with externals. They come in, and just graduated college with their degree and feel pretty good about what they’ve done; and they come in and they have a cockiness about them. For me, it was more of an overconfidence of, I’ve been with the company for a while, I know what the company is about, I’ve been in the branches before, so it shouldn’t be that much of a learning curve for me.

Humility. The ability to express humility and graciousness for the people the candidates were working with had a big influence on the relationships developed with the employees in the host branches. Being able to swallow one's pride and be okay with learning from their future subordinates who know a lot more than they do, was critical to learning. This quality is also what kept a candidate from barging into a new host branch with a critical eye ready to show everyone where and how they could improve – the surest way to alienate themselves from their new team.

Additional characteristics. While not mentioned as frequently as those discussed above, there were several self-reported characteristics cited by the participants that facilitated their success: Patience, intelligence, loyalty, discretion, honesty, trustworthiness, ability to think outside the box, having a thick skin, commitment, strong character, perfectionism, ability to develop others, enthusiasm, responsible, team player, and malleable in any situation. There were also additional characteristics cited by participants as hindering their experience: Lack of organizational skills, too analytical for the sales aspect of the job, too much of a need for details in the big picture view of PREP, and no family support network in area. These factors went against the natural flow of what it took to succeed in the program; therefore requiring the candidates to work harder than others in these areas.

Strategies Employed by Candidates when Working with Others in the Host Branches

Coming out of the PREP program and getting hired into a good job as an assistant manager is the obvious goal for candidates. However, many participants learned along the way that there are certain things that they could do that would enhance their experience. This was critical to their success during the program because as one

respondent adeptly discerned: “You need to do well in the program and you also need to learn how to be a good assistant manager, sometimes it’s not the same thing.” Strategies were quickly learned about how to prove themselves as an asset to the branch, interact with the host managers, and get others to teach them.

Proving themselves. It was important for the individual PREP candidates to overcome any preconceived notions that they were just in the branch to come and go as they pleased and take two hour lunches. The staff needed to see with their own eyes that the new person in their branch was there to be a team player and to work hard. One respondent described it as:

If you go to a branch that has experienced a bad PREP candidate or to a branch that has had no PREP experience whatsoever...it’s trying to switch that manager’s view on what a PREP candidate is....If you end up at a good branch, it’s just really trying to prove that you’re an asset to them.

One of the big selling points of the PREP candidates with the branch employees was when they were flexible in what they were willing to do in the branch. For example, one participant in her internship phase took the initiative when things got busy to open up a drawer on the teller line and pull customers from the lobby for new accounts. These actions that showed the employees she was there to support them and not just a body sitting at the assistant manager’s desk were her ticket to staff acceptance.

Often, PREP candidates were more current on policy and procedures than some employees because of the large amounts of training they were getting. Being seen as an information resource gave the candidates a lot of knowledge power with the staff. One

respondent said she “took advantage of that” by staying up on policy because being seen as a resource was a valuable thing.

There was also a need for the candidates to prove themselves in order to ensure their hard working reputation transcended the layers of authority. The candidates directly reported to their PREP manager, but the PREP manager relied on second hand information from the host managers for feedback about the candidates’ daily job performance. The candidate had to prove themselves to their PREP manager through their temporary host manager. One respondent talked about how this dynamic actually prevented him from asking his PREP manager to remove him from a host branch situation he felt was not conducive to his learning:

That for me was never an option....my [PREP] manager who just hired me, who doesn’t spend time with me, doesn’t see what I’m trying to do, just can hear from these other managers. I felt if I were to go to her and say this, this and this, I’ve got to get out of here, her normal reaction is going to be, OK, this employee has got some issues. I really felt like I had to prove myself [to my host manager].

Self-initiated interactions with the host manager. One of the biggest obstacles to learning for the PREP candidates was lack of communication with the host manager. During times that participants found themselves in the care of a manager who was not involved in their program responsibilities, respondents worked around the situation by initiating communication about logistics, expectations, and performance feedback. Many reported personally calling or emailing the host managers to let them know about their arrival and to ask questions about specifics they needed to know for their first day. They

also took this chance to let the managers know how far along they were in the program, what they were going to need to learn in that branch, when they would be in class, and generally lay the framework for their arrival. These individuals realized this was a time to improve their reputation with the host manager and ensure that he or she would get the most out of the next rotation.

Once in the branch, the candidates needed to continue to communicate with the host manager. Although it was an expectation of the host managers to be responsible for the candidates' learning, there were frequent reports of little to no contact with the host manager as one candidate recalled: "I had one branch where I didn't even sit down and talk to the manager until three and a half weeks after I got there. He never even acknowledged my being." Many candidates realized if they were going to find out what was expected of them and how they were doing, they had to take it upon themselves to schedule meetings with the host manager. Meetings with the manager allowed the candidates to find out what the manager's goals were for their branch and what their individualized rules were. Some candidates struggled for their first few phases due to unclear expectations from the managers and thus they were forced to ask up front what the managers expected from them.

The need to initiate contact did not end with the discovery of the host managers' initial expectations. The candidates also needed to make appointments during the phase for continued feedback; one participant explained: "At least once a week I made sure I met with one of the management team members and did a review of what they'd observed, what I'd observed, and what they thought needed to be improved upon."

Just as the candidates needed a support network, they needed someone local they could go and talk to about their performance. Participants of all demeanors and ages expressed the need to know how they were doing, particularly because the host managers were the only ones who directly observed their actions. One respondent described the motivation of making her first appointment with her host manager: “I’m scared to death and I don’t really work here so I need to know if I’m doing OK.” The candidates only had about a year to learn an extraordinary amount of information and skill sets; they wanted to know the good and the bad about their performance in the form of immediate, real-time feedback so they would have an opportunity to improve their work.

Getting others to teach you. It was never guaranteed that a candidate would show up in a branch and that the host staff would actually teach them what they were there to learn. More frequently than not, the onus was on the candidate to work the situation so employees would be willing to teach them. Whether or not a candidate had the skills to make that happen played significantly in their success with the program. Many financial centers are extremely busy with lines out the door from open to close with loan applications piled high. In order to even get face time with someone for training, it was up to the candidate to make it happen. One respondent described how she got help by “really immersing myself fully, doing everything I could to clear that lobby so they had an extra five minutes to help me.”

In addition to the candidates making it physically possible for the staff to help them by freeing up their time, the candidates reported how they made sure the person who was training them felt like they were the one in charge, even “inflating their ego” a bit, letting them show them procedures and their individual way of getting something

done, even if the candidate had seen it before. It was important to not come across as a know-it-all, to be gracious and cognizant of the time it was taking the staff member to train them.

Some candidates found they needed to take the initiative to get people to *want* to teach them; as one respondent put it: “If you weren’t scratching their back, they certainly weren’t looking around for you when something new was going on.” Suspensions about the candidates on the part of the staff, cultivated primarily from a lack of communication with their branch manager, also had to be overcome. Frequently, the only direction these staff members were given was to train the PREP candidate for the next two months on what they did. Therefore, many greeted the candidates with a less than welcoming attitude because it was assumed that the once they trained them, the candidates would spend the rest of their phase in the branch taking business away from them. Several participants found when they took it upon themselves to address the issue with the new accounts and loan representatives right away “the tension magically disappeared because this was not communicated to them.” Incredibly, all it took was for the candidates to say, “I don’t get commission, I’m putting your employee number on the applications.” Thus ensuring that the branch staff member not only was not wasting his or her time, but they were actually getting credit for the work being done.

A final strategy of the candidates for getting the host branch staff to teach them was to just not irritate their new team. Having a PREP candidate on the host financial center team was considered to be a benefit by many of the staff because they either just liked the candidate as a person or it was a relief to have an extra person around to pick up some of the workload. However, a quick way to antagonize the new host staff was to use

the magic words: “They did it this way in the other financial center.” The candidates needed to keep the perspective that they were a guest in the financial center and while there is policy, there are many ways to achieve the same end. It was important for the candidate to ensure that the financial center employees felt they were doing the right thing. A candidate’s ability to negotiate the workload and the sentiments of staff became crucial to an experience.

Host Financial Center Managers

In describing the factors that impacted their learning during the PREP program, it was frequently reported by the participants that “what it really came down to were the individuals managing the branches.” Not only was the host manager a defining influence upon the branch’s culture, but individual actions on the part of the managers shaped specific situations that were both favorable and non-favorable for the candidate.

Setting the expectation for the host staff. In welcoming the candidate into a branch, the very first milestone was whether the staff had been informed by their manager about the candidate’s arrival. This was sometimes well communicated, but sometimes overlooked. Several participants reported showing up at a new host branch to have the manager greet them with, “You are starting today?” Communication about the candidate’s arrival was also essential with branch security; some participants turned up for their first day only to have to wait outside the branch because the security guard did not know they were coming. The inconvenience of this was expressed by one respondent:

I mean, not that when you come in they need to have banners and balloons, but when you walk into a branch and the tellers don’t know who

you are or why you're there and you're going to work there for three or four months [it's concerning]?

After a candidate arrives in a branch, one of the important actions taken by the host managers is to set expectations for their staff about how to receive and work with the PREP candidates. When the host manager was explicit in laying the ground rules for their staff and explaining the candidate's role, it made it easier for the staff to assimilate the candidate onto their team because they had the information they needed to be able to do it. One participant recounts his successful introduction to a new host branch:

When I first got there, the manager, assistant manager and I all sat down with the new accounts representatives and basically she just put it out and said, 'You've heard of the PREP program, you know what it's about and this is going to be our next person coming in to work with us in the new accounts phase. He's very good and he's definitely here to learn from you guys. But on the other side, he's training to be an assistant manager, so you need to be treating him like he's an assistant manager.' It was really the manager coming in and saying, 'This is what he's training to do so we're going to help achieve that in every way possible. If he's asking questions, you're going to help him and if he's asking you to show him something or do something, you're going to do it. Of course, if you think it's out of line or weird, come to me (laughs).' It was very cool because it was very open and very honest.

The managers who did not take the time to set up the expectation for their staff inadvertently made the transition into the branch more difficult for everyone. One

participant recalled that an unclear introduction set up a dynamic that was not “easy for them [staff] to come to me or for me to go to them with concerns, issues, or solutions.” In one instance, the inadequate introduction of a candidate intersected with unclear manager expectations. The participant received feedback on her review from her host manager that she needed to “step up and take more of a leadership role.” However, the candidate felt she was not introduced into the culture of the financial center in a way that allowed her to do so and if she had tried to exert authority on her own she would have gotten a bad reputation. Essentially, successful experiences came down to the actions that host managers took to pave the way for a candidate to be accepted and understood by the staff in the financial centers.

The managers who were supportive and prepared for the candidates were available, paid attention to the candidate, and gave feedback. Some participants noticed that some of the better managers to work for seemed to take pride in the fact that they were part of the process of developing a new manager, especially when the candidate went on to do well. The supportive managers also were encouraging, and when the candidate made a mistake, they told them that “it happens to the best of us, just learn from it and move forward.” These host managers went out of their way to be helpful because they did not want to see the PREP candidate fail during the program. A supportive manager was aware of the balance that needed to be made with having the candidate help out in the branch on a variety of tasks and ensuring that the candidate accomplished their phase learning. On the positive side, there were a multitude of stories about host managers that were on board with the bigger picture of the development program and made sure that even when the chips were down or things seemed really busy

that the PREP candidate was able to stay in their role and focus in the short time they had on what they needed to learn. Conversely, there were vivid examples of managers who disregarded their responsibilities as a host manager. One respondent recalled her experience with this as a new candidate:

I think I only had a total of six days at the branch after the teller training.

One of those days the branch manager had me cleaning out the back room.

After only a couple of weeks in the program you don't want to rock the boat too much [by saying]...Excuse me, I just don't think...[this is what I am supposed to be doing].

Developing the candidates' management skills. In addition to taking actions that were supportive of the PREP candidate, one of the most significant outcomes of the PREP program rested with the host managers: The development of management skills. The structure of the program can take the candidate to a certain point, but individual actions on the part of the host managers created a huge dividing line among the participants as far as who felt they were ready to take on the assistant manager role upon graduation and who did not.

There were several ways the host managers were able to successfully develop the PREP candidates into assistant managers. First, they were open to teaching the candidates and "willing to give the up the kind of control the candidate needed to work with the staff in learning how to manage." The managers who gave the candidates the appropriate amount of authority remained involved enough to be sure the candidate was on track with their decision making. For example, one manager who gave a participant some authority with check holds and discretionary points for certificates of deposit allowed the candidate

to make the decisions, “but kept a good look” on whether the candidate was too lenient or hard and made sure the candidate was doing the right thing at the right time for the customer. The biggest learning opportunity the managers could provide was cited by the participants as the chance to shadow the existing assistant branch manager. Being able to see first hand the details that a program may not entirely capture was invaluable. Shadowing allowed the candidates to learn the nuances of how to be an assistant manager, such as how they scheduled their day, tracked the progress of their employees, managed the internal branch audit, and led staff meetings. These types of tasks were what took the candidate from being a great transaction person to a manager of others.

When a candidate was unable to learn how to manage from the host manager, this missed opportunity was summed up by respondents as “a big letdown” and “an injustice.” There was a dual implication of not learning the management function. First, the candidate graduated unprepared for the assistant manager role. Second, this was then compounded by them having to explain to employees and peers once they were assistant managers that yes, they did go through PREP training, and no, they don’t know how to do the job they were hired to do. The host manager is the critical link in developing not only the skills but the change in mindset that is necessary for management.

Many candidates suffered at the hands of poor management and thus were not prepared for their management positions. This happened for a number of reasons including: When the host manager had the attitude of: “You’ll learn this stuff by repetition, there’s nothing to really learn here, go open a new account.” It also happened when they were sent to a branch for their internship which had managers who were the only lenders. In these cases, the candidates were exposed to an inadequate learning model

of management, which was to individually produce and ignore your staff. In recounting occurrences of when the candidates had a poor management learning experience, a surprising, typical comment was: “I may be the only one who had that experience, I don’t know.” It was interesting that many candidates thought they were the only ones who graduated from the program not knowing how to schedule their employees, reward good behavior, where to find the resources for giving rewards, how to staff a financial center, pass an audit, write employees up, and keep their staff motivated and happy. Candidates often left the program without knowing how to take up these management duties.

Financial Center Staff

Two major themes emerged that explained why certain branch employees were motivated to either support or not support the PREP candidates: (1) If there was a personal incentive for the employee to teach, and (2) if they felt resentment of the candidate.

Incentive to teach. The host manager may have told one of her staff members to train a candidate on a function, but this did not guarantee that the employee would actually follow through with the request. Because of the amount of latitude and independence that most new accounts and lending representatives had, there was a lot of variation in the type of training the PREP candidate received. For example, several participants reported being assigned to learn how to process loans but never being given access to loan files by the lending representative. Or, the candidate was allowed to help process the paperwork, but was never allowed by the employee to sit in on an actual appointment where a loan application was taken from a customer. The PREP candidates were viewed by these representatives as taking time away from their business and

therefore did as little as possible to contribute to their learning process. One respondent recalled: “The new accounts representative I learned from had no incentive [to help me]. They cared about production, not how to make me a great manager; they didn’t have a vested interest in that, they all had their own work to do.”

Determinants of behavior that explain why a host employee took the time to train a candidate can also be attributed to a branch culture in which the norms are to teach others and/or to structural factors. Although they don’t exist in isolation from culture and structure, agentic motivators became apparent to the candidates as they started to discern who would help them and who would not. For example, one respondent said he got great training in his consumer loans phase because the lending representative was trying to get promoted into management and saw training the candidate as his leadership opportunity. Perceived incentives for the branch employee doing the training influenced the depth of training to which the candidate had access.

American Idol syndrome. On the popular television show, American Idol, winners of this national singing competition are propelled to instant fame. Critics of this show feel there is no credibility to the selection of these instant pop stars; the real authenticity belongs to the musician who pays their dues for years, plays the club circuits, and deals with the ups and downs of the industry. A similar sentiment was found regarding the PREP program candidates. Many candidates were met with resistance by the branch employees because they resented the management fast track the candidates were on. In reference to some assistant managers a respondent worked with during a branch placement, it was recalled that:

For the most part they said they were happy to have me here. They *said* that, but their actions didn't reflect that. Especially from the assistant managers because that was the goal of the PREP program to put me into an assistant manager position....I got an 'I'm too busy for this, you're going to have to learn the way I learned attitude' from a lot of them. And it took me a while to break through that and I think eventually I did when they saw that I wasn't there to step on their toes. But it was difficult. I really had to turn on my charm to get them to help me.

These assistant managers wanted the PREP candidate to have to go through and pay their dues for the length of time they did to get to where they were.

Then, there were the branch employees who were denied admittance into the PREP program. One respondent pointed out that she didn't feel that anyone was "particularly hostile." It was more a matter of offhand comments such as "How did you get so lucky?" or subtleties in behavior as described by one participant: "You could tell in their demeanor they felt they were more deserving or didn't appreciate the fact they were getting passed up so quickly when we have same goal."

Mentors

Other individuals whose actions impacted the success of the candidates were the mentors the candidates were assigned to. Each regionally run PREP program had a customized way of determining the mentors; some were the PREP candidates in the class ahead of the incoming candidates, others were employees of the host branches. The successes of these mentoring relationships often came down to the individual actions taken by the mentors. Certain groups of mentors worked together and arranged for the

PREP classes to meet. During these meetings, the candidates were given a forum to talk about their successes and issues they were having in the financial centers. The mentors offered advice and trained them on essentials of succeeding in the PREP program, such as how to schedule training, look up various reports on the computer, and handle issues with their host managers. While certain mentors checked in with the candidates daily, there were others that communicated infrequently with the candidates. As mentors, it became difficult for some of the recent PREP graduates to take on both the responsibilities of a new job and the mentoring of a new candidate. In addition to their work load, there were two other factors that broke apart mentoring relationships: when the mentor was just too far away and unable to compensate for the distance, and when there was too great a personality difference between the candidate and the mentor.

Mentors were also strategic allies in the development process. As previously discussed, displeasing one manager was to risk upsetting their other manager friends in the region. One participant recognized this and instead of confronting his host manager and telling him that he was not getting the training he needed, the participant had his mentor email the manager to check in and make sure that the participant was on track with what he had been sent to that branch to learn. Using assistance from the mentor in this situation worked for the participant as the host manager subsequently initiated contact with the candidate to plan out ways for the candidate to get the learning resources he needed.

Having a specific mentor assigned to the candidate in the host branch was cited as a factor that helped the candidate to assimilate into the PREP program. Having experienced many types of training in PREP, one candidate reported that he “learned the

most with his sleeves rolled up with his mentor in the financial center.” Not only did this allow the candidates to learn the processes first hand, but having someone specific in the branch to rely on enabled them to make connections between concepts learned in class and application in the financial center. The best mentors were those who were both knowledgeable about the bank products and procedures and had the ability to teach someone else about them. It was also helpful to have a mentor who was well connected in the branch and especially outside the branch in the region; exemplifying again that anyone or anything that exposed the candidates to the bigger picture areas outside of the branch was as a critical component of their overall development.

PREP Managers

Individual actions by the PREP managers were influential on the candidates’ development. There were certain characteristics PREP managers had that were valued by the participant, such as approachability. Many of the PREP managers were at a high level of responsibility within the company and the fact that they considered PREP to be one of the special parts of their management duties was important to the candidates. While not a complete deal breaker, a manager who had experience in the financial centers was reported as being easier to relate to in the sense that they understood the nuances of what the candidates were going through. The best PREP managers were also those who were tuned into the direction of the company, knowledgeable, and organized; these characteristics helped the candidates to clearly understand where and who their resources were.

From the perspective of the participants, the interactions between them and the PREP managers also had an impact. Having their manager check in with them frequently was greatly appreciated, and as one respondent told it:

Our manager touched base with us even if it was just to talk to say where are you at, how are you doing. You didn't just feel like you were a lost soul and you didn't have anyone to go to. You really did have a go-to person outside the host branch. I always felt like they cared. Their goal was to get us through and get us placed, not just because they were in charge and that's what they had to do. I felt they had a buy-in and wanted to see us succeed.

Having an open door policy enabled the candidates to be honest with their PREP manager about what was going on in the branches. This type of support provided a source of comfort for the participants. Several different managers were also lauded for having addressed each person in the PREP cohort in an individualized manner. According to one respondent, their manager "gave everyone their own personal attention in the way they needed it, she did not treat us all the same."

Supporting the growth of both the individual and the cohort was something that the better PREP managers did. In addition to guiding the candidates through the basic structure of the PREP program, several managers focused on developing long term skills within the candidates. For example, many had requirements of the candidates giving presentations to the existing regional managers and branch managers about issues current to the bank. Other areas the participants were encouraged to participate in were grand openings for different bank branches and community events. One participant credits these

extra assignments as something that prepared her to be a better assistant manager: “Doing all the research and presentations helps me now with staff meetings and volunteering at the regional level.”

The growth of the PREP cohort as a group was also facilitated by the PREP managers. Numerous managers structured time for the group to bond, such as taking advantage of big events like the national PREP meeting to get the group together. Meeting together on a regular basis through formal meetings or conference calls was important. Many managers used the formal meeting time to focus on team building, fun afternoon activities or for going out for dinner or drinks as a group. Facilitating these activities was especially critical because the individuals in the cohorts were located so far apart. The participants who benefited from these activities reported that “Even though we did not see each other every day, we felt connected” and “We looked at each other as a team.”

Just as feedback from the host managers was appreciated, feedback and expectations of the PREP manager were equally valued. Certain managers were known for having extremely high expectations and the candidates appreciated that and worked hard to live up to them. However, expectations of the PREP manager were only effective if they were clear so the participants knew their focus. Frustration ensued when candidates were given false pep talks and the direction to “do something great.” While wanting to be successful and prove themselves, vague instructions such as this left the candidates unsure about how to proceed, as described by one respondent:

You go to the 14 day [training] class and then they throw you into a branch with unclear expectations and they tell you if you want to get a job

at the end of the PREP program you have to do something outstanding. Last year's candidates did this and this which was outstanding so if you want to get a position at the end of this program, you need to do something that is above and beyond what everyone else is doing. But yet, you've had the same amount of training as a brand new employee. So you have to go into a branch that you don't technically work at and do something completely outstanding that wows the manager and hopefully the regional without getting fired, screwing something up and you don't even know what you're doing so you don't even know what would be considered outstanding. Like with our consumer lending phase, they said you need to go out there and do an amazing number of consumer loans. Well, what's an amazing number? Quantify it for us so we know what the expectation is; and they never did.

Good PREP managers also took action when necessary on behalf of their candidates. This made the participants feel they had someone looking out for them and "it was helpful to have that one person that could defend you and get everything you needed if you weren't getting everything you needed at the time." These managers were willing to communicate with the host managers on behalf of the candidates when, for example, the candidates were being misused as glorified tellers for an entire lending phase; or the PREP manager would move the candidate to an entirely new branch.

Finally, the ability of the PREP manager to excel in placing the candidates in ideal host branches often came from having a good working relationship with the various regional managers in their area. Having this relationship on an individual basis illustrates

the importance of individual actions in shaping the experience that candidates had with the program. The PREP cohorts truly benefited from the networking and relationships their PREP manager had established for themselves within the company. But as previously mentioned, these actions occurred in interaction with the structural and cultural factors that shape The Bank's PREP program.

Developmental Outcomes

Structural, cultural and agentive factors allowed the candidates to make changes in both their individual traits as well as the in way they work. Reflecting back on the cumulative view of their PREP experiences, the participants were very clear about what they gained and how they changed as a result of going through the program. The first, most obvious area of growth was their knowledge base of the technical and new managerial skills necessary for the assistant manager job. Some respondents emphasized that technical knowledge enabled them to better relate to their employees: "As a manager, I know what my new accounts representative is thinking because I've been in their shoes." In addition to these fundamentals, the participants reported gaining unexpected knowledge in key areas: "I went from thinking I knew what I was doing to having a very strong sense of the bank's direction." Added to their inventory of expertise was an understanding of the banking industry: "Banking is a whole different beast from retail in knowing how to attract business and what business makes the most sense in making money for the bank."

The knowledge base the participants gained served as the grounds for the second area in which they grew: Confidence. Knowing how to do their job gave the participants a great deal of assurance. However, the program also gave many candidates the

confidence to be secure with the unknown. Due to industry regulations, policy updates are thrown daily at bank managers and it is almost impossible for them to know everything at all times. The PREP program prepared them to deal with this overwhelming uncertainty. This readying happened when the participants became adept at using the resources available to them (i.e. help desk, policy manuals) to find the answers they needed. Increased confidence also served the candidates in their pursuit of their development goals:

I became very good at getting people to buy my worth; that was a lot easier after PREP. The more time I had to spend convincing someone that I would bring value to their branch the less time I could spend learning what I had to be doing there.

Confidence in their careers was also attributed to the program: “PREP gives you confidence to think you can move around different bank divisions and back to regional management.”

Several other characteristics discussed by respondents were mentioned as contributing to their success in the program. One of them was gaining humility:

The whole experience humbled me. When I first started the process I really thought that this would be a piece of cake and I would have no problem with it. But going through the motions and seeing what an assistant manager and manager do every day, I realized wow, these guys have got a lot on their plates and it was really cool because I gained a lot of respect for not only the manager but the assistant manager because the assistant manager gets the brunt of it. So it was humbling to see what they

do and wow, I've got a lot of respect for you and congratulations for the job that you do every day.

A maturing process also happened for many: "At the end I was able to fit my personality into a management role. Before I didn't have that sense of seriousness and the overall commitment it really was." In describing their maturity development, some respondents factored in age as an influence:

I was young when I started, around 20. I became less a buddy and more someone who could not only be supportive and have a relationship with individuals they work with, but understand what the differences were between being a peer and being a manager.

Closely related to the maturing process was a general sense of growth and self-reflection: "I learned what I could handle and what I couldn't. I grew in being able to make it through despite my frustration level and not thinking I was going to make it." This growth also took the candidates out of their comfort zones which several clung to in the beginning and had no need for by the end.

Getting over fears was also a change credited to the PREP experience. Some fears were specific such as conquering a fear of public speaking. Others related a general sense of fear in dealing with branch life:

Before when a customer said I want to talk to a manager, honestly, my heart would start beating hard because this person is going to be upset. I'm not going to be able to tell them why we are holding the check, or I'm going to be afraid because the person is yelling. I'm going to put my job on the line and sign on this check just to get rid of this guy – which battle

am I going to pick? Honestly, you might laugh, but it turned me into a man.

The ultimate change described by the participants was the final leap into their management role. The lingering question around this was: Ultimately, how did the candidates feel about the PREP program's ability to prepare them for this transition? There was one report of: "I enjoyed the program, but I don't feel like I got a lot out of it" which came from a respondent who was an internal hire who had a great deal of knowledge about The Bank to begin with. However, the majority of the viewpoints largely credited PREP with where they are today. The program experience was described as "amazing," "the best thing I have done for my banking career, and "I would not have gone to President's Circle³ [award for top producing managers] if it hadn't been for PREP." Despite the imperfections of any development program, the significance of the collective responses suggest that the resources devoted by The Bank to the PREP program were perceived as worthwhile by those who were developed, and achieved the ever desired goal of organizations: Return on investment.

³ Name of the award program is a pseudonym to protect the agreement of confidentiality.

CHAPTER V

Conclusions

The concept of job rotation has been around for decades, however, past research on job rotation has not been sufficient for answering questions organizations have today about how to develop their managers quickly. The significance of this research is that it offers a current perspective on job rotation: A means of accelerating the development of high potential employees in order to build a strong management bench. To date, no study has looked at this type of job rotation, management development program with the same level of detail, analytical framework, or from the perspective of the actual participants. This study addresses the research gap by providing a close examination of one job rotation program. Using grounded theory, this qualitative research has exposed The Bank employees' experiences in this program. This chapter provides an analysis of the findings, implications for practice, and recommendations for future research.

Summary of Findings

Structural, cultural, and agentive factors. The experiences and ultimate preparation of the participants in this study and their ability to assume management positions upon graduation were the result of structural, cultural and agentive factors. These factors are outlined in Table 2.

Table 2

Structural, Cultural, and Agentive Factors Reported as Impacting Program Experiences

Structural Factors: Construction of the organization (i.e., policies and procedures)	Cultural Factors: Beliefs, ideologies, and norms of a group	Agentive Factors: Actions and behaviors of individuals
<ul style="list-style-type: none"> • Organization of the program orientation • General program structure (rotation schedule, program length, transitory nature) • Host financial center selection process • Process of managing the PREP program • Classroom training • Financial center training • Alternative learning experiences formally or informally built into the program • Procedure for placing out of the program • Structural limitations to development of management skills 	<ul style="list-style-type: none"> • Corporate culture • Culture of the PREP cohorts • Host financial center cultures • Regional cultures 	<ul style="list-style-type: none"> • PREP candidate's personal qualities or characteristics • Host manager's characteristics or dispositions • Decisions of financial center employees to embrace or reject PREP candidates • Mentor's characteristics • Prep manager's characteristics and actions

Relationships among structure, culture, and agency. Structure, culture, and agency helped frame the investigation, but it was in the analysis and engagement in grounded theory that interactions among them emerged. These interactions generated complex relationships, creating consequences for the experiences of the participants and their successful development as managers. To illustrate, it is not enough to look at ideal job rotation *structures* without taking into account how the individual *cultures* of the host sites impact a participant's ability to transition successfully from site to site. It is also insufficient to solely consider *agentive* factors such as ideal qualities of employees when hiring for a program; an individual may have model skills and characteristics, but organizational policies and covert cultural norms can limit the participant's ability to act, often resulting in a failure to achieve performance standards. While multiple relationships

may be endlessly explored, ten of the most influential and frequently mentioned relationships that occurred between structure, culture, and agency and that generated a theoretical understanding of the experiences and outcomes of participants are presented in Figures 2 through 11.

Figure 2

Key relationship 1: Program structures created a supportive PREP culture which sustained participation.

The PREP cohort culture was facilitated by program structures in two ways. First, the program orientation brought the group together and facilitated introductions and the development of relationships amongst the group. Second, formal PREP meetings and classroom training afforded candidates opportunities to interact which furthered the personal ties. These opportunities were important to participants who frequently cited that having a good relationship with other candidates who could relate to their experiences became an integral source of support and encouraged them to take the actions that would keep them going throughout the program.

The annual, national PREP meetings gave participants a sense of importance as they were able to meet other candidates from across the country as well as high ranking bank executives. This, coupled with the fraternity- or sorority-type bond generated from

these structured interactional opportunities, resulted in a huge source of pride for participants which sustained participant participation in the program.

Figure 3

Key relationship 2: Successful execution of program structures was contingent on host branch cultures and employee actions.

When the structural procedures of the PREP program were properly executed, the program was designed to be inclusive for the participants by orienting them into the program, having explicit learning goals in place, providing them with mentors, exposing them to many different management styles, setting the participants up to learn from the best and enabling them to learn in sites that specialized in the products or services that were the focus of each rotation. However, the success of the policies and procedures were contingent upon the culture of the financial center and the actions of its employees. The culture of the financial center either supported or did not support the participant's development during his or her job rotation. Further, on-the-job learning depended on the branch employees having a perceived incentive to teach the participants. The incentives were cultural (the employees wanted to stay within the cultural norms which supported

the participant's development) and/or personal (the employees viewed the development of the participant as a chance to showcase their own leadership skills in hopes of promotion or wishes to work for the participant upon graduation).

Successful participants were those who were able to develop strategies to influence employees to teach them, including: (1) working hard to alleviate the staff work load so the employee had the time to teach the participant, (2) eliminating perceptions about competition upon arrival by immediately having a conversation with the employees to clear up any misperceptions that the participants were going to take business away from the current employees, (3) proving themselves as a team player who cared about the goals of the branch and were not just there to temporarily take up the time of the staff, and (4) being gracious and not irritating the staff by coming across as a know-it-all or announcing: "This is how it was done in the other branch." The knowledge of and ability to use these strategies constructed specific behaviors of the participants that had implications as to how much they were able to learn on the job during the program.

Figure 4

Key relationship 3: Host branch structures and cultures could undermine program goals.

When host managers failed to explain the PREP program to their staff or lacked the policies and procedures to support the candidate and to define the role of the staff in the development process, it was left up to the candidates to clarify their role to the

employees. Further, the lack of structure often led to the development of host branch norms which ensured the participants knew they were trainees. This undermined the goals of the program as the development process became more of an initiation process.

Figure 5

Key relationship 4: Short-term solutions jeopardized program goals.

Often, participants were placed in branches that were understaffed in order to help alleviate the branch workload. Candidates were sent to a location under the guise of learning a particular phase, but in reality they were sent to work as a type of temporary employee. This culture of quick-fix, short-term thinking often led to shortcuts in candidate placement which forced participants to compensate for what they were not learning in their assignments. These shortcuts in participant placement superseded the intended development structures, jeopardizing the long range development goals of the program and the quality of the managers developed.

Figure 6

Key relationship 5: The role of authority-in-training brought about unique challenges.

The participant role structured by the program was that of authority-in-training. Working in this in-between place of not yet being in management, but removed from the general staff was challenging. It was difficult to become completely integrated into any given group (i.e., loan representatives, assistant managers) because lines of friendship with employees had to be constantly negotiated. Knowing the participants were soon going to be in management, but were not yet, constrained the actions of the branch employees and influenced their interaction with them. Regardless of whether the branch culture supported or challenged the participants, candidates felt a great deal of pressure from having to make mistakes while learning in front of the employees they would soon be managing. Being the outsider, by virtue of their role, generated feelings of social isolation and anomie among the candidates, which ultimately influenced the actions they took in the program.

Figure 7

Key relationship 6: Participant characteristics could obstruct the development process.

The program allowed discretionary amounts of authority to be given to the participants during the program. In this case, while the structure supported flexibility, the end result, i.e. successful development into a manager, relied on the participants' ability to take up the authority. When the participant lacked the skills, experience or confidence, they were less able to engage in the learning.

Figure 8

Key relationship 7: Structural limitations on the participants' ability to engage in management duties only allowed participants to develop to a certain point.

While some discretionary authority was allowed, in general, the role of manager-in-training dictated that participants did not have full access to all aspects of the job of manager, i.e. employee reviews, correcting employee performance, giving out rewards, etc. In this case, individuals were constrained by the structure in place. Because individuals learn by doing, the program only prepared many candidates up to a certain point. The requisite skills had to be learned on the job once they graduated into management. This was problematic for the participants because they were often on their own once hired into a management role and did not have someone specific from whom to continue to learn.

Figure 9

Key relationship 8: Bank structures created a culture that silenced participants.

Individual bank branches were grouped into regions of about 18-22 branches per region; each branch manager in the region reporting to one regional manager. While this format was good for morale and business objectives, there were unintended consequences of the bonds between managers. Participants were cognizant of relationships between branch managers in the various regions and were careful not to say anything that would cast them as someone who couldn't handle the experience. Despite the channels in place for participants to report issues, they often opted to remain silent and tried to work issues out on their own. The implication of this is the structural protocols put in place for participants to report problems were not used, leaving program managers unaware of issues that needed to be managed.

Figure 10

Key relationship 9: Proving oneself in the program had to be done with caution.

Several participants cited one of the expectations structured into the program was for participants to prove themselves as competent, successful employees. However, going above and beyond their goals was often a source of conflict for the participants because not every host employee provided a supportive culture for the participants. Many participants were met with resistance by the branch employees because they resented the management fast track the participants were on, and felt the participants needed to pay their dues for the same length of time they did. The act of succeeding and proving themselves in their role caused the participants to risk alienating the very employees they were relying on to teach them the skills they needed for development. Participants needing to take guarded actions to manage their relationship with branch employees suggest that program managers are sometimes given an incomplete sense of what participants can really do.

Figure 11

Key relationship 10: Structural and cultural aspects of the program contributed to participants' personal and professional growth.

The transitory structure of the PREP program, while necessary to accelerate the training of participants, created a culture that brought stress as the participants lived in a constant state of worrying that they would not be considered an expert in any particular area. The “imposter syndrome” plagued them as they continued to feel they were under the microscope of employees, managers, and peers, otherwise referred to as living in a fishbowl. The constant transitions also required participants to acclimate to each branch as they were all culturally unique, imbued with their own set of ideologies and beliefs about the program, the candidates and their role in relationship to the candidates. This combination of structures and culture caused the participants to feel the need to use a “fake it until you make it” approach. Overall, as challenging as these aspects of the program were, participants cited that these trials furthered their personal and professional development, specifically in the areas of: Knowledge, confidence, humility, maturity, ability to get people to buy their worth, and conquering of fears.

Implications for Practice

Results from this study suggest that the use of structure, culture, and agency as an analytical framework provides a comprehensive understanding of the factors that influenced the development of managers in this job rotation program. What was notable, however, was that these factors did not exist in isolation, and if we are to maximize the value of these types of programs, careful attention must be paid to the interactions that impede and support program objectives.

The results of this study are also heuristic for The Bank and others trying to understand organizations and employee development. Further, this study contributes to the literature on structure, culture, and agency. The addition of the employee perspective on rotation programs yields new understandings about ways this framework contributes to our understanding of personnel development.

Recommendations for Future Research

As significant as the contributions are from this study, understanding of the effectiveness of the PREP program at The Bank may be developed further. The first recommendation is to include current program participants in such a study in addition to alumni because retrospective views can alter the reporting of experiences. Second, a comprehensive, real time investigation would uncover further factors that influence development. This would involve expanding interviews to include perspectives of other program stakeholders: PREP managers, host managers, regional managers, host staff, program drop-outs, and employees who were denied admittance into the program. Third, these findings could be augmented with the broader PREP alumni population through a survey constructed by the responses given in this study. Fourth, the theoretical framework

generated from this study might be helpful in investigating other management development programs.

Finally, expansion of this research to other types of organizations, both in and outside of the financial services sector, would help us understand how different organizational sizes and cultures affect the experiences of participants in job rotation, management development programs. If we are to address the current deficit in management bench strength across organizations, it is incumbent that we better understand how to develop individuals while observing the structural, cultural, and agentive factors that influence the process.

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APPENDIX A
Consent Form

Informed Consent to Participate in a Research Study

Paige Creager, a doctoral student in the Leadership Studies program in the School of Leadership and Education Sciences at the University of San Diego, is conducting research on the experiences of managers who have participated in a management development program that utilizes job rotation. If you agree to participate in the study, the following arrangements and conditions will apply:

1. You will be interviewed between 60 to 120 minutes. If a follow-up interview is needed so you can clarify or expand upon ideas discussed in the initial interview, it will last no longer than 120 minutes.
2. You will be given a brief background and overview of the study. The researcher will explain the interview process and ensure you have an understanding of your rights as a participant in the study.
3. The interview will be conducted at a location that is acceptable to you, in order that you will not be distracted from your current work responsibilities.
4. Interviews will be recorded and transcribed. Since the topic will be more professional than personal, it is unlikely that the contents of the interview will cause any significant discomfort. If it does, however, you will not be expected to respond to any question that you find problematic or bothersome.
5. Efforts will be undertaken to ensure confidentiality. These efforts include: keeping data in a locked cabinet or password protected file on the computer until it is destroyed five years after the completion of the study, using pseudonyms, and giving you an opportunity to review and edit your interview transcript.
6. Information from this study will contribute to knowledge in the field of management and leadership development.
7. Participation in this study is voluntary. You may withdraw from the study at anytime. Withdrawal from the study will not affect your employee status. Data collected prior to your withdrawal will not be used unless you agree in writing to let these data be used in a class paper and presentations and, possibly, in other additional publications or presentations emerging from this study.
8. If you have any questions about this study or activities that occur during the course of this study, you may contact Paige Creager at (619)435-6120, paige-06@san Diego.edu or Dr. Lea Hubbard at (619)260-7818, lhubbard@san Diego.edu.
9. There is no agreement written or verbal, beyond that which is expressed on this consent form.

I, the undersigned, understand the above conditions and give my consent to my voluntary participation in the research that has been described.

Signature of Participant

Date

Printed Name of Participant

Signature of Principal Researcher

Date

APPENDIX B

Introductory Email

To: PREP graduates
From: PREP manager
Date: September 1, 2006
RE: PREP Program Study

Dear PREP graduates:

I'd like to introduce a very unique opportunity for you to take part in a study on the PREP program.

Paige Creager, a former The Bank Leadership & Sales Training Supervisor, is currently working on a Ph.D. in Leadership Studies at the University of San Diego. She is partnering with The Bank for her dissertation (thesis) of which the goal is to interview PREP graduates to understand your experiences during the PREP program.

The Bank legal department has approved this study and your participation is completely voluntary and confidential. In order to participate, you will contact Paige directly. No one at The Bank, including myself, will ever know if you have inquired about, or participated in the study. Pseudonyms will be used for both the company and individual participants.

I encourage you to participate because this is a chance to help other leaders that go through the program as this study will bring value and depth to the program in the future.

I have attached a letter from Paige further explaining the details of your participation. **Please note that if you are interested in being interviewed, you will need to contact Paige by September 15th.**

Thank you,
XXXXXX

APPENDIX C
Letter from Researcher

Hello PREP alumni!

Thank you for considering participating in this study of the PREP program. I am a former The Bank employee, having worked as a Leadership, Sales, and HIP training supervisor for the Oregon, SW & Eastern Washington group and as a sales trainer for the Southern Coast/Inland Empire group.

This is a great opportunity for you to share your story as you have a wealth of information to offer. Uncovering your experiences will allow management training programs to be better understood and improved.

Here are some points you are most likely wondering about:

Interview Process

- Interviews will take place in person or over the phone; whichever is most convenient for you, or is possible given geographical distances.
- There will be two interviews. The initial interview will gather most of the information and the second will allow me to follow-up in order to have certain points clarified or expanded upon.

Research Questions

The overall questions I am looking to answer in our interviews are:

- 1) What was your experience like in the PREP program?
- 2) What factors did you perceive as facilitating or constraining your ability to assimilate into, and be successful, within your program?
- 3) What factors from the program experience do you feel contributed most to your succeeding in the job for which you were being prepared? What factors were missing from the experience that would have been helpful?

Confidentiality

Your information is completely confidential. Your identity is protected through the use of a pseudonym that I will assign to you after you decide to participate. By contacting me directly to sign up, no one at The Bank will ever know that you have either inquired about the study or have participated.

Please make sure to contact me by September 15th to sign up! I look forward to hearing from you and learning more about your experience in the PREP program. Please call or email at any time with questions at (619) 435-6120 or paigecreager@gmail.com.

Sincerely,

Paige Creager

APPENDIX D
Demographic Collection Email

Dear (Name),

Thank you for considering participating in this study. The next step is to let me know a few pieces of information about you. I will use this information to select individuals to participate in this study so that the research sample is as diverse as possible. Please be assured that this, along with everything else discussed during the interview process, is entirely confidential. This information is extremely important for me to know because it ensures that the widest variety of experiences is captured in the study:

1. Were you an external hire into the PREP program or were you already employed with The Bank?
2. What was your date of graduation?
3. Where were you located during the program?
4. What is your age?
5. What is your race?
6. What is your gender?

Thank you,

Paige

APPENDIX E

Interview Guide

Opening Questions

1. Tell me about why you decided to apply and go through the PREP program.
2. From what you remember, tell me about the order of events of your program experience from start to end.
 - a. What was the order of your rotations? What did you learn and when?
 - b. How long did you spend in each branch/phase?
 - c. What was the length of your entire program?
 - d. What was your first job out of the program? What is your current job?

Structure, Culture, and Agency

3. Thinking back to when you first started the program, how long, if ever, did it take you to feel totally comfortable as a PREP employee? What helped? What hindered?
4. What kinds of things helped you to be successful during the program? Were there people? Policies? Something you did?
5. What kinds of things tended to get in the way of your feeling like you were able to do well during the program? Again, people? Policies? Something related to you?
6. You had to keep starting these new jobs, what was that like for you?
7. How did people react to you?
8. As you rotated from branch to branch did you ever find that lingering perceptions that people had about past PREP employees affected the way you were treated, either positively or negatively?
9. What helped you the most in making a new transition?
10. Did you change your approach to your new rotations based on your learning and experiences from previous rotations? How?
11. For the next question, I want to define the word culture for you so that I can be sure we are talking about the same thing. Culture is the collective attitudes, beliefs and norms of a group. What is the culture of this company and how does it support or hinder your process?
12. How did you learn the rules/norms/culture of each group you temporarily belonged to (individual financial centers and PREP group)?
13. During the PREP program, you would spend time in the different financial centers learning about different functions. During this time, you were not in management, but it was known to those around you that you were going to be in management in the near future, and potentially the boss of some of the people that trained you in the branch. Meaning, you didn't exercise authority (i.e. enforce rules) in any way, but you were an authority figure in training. This creates a very unique situation. Tell me what that was like for you.
14. In every relationship dimension of power affects what you say and do. In what ways did you experience this and how did it play out or influence your interactions? Were there things you could or couldn't get away with because you were in PREP?

15. During the program, you were part of a cohort, meaning, you were part of a training group that started and graduated at the same time. What was the experience like of being a member of this group, but not interacting with that group on a daily basis?
16. How do you feel you changed from the beginning of the program to the end?

Factors that best prepared participants for job as assistant manager

17. What helped or hindered your transition into your new role as an assistant manager?
18. Now that you have been in management for a good period of time, what do you think are the aspects of the PREP program that best prepared you for what you do now?
19. Looking back, what was not included in the program that would have been helpful? Are there things that you are expected to do now as a manager that you didn't learn along the way?
20. If you could design the program yourself, what would be your recommendations?

General catch-all

21. Related to what we have been talking about today, what did I not ask you about that you would like to bring up?

To address study limitations

22. Why did you decide to participate in this study?
23. Why do you suppose some people did not decide to participate?