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Abstract

Case study evidence and leadership theory are used to illustrate a new approach to developing leadership capability in the middle of organisations. Outcomes from theory and practice challenge prevailing assumptions about the contribution of middle managers to strategic thinking and organisational performance.

Impact evaluation stories were generated and collated by middle managers on a development programme called '**Leading the Way**'. Further qualitative evidence, drawn from a range of organisational stakeholders, indicates that mid level managers and professionals are key to strategic and operational change.

In practice, middle managers have the ability to operate as organisational strategists, change agents and innovators. In their unique position, they are closer to the values and culture of their organisations. Their collective knowledge translates into social, intellectual and political value, making their role vital in sustaining service quality, especially during change.

Key words: Middle managers, strategy, and organisational change

Introduction: A New Landscape For Middle Managers

Current economic, social and political pressures in UK Housing Associations present an ideal opportunity to rethink attitudes towards middle managers. The austerity measures imposed by the UK government continue to impact the quality of public services and bring fresh challenges for those engaged in front line service. The demand for services, however, is increasing both in scale and complexity of need. Housing organisations are turning to alternative sources of income to supplement their funding from central government. Professionals in these organisations are culturally suspicious of profit motives and, yet, find themselves in an increasingly commercial scenario.

In the case study, the mission of housing provision had shaped individual behaviour and cultural norms. A collective passion, to provide excellent service and care, frequently transcended individual priorities. Cultural norms of this quality are a major asset to an organisation and need to be preserved, despite external economic pressures. Middle managers are key to the preservation of the social mission because of their proximity to the cultural and operational realities. As funding cuts force tough decisions, people in the middle are ideally placed to lead others through change. Their leadership capability and confidence are vital to supporting the front line professionals to innovate and develop new approaches. To do this, professionals in the middle need to be more actively engaged in strategic formulation and given greater autonomy in operational decision-making.

In addition, new forms of integrated service provision are developing between not for profit, public and private sector providers. The result is a clear imperative for collaborative leadership between organisations and across professional groups. Collaborative service provision brings multiple stakeholders together and creates complex relationships, which are both informal and formal. Traditional forms of leadership do not provide the flexibility and adaptability needed to make people and organisations resilient to pressures of austerity.

This paper will argue that middle managers are the new organisational centre of gravity providing models of leadership more appropriate to delivering services in tight economic conditions.

Literature Review: Voices From The Middle

An initial review of literature revealed that negative perceptions of middle managers have prevailed for over twenty years:

'Most writers portray the middle manager as a frustrated, disillusioned individual caught in the middle of a hierarchy'

(Dopson and Stewart, 1994, pp. 55-78)

'Why are middle managers so unhappy? Stuck in the middle of everything'

(Zenger and Folkman, 2014, p. 1)

This insight prompted a more detailed historical discourse analysis between 1990-2015 to search for key themes and trends. A sample of the core themes is discussed in this section. The literature findings indicated that while the external challenges faced by middle managers have changed dramatically, the leadership issues they face remain the same. There were clear examples of flawed assumptions, at all levels of leadership, having a significant impact on the confidence and performance of middle managers (Thomas and Lindstead, 2002). There was, however, a wealth of evidence that middle managers are crucial to the quality of strategic formulation and operational performance.

Where do assumptions about middle managers come from?

The discourse analysis revealed that perceptions of middle managers were rarely reported from their perspective. The literature consistently provided insights into the assumptions and attitudes of senior leaders. In addition, there was a disturbing lean towards negative interpretations of middle managers' behavior. The positive constructions of middle managers were largely linked to their contribution to organisational vision, strategy and performance.

Literature findings demonstrated the need for leadership at all levels in service-orientated organisations. Front line professionals are frequently working with complex problems, which may not have a ‘right answer’ or an immediate solution. Traditional forms of leadership with their ‘relay’ system of communication where information is passed from level to another are not feasible in a fast paced service organisation.

External challenges and impact on middle managers

The context facing middle managers has dramatically changed. Their place in organisations has been variously downsized, restructured and re-engineered in response to external changes. Middle levels have consistently felt the impact of external crisis through structural changes sanctioned by senior leaders and this appears to have left a powerful legacy in the discourse. Despite the rhetoric of developing talent (Klagge, 1998), there is evidence of deeply entrenched perceptions of middle managers ‘being expendable’ in terms of cost and contribution.

An interesting discourse is ‘doing more with less’ which has dominated service organisations since the global economic crash in 2008. There appears to be little written about the voices of middle managers in response to this rhetoric. Instructions to middle managers continue to operate from a top down paradigm and reveal an interesting assumption that the strategic direction communicated by senior managers is the right way forward. Senior managers’ behaviours impact the capability and confidence of their middle managers. When their behaviour reflects a top down perception of leadership, middle managers become increasingly disengaged (Thomas and Lindstead, 2002).

Drucker (1988) argued that the key role of middle managers was as a section of a relay system within a hierarchy and believed middle managers were themselves part of the problem (they had become custodians of a relay system and further disempowered themselves as a result). These negative perceptions of middle managers have left a legacy, which lingers in management thinking and impacts organisational performance. Discourse themes such as ‘Destructive Dynamics of Middle

Management' (Meyer, 2006) and 'Middle Managers Self Interest' (Guth and MacMillan, 1986) have had a lasting effect.

The challenge delivered by Floyd and Wooldridge et al. (1994) to the top down relay communication system represented a significant shift in thinking about middle managers. This new model of middle managers provided a conceptual framework to explain the possibilities for middle manager engagement in developing a strategic response to change.

Change and the middle

The prevalence of a top down paradigm in both leadership theory and practice has brought lasting consequences for middle managers' decision-making, performance and morale (Ladkin, 2010; Tate, 2009). A top down leadership ethos impacts the quality of engagement and communication. Senior managers may assume that their communication efforts are successful and fail to access the valuable knowledge in the middle of the organisation:

'When it comes to envisioning and implementing change, middle managers stand in a unique organisational position'

(Huy, 2001, p. 74)

Not all writers agree with this analysis. Gratton (2011) has predicted the demise of middle managers and sees little future in a layer of management whose sole function is to monitor others. In contrast to this 'top down' analysis of middle managers, notice the early vision of Nonaka (1988) who advocated a 'middle-up-down' model of management to ensure the quickest response to changing market conditions. In his model, strategic formulation is seen as an iterative process, which integrates day-to-day operational knowledge.

The emergence of these contradictory role pressures is variously described as 'irreconcilable forces' (Stewart, 2002), and 'foot draggers and saboteurs' (Guth and Macmillan, 1986). Economic pressures and the consequences of austerity have since accelerated the need for proactive models of middle management. Balogun and

Johnson (2004) made a significant contribution to the theme of middle managers and change. Their work indicated that people operating in the middle have a capacity for sense making that is independent of their leaders. Rather than blindly following orders or faithfully passing messages in the relay system, middle managers are seen as capable of an intelligent assessment of strategic issues.

Role, image and identity

From the 1990's several authors draw attention to the negative image of middle management as 'frustrated, disillusioned and impotent' (Dopson and Stewart, 1994), 'without a voice' (Sims, 2003) and 'caught' (Stewart, 2002). The unfortunate consequence has been to further embed the image of middle managers as trapped in the middle. It is interesting to note the language used to describe middle managers' roles and image at the time; 'rock and hard place' and the focus on 'coping' with change.

'They get lost in the recurring re-organisations and pressure to over work'
(Thomas and Lindstead, 2002, pp. 71-93)

However, from 2005 onwards, there was an interesting shift in the understanding of empowerment as the development of social value for service users rather than a loosening of control systems.

Middle managers and strategic conversations

The term 'strategic conversation' has emerged to encapsulate the benefits of including middle managers in building organisational visions and ideologies, and contributing to organisational strategy (Westley, 1990; Liedtka and Rosenblum, 1996; Balogun, 2003).

The proximity of middle managers to the service operation provides crucial information for senior managers who are responsible for setting performance targets. Without a two-way conversation between levels of management, crucial practical knowledge is left out of strategic decisions.

The use of the term ‘divergent influence’ signals another fundamental challenge to traditional ‘top down’ leadership (Floyd and Wooldridge, 1997). Senior managers may have a predisposition for convergent behaviour, which means achieving goals and performance targets. Senior managers are primarily assessed and rewarded for compliance by external stakeholders. More junior levels may have knowledge or experience to present strategic alternatives or advise on operational issues especially when there are resource implications. In their unique position, middle managers are seen as competent to challenge strategic assumptions.

Middle managers as catalysts and innovators

From 1990’s literature, it was clear that Total Quality Management (Klagge, 1998) had made a major impact on middle managers that were now seen as key to promoting innovation and change. Middle managers were appointed as ‘change agents’ to facilitate the implementation of change. Change agents were trained to carry out their roles in a systematic way. Innovation was encouraged but only with senior management permission.

Dutton et al. (1997) concluded that there were favourable and unfavourable times for middle managers to ‘sell issues’ to seniors. On the surface, this appears good advice, but notice how ‘selling an issue’ still implies a hierarchy where the boss knows best. When middle managers produce evidence based strategic options, they deserve full attention from senior stakeholders irrespective of status.

Middle managers witness rare and unusual events and use their experience to manage them (Currie, 2006). Senior managers initially distrust this behaviour because it destabilizes reporting processes and external stakeholder expectations. Senior managers then appear resistant to new ideas and innovation. The divergent information that middle managers bring to meetings may appear to challenge the current strategy. Middle managers may seek and exploit ‘policy windows’ in an attempt to push forward an innovation that benefits service users (Ren, 2011). The disturbing insight from this work is the notion that senior managers and their agendas may corral the innovations of others. Attempts to innovate in the face of a ‘rare and unusual event’ will have to pass tests set by senior managers.

Writers between 2011-2013 conclude that for innovations to be implemented, middle managers need to be confident, capable and motivated to see through their ideas (Markan and Marken, 2012; Warhurst, 2012; Huy, 2011; Fomier, 2011; Ren and Guo, 2011). The contribution of middle managers to challenging the status quo is very important to organisational performance irrespective of whether innovation is on the agenda (Conway and Monks, 2011). In organisations where there is a history of traditional leadership, challenge from the middle is frequently seen as a risk.

Middle managers as organisational strategists

There are now strong arguments from strategy literature for middle managers to have a greater role in the development of strategy (Rouleau and Balogun, 2011; Balogun, 2006; Balogun and Johnson, 2004). Middle managers are described as champions, synthesisers, facilitators and implementers (Wooldridge, Schmidt and Floyd 2008). All these roles signal a redistribution of power between levels of management.

Finally, Balogun (2006) warns of unintended outcomes of strategic implementation if the 'sense making' of middle managers is not considered. Her work is key to understanding the voices of middle managers and their ability to understand complex issues, despite their apparent 'lesser' status.

Methodology: Developing The Middle

'Leadership is not simply the domain of the few, but is prevalent throughout the organisation, in the untapped talent of all its employees'.

(Alimo-Metcalfe and Alban-Metcalfe, 2008, page 33)

The operating environment for UK Housing Associations is changing rapidly for both middle and senior managers. They face demands to provide a full spectrum of services ranging from social to private rents, housing development, management and maintenance of properties and community engagement. As a result, housing professionals are now managing a dramatic and complex expansion of services and dealing with vulnerable individuals and families.

The relationship between local government, Housing Associations and their communities is also transforming and, again, this will have an effect on all levels of leadership. In this context, mid level leadership capability is crucial to developing an organisational culture that can adapt and manage political, economic and social challenges. The design and delivery of leadership development programmes need to be closely aligned with the operational conditions facing both middle and senior managers. A stratified approach to leadership development simply embeds outdated top down culture. A whole system approach to learning and development is essential to signal an important message about leadership at all levels.

Housing Association case study

Yorkshire Coast Homes (YCH) is a Housing Association, which owns and manages over 4,000 homes across the Borough of Scarborough. They are the largest provider of social housing in the area and face a complex and changing economic, social and political landscape. The complexity for YCH leaders is to provide clarity of purpose, focus on what matters, and respond to rapid change whilst keeping a strong hold on the ethos and values of the organisation.

In 2013, the senior leadership team at YCH developed a competency framework which mapped managerial effectiveness in five major areas: value led leadership, leading change and improvement, cultivating high performance, working partnerships and effective relationships and building on business growth. The document set out expectations of leadership behaviours and served as clear structure for a middle management development programme.

A systematic approach to developing middle managers

Our approach to developing YCH middle managers was informed by research conducted in the private sector (Ready and Conger, 2003). While the context of their research was private sector, the design concepts had significant resonance and value to leadership development within a sector facing a tough operating environment. The following three principles shaped the initial programme design and later evaluation:

- Shared ownership of leadership development across different stakeholders,
- Leadership development is regarded as a process not a product,
- Evaluation methods are designed to produce impact evidence.

In many UK Housing Associations, there is increased pressure to deliver sustainable service provision and improvement at reduced cost. This pressure drives poor decisions about leadership development. The flaws embedded in the design and procurement of leadership development is perpetuated in decisions about evaluation. Input evaluation measures are frequently used because they provide quick quantifiable information for key stakeholders. In the longer term, this is a weak approach, which delivers a superficial assessment of learning outcomes and little evidence of future potential or performance.

Case study evaluation

An output method of evaluation was used called Appreciative Inquiry (Cooperrider and Srivastava, 1987). Appreciative Inquiry encourages people to reflect on the tangible, practical outcomes of learning and develop plans for sustainability. The success stories generated during the evaluation process brought a clear focus to the ‘real world’ ideas and issues faced by the managers. The accounts of learning and subsequent experiences provided clear evidence of successful application of learning in the work place. The ownership of the impact evidence resides with the learners rather than senior managers or programme facilitators. The process of evaluation, therefore, sustains learning about leadership and promotes organisational development. Appreciative Inquiry provides another platform for middle managers to influence strategy, innovation and operational challenges.

Case study leadership programme

‘In a complex organisation it’s not possible for a few people at the top knowing how to do everything. Good leadership has to be inclusive, letting other people lead.’
(Middle manager, 2015)

The programme design was designed to the following criteria:

- Middle managers are ‘Change Intermediaries’ and in a prime position to enable operational change and ensure cultural alignment to strategic priorities,
- Middle managers are capable of interpreting strategic change for their staff,
- Middle managers help others make changes but focus on keeping the ‘business’ of the organisation going during transition,
- Middle managers are a strategic asset and need support to maximise their influence across the organisation.

A key element of the programme was a team business project focussed on a priority strategic issue. Teams were diverse with members from across the business and different levels of management. Senior managers actively worked with the teams as members and expected to contribute to the project work. Project findings, recommendations and learning outcomes were presented at a Learning Forum. To date, forty middle managers have completed ‘Leading the Way’ with another twenty managers scheduled to complete by December 2016. All project teams in 2014/ 2015 gained CEO sign off to implement their recommendations.

Findings: Housing Association Case Study

‘The programme gave us licence, to not only influence the whole company from admin assistant to board level, but to bring about real change’

(Middle manager, Leading The Way, 2015)

Output evaluation generated robust evidence that middle managers had applied their learning back at work. It was clear that middle managers were keen to develop their leadership and make a greater contribution to the development of services in the future. The evaluation approach encouraged a refreshing level of frankness between middle and senior managers about leadership within the business. The ‘Voices’ from the middle were listened to, and respected by a range of senior stakeholders including board members.

Trust

Trust was seen to be a fundamental factor in promoting the well being of staff and ensuring high performance. The participants concluded that mutual respect between individual leaders was a prerequisite for a collaborative culture and organisational resilience. Open and honest communication between all levels of leadership was seen as critical to the future performance of their organisation.

Team projects were welcomed as practical opportunity to apply learning to a more complex task and influence strategy. The complexity and changing nature of team projects (conducted in parallel with existing responsibilities) ensured practical learning about high performance teams. The reliance of team members on each other to deliver the project outcomes, on time and to a high standard, gave the group a unique insight into the power of trust and respect on motivation, performance and learning. With senior managers working alongside, the project teams experienced the power of trust in a high performing team.

Listening

'People want to be heard, they want you to listen'

'Everyone has an opinion and should be heard'

(Middle managers, 2015)

'Leading The Way' brought a greater awareness of both personal style and impact on others. Active Listening was seen as a crucial skill to enable a leader manager to understand the strengths and weaknesses of a team. An appreciation of personal influencing style enabled managers to be more aware of their impact on others. Listening, influencing and appreciating difference were all seen to help leaders delegate effectively. The combination of increased awareness and confidence appears to be linked to a greater acceptance of difference between individuals, in teams and across the business.

'I intend to involve the whole team in the change and lead by example'

(Middle manager, 2014)

Strategic thinking/critical reflections

Evaluation findings revealed the impact of reflection on the quality of strategic thinking. In addition, strategic thinking was no longer seen a responsibility of senior management but a skill that could be developed at every level. Time to reflect on leadership style was seen to be crucial to the future organisational performance. Reflection was seen from two major perspectives: learning from past experiences and learning for the future by creating an environment that supports creativity and innovation.

'No plate spinning - quality focus on producing a quality outcome'

(Middle manager, 2015)

Quality planning was seen as a positive outcome of reflecting and strategic thinking. The impact evidence, however, indicated a desire for planning processes that engaged a wider group of managers, at an earlier stage.

Teamwork

The impact evidence demonstrated a significant improvement in teamwork across the business. High performance teamwork was concluded as key to the future performance of the organisation. Team projects conducted during the programme were seen as a major catalyst in learning. There was practical evidence of participants applying their team skills in a practical way in the business.

'I want to support my team to bring more answers and solutions to me'

(Middle manager, 2015)

Collaboration

The major outcome about collaborative working was the realisation of the benefit of high quality engagement with staff. There was concrete evidence of more productive

meetings and improved communications between teams. A reduction in tension at cross-departmental meetings was reported.

'We can now see the ramifications for others when there is a 'quick' win for one team'

(Leading The Way' participant, 2015)

Organisational culture/ Leadership models

The evaluation outputs relating to culture and leadership proved that leadership attitudes and behaviours are a very powerful dynamic in this organisation. Participants discussed a vision of future leadership that was more collaborative, inclusive and inspirational. These criteria were seen as essential to a customer-focussed organisation where the culture supports and challenges both individual and team performance.

'A company of employees working in the business who feel empowered to make a real difference. They are highly motivated and feel supported'

(Leading The Way, 2014)

In summary, leadership behaviour amongst both middle and senior managers became more conscious and deliberate. Programme participants developed a shared experience of learning about leadership and were able to reflect and discuss issues from a strategic perspective. The project outcomes operated as a platform to influence both strategic direction and operational decisions.

Discussion: How Middle Managers Can Be Heard

The 'Voices' of middle managers are assumed to be a form of resistance to change. For senior managers, under intense external and political pressure, the voices from the middle appear to come from the past. In the case study, team projects were designed into 'Leading The Way' to create a mechanism where middle managers could share their ideas and views and in a constructive manner. The outcomes of their research

gave middle managers a new voice and new message. An old, more traditional, dynamic was challenged.

The scale of economic and social change for UK Housing Associations is a major opportunity for middle managers to demonstrate their capability. Innovative and cost effective responses to change can be promoted and facilitated in the operational relationship between the middle and the frontline. This cannot work unless there is a radical rethink of what leadership means to all levels in a service organisation.

Vital to organisational readiness for change is a high quality cycle of knowledge production and transfer. This means a speedy iteration of learning between different parts of the organisation. A new, more dynamic circulation of power will be deeply challenging, both for those who occupy a senior role and for those who expect the boss to do all the thinking. With a heroic model of leadership, there is a worrying compliance between the leader and their followers and the result is very little distribution of authority to frontline staff.

Overall, the case study findings concur with literature findings. The leadership capability in the middle of an organisation is untapped and frequently ignored. In conclusion, middle managers are capable of being intermediaries of change, active contributors to strategy and leaders of frontline performance.

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