The intertwined effect of HRM practices and transformational leadership on employees' attitudes in an M&A context: evidence from a collaborative and mixed-methods study

ABSTRACT

This mixed-methods study investigates transformational leadership in the context of a recent merger through a collaborative research project aimed at co-producing scientifically rigorous and practically relevant knowledge. Using qualitative and quantitative data, this study contributes to the growing stream of literature aimed at exploring how two key organisational levers, specifically leadership and HRM, impact the development of positive employees' attitudes, which is central to the success of any M&A process. In particular, this paper shows that in M&A contexts, HRM opportunity-enhancing practices (aimed at allowing employees to exercise their competencies and efforts in engaging with the organisation's decision-making processes) mediate the relationships between transformational leadership and both employees' job satisfaction and affective commitment. This suggests that organisations interested in developing employees' affective commitment and job satisfaction in merger and acquisition (M&A) contexts should complement transformational leadership with contextualised HRM practices to support employees coping with issues related to the perception of reduced opportunities. In addition, attention should be paid to leadership behaviours of local leaders, and not necessarily of those at the apex of the organisational hierarchy guiding the merger.

Keywords: Mergers and acquisitions (M&A); Transformational leadership (TL); Human resource management (HRM); Mode 2; Mixed methods.

1. Introduction

Transformational leadership (TL) continues to be one of the most applied and debated leadership models in the literature (e.g., Duan et al., 2022; Jensen et al., 2020). In contrast to transactional leaders, a transformational leader is defined as someone who 'engages with others in such a way that the leader and the follower raise one another to a higher level of motivation and morality' (Burns, 1978, p. 20). Empirical studies demonstrate that TL is a predictor of several individual and organisational outcomes, including organisational commitment, job satisfaction, wellbeing, creativity and innovation (e.g., Van der Voet, 2014).

Notwithstanding the importance of TL research, in recent years, scholars have criticised TL studies of leadership (e.g., Alvesson & Kärreman, 2016; Learmonth & Morell, 2019). The first criticism relates to the role of the context in which TL takes place. Little attention has been given to the context in analysing the effects of leaders and their behaviours on others (Liden & Antonakis, 2009). Mainstream contributions fail to acknowledge that leader and followers are immersed in diverse contexts that shape and are shaped by leader's behaviour. Given their leader-centric approach, it has been argued that TL studies are implicitly informed by a view of leaders as solitary heroes who are so powerful that they are solely responsible for a wide range of individual and organisational outcomes. Such assumptions are mainly tested with quantitative approaches, and more qualitative explorations are required to discard this 'heroic' view. The second criticism relates to scholars' knowledge-creation processes (e.g., Alvesson & Kärreman, 2016). Namely, it is argued that TL studies are dominated by a purely academic approach involving no collaboration with practice, raising questions about the practical value of scientific results in this field (Alvesson & Kärreman, 2016). These two criticisms are connected, because an

exclusively theory-driven approach and a knowledge-creation process detached from reality tend to reinforce the tendency for a de-contextualised view of TL and its outcomes.

Responding to the first criticism, this study aims at analysing TL and its effects on employees' attitudes in the context of mergers and acquisitions (M&As). In the last years, indeed, research on M&A failures has shown that employees attitudes such as affective commitment (AC) and job satisfaction (JS) are seen as central outcomes for an M&A process to achieve expected performance (e.g. Dao et al., 2016), with leadership style being a key antecedent of these employees' attitudes (e.g., Giessner et al, 2016). The understanding that employees' attitudes to a M&A can determine the performance of the M&A itself (Steigenberger, 2017) has led to what is known as a 'psychological turn' in extant M&A research (Degbey et al., 2021). Within this stream of literature, some scholars have recently explored how the organisational levers interact for supporting employees in positively making sense of a M&A (including leadership and HRM) (Cooke et al., 2021).

Responding to the second criticism and to the need for more diverse knowledge-creation processes when studying leadership (e.g., Kastanakis et al., 2019), this study adopts a mixed-methods research design by using a Mode-2 research orientation. Mode-2 differs from Mode-1 in emphasising collaboration between scholars and practitioners whereby practically relevant and scientifically rigorous knowledge is generated in the context of application (e.g., Gibbons et al., 1994). It forms the basis for a diverse set of engaged scholarship approaches that emphasise the development of academic knowledge "for and from practice" (Avenier & Cajaiba, 2012; Van de Ven & Johnson, 2006).

This Mode-2 study is based on qualitative and quantitative data, and it uses appropriate Mode-1 techniques and quality controls (e.g., Guerci et al., 2019; Kulik, 2021) to contribute to the

debate about contextualized TL as well as to the literature stream on organizational variables that affect employee attitudes in M&As. In particular, it shows that opportunity-enhancing HRM practices (O-HRM) - intended to design work in such a way to allow employees to exercise their competencies and effort in engaging with the organisation's decision-making processes (Jiang et al., 2012) - are management practices that mediate the relationship between TL and JS and AC. JS and AC represent employees' attitudes that extant literature considers central to M&A success (e.g., Dao et al., 2016). Thus, this study illustrates how TL should be complemented with context-related HRM practices and how the leadership behaviours of local leaders – and not only of top management – play a relevant role in developing such positive attitudes in M&A.

Beyond these specific contributions, the study illustrates how a Mode-2 research orientation, typically characterised by a mixed-methods research design and a multidisciplinary approach, helps researchers to gain meaningful insights and practitioners to obtain actionable knowledge into how to make M&A processes successful by leveraging on employees' positive attitudes to them.

This article follows a non-traditional structure, in line with a call for non-formulaic research (Delbridge & Fiss, 2013). It begins by providing information about the context in which the research projects took place, explaining why a Mode-2 orientation was suitable (see Figure 1 for a summary of the overall research project and its phases). It then chronologically reports the results of the different phases of the project, each characterised by specific methods. Finally, it discusses the research outcomes and their implications, and reflects on employing Mode 2 to study leadership.

Insert Figure 1 about here

2. Research context and Mode-2 mixed-methods approach: an Overview

This research was carried out in collaboration with an Italian company in the real-estate funds industry. RealBrick is characterised by high turbulence and has experienced significant changes. It was established in 2011 as the result of a merger of RedBrick and BlueBrick, two companies in the same industry, with 118 employees. There were two reasons for turbulence and complexity in this context. The first reason relates to the peculiar characteristics of the two merged companies. RedBrick was young and had an aggressive approach to the market, with mainly private investors and 51 employees, while BlueBrick was a state-owned company that adopted a more cautious approach to the market, with 73 employees. They were both small companies with strong ties to their entrepreneurial chief executive officers (CEOs), and with non-standardised and informal organisational structures, roles and processes. The Italian real-estate funds industry is relatively young, has few players with high turnovers, and is subject to cumbersome regulation and supervision from national financial authorities. The merger was intended to establish a new large player in this fragmented market. Following the merger, procedures, standardised processes, new norms and a new organisational structure were introduced, aiming not only to achieve efficiency and effectiveness but also to encourage integration amongst the new organisation's functions and members. With two offices located in Milan and Rome, the new company was ready to embark on its journey.

RealBrick was the natural industry leader because of its size, with assets under management that were almost twice those of its closest competitor. Its economic performance was solid. However, recognising the importance of employees' attitudes to the merger's success, its management team perceived a general atmosphere of growing discontentment. The previous organisational leaders' influence was evident, and top management felt the need for a deeper

investigation of the dynamics in place. In fact, the company needed to manage organisational members' commitment in a situation (i.e., the M&A) that might potentially be dangerous to them. This is where the research project began.

The decision was made to pursue a Mode-2 mixed-methods approach, because M&As are challenging contexts which require to address leadership dynamics with a wide variety of hidden variables. Collaboration and dialogue were viewed as critical for deep-level understanding, thus requiring a Mode-2 approach. The Mode-2 versus Mode-1 debate is a lively one in academic arenas (e.g., Shani & Coghlan, 2014; Bleijenbergh et al., 2021). Mode-2 research orientation emphasises that knowledge should be produced in the context of application, driven by either real phenomena or practical issues, and that researchers should engage and collaborate with stakeholders during the knowledge-creation process by using a variety of collaborative protocols (Gibbons et al., 1994; MacLean et al., 2002; Coghlan et al., 2020). Mode-2 includes various methodologies such as action research, collaborative management research, intervention research, and clinical inquiry (Canterino et al., 2016; Canterino et al., 2018). In Mode-1, which is mainly driven by an academic agenda, the researcher is a detached observer of reality, uses quantitative and qualitative analytical tools and has limited interaction and engagement with the system under inquiry (Tranfield & Starkey, 1998). However, although many scholars recognise Mode-2 as a useful approach to bridging rigour and relevance, few empirical articles in scholarly management journals "explicitly use the approach" (Bartunek, 2011, p. 556; Paine & Delmhorst, 2020). Indeed, Mode-2 and Mode-1 research designs are mutually alternative epistemological choices, which start from two different epistemological assumptions (Coghlan, 2011; Coglan et al., 2019).

Coherent with this approach, the project consisted of distinct phases that employed integrated qualitative and quantitative research methods. First, to better solve the company's

problem, the first (qualitative) phase of the process sought to better understand the context, with the primary aims of identifying the leadership model that best fitted the company, variables other than leadership that were impacting employees' attitudes, and specific employee attitudes that seemed most relevant. This inquiry was conducted through qualitative data collection designed jointly with the organisation through the creation of a research team of practitioners and researchers (Shani et al., 2008; Shani & Coghlan, 2021). The second (theoretical) phase was dedicated to reviewing related literature to assess whether extant research already provided convincing evidence of the phenomena addressed. Following an extensive literature review, the researchers concluded that the intersection between TL and HRM in general, and in the M&A context in particular, is a well-established knowledge gap. Consequently, the research team jointly developed a theory-driven, context-relevant research model. The third (quantitative) phase related to testing a model hypothesising specific relationships between the variables identified in the qualitative phase. This phase was based on a survey delivered to all organisational members. It was also the phase in which the results were translated into practical organisational interventions.

3. First (qualitative) phase: "Situating" transformational leadership in the M&A context

The first phase of the research process was dedicated to focalising: (1) the most appropriate leadership model for framing leadership dynamics in the M&A context under study, which turned out to be TL; (2) the dependent variables (i.e., the most critical employee attitudes in the context under study), which were found to be AC and JS; and (3) intervening variables (i.e., variables other than leadership affecting AC and JS) relevant to the context, which were found to be O-HRM practices. To achieve these objectives, the research team agreed that interviews with open-ended questions would be the most suitable method, given the complexity and context of the studied phenomena. The research team adopted a traditional scientific process for qualitative data

collection and analysis, while seeking to contextualise the empirical material. The interviews were followed by data interpretation and sense-making collaborative sessions, in which both researchers and company personnel participated.

3.1 Qualitative methods adopted in the first phase

The primary source of evidence for this phase was a face-to-face, semi-structured interview based on an interview protocol jointly developed by the research team. The questions were designed to "inquire from the inside", with the aim of capturing workers' perceptions of the company's current situation related to the aspects of interest (Evered & Louis, 1981). Following recommended qualitative methods (Malmqvist et al., 2019), the interview protocol was pilot tested on two managers and six employees (subsequently excluded from the analysis). The interview protocol was then designed around three sections. The first was related to the perceived corporate strategy, organisational design, company performance, and possible threats in the market, with the objective of understanding the company's perceived position in its competitive arena. The second inquired into the overall M&A experience and the criticalities perceived to detect relevant employees' attitudes on which to focus. The final section aimed to identify leadership models and organisational interventions that positively or negatively affected the emergence of such attitudes by posing questions directly addressing the company's leadership and management style as well as the organisational structure, the HRM system, and key processes, procedures and roles.

The interviews were carried out in parallel at the two locations in Rome and Milan and involved personnel from various business functions and hierarchical levels (top management, middle management and employees). The CEO who had led the merger, all 20 managers and a sample of 30 employees were interviewed. To represent a spectrum of views, the research team decided on four criteria for selecting managers and employees for the interview: (1) at least one

employee and one manager from each organisational unit; (2) a balance of backgrounds between employees and managers from RedBrick and BlueBrick, and those hired by RealBrick after the merger; (3) a balance of locations between employees and managers operating in Milan and Rome; and (4) balanced gender. All interviews, lasting between 60 and 90 minutes and led by two members of the research team, were conducted over a period of two months. They were recorded and transcribed, resulting in more than 500 transcribed pages and 3,700 recorded minutes of primary source material. The research team also reviewed internal company documents and external media articles. The researchers and selected company personnel representing various perspectives first analysed the interviews individually, using both within-case and cross-case techniques (Eisenhardt, 1989).

All interviews were coded by all the authors. In the first phase, thematic coding was produced by comparing and contrasting each other's interpretations and categories. Discussions between the authors led to a template comprising a set of first-order codes, which were subsequently applied by each author to a subsample of the interview transcripts. In the second phase, through iterative meetings and discussions, the main codes were aggregated into the constructs reported in Section 3.2. Fig. 1 illustrates the logical structure of the coding process with some exemplary quotes. This procedure is consistent with current protocols for qualitative data analysis (e.g., Gioia et al., 2013), as well as with recent Mode-2 studies in HRM (Malhotra et al., 2020).

Insert Figure 1 about here

To ensure the validity of the interpretation, following completion of the analysis, the final data were reviewed by external readers with knowledge of the topic, selected by the academic researchers, and internal readers comprising senior people from different units of the company. After the coding was completed, for sense-making and meaning creation, the main findings were

summarised in a data document for shared interpretation within the research team. Key issues emerging from the data were discussed. The data document, its interpretation and emerging issues were shared with top management and then synthetically presented to all organisational members.

3.2 Key findings: Organisational leaders and the organisational context

The research team initially focused on finding evidence related to the importance of leadership among employees and the leadership model most suitable for describing employees' expectations. The qualitative data collection confirmed that employees' experience of their organisational leaders was a relevant variable. In fact, a major factor affecting people's working experiences following the merger was the leadership change.

The data collection and analysis revealed two main elements related to the leaders. First, in their previous companies, people had been exposed to TL behaviours. Second, employees were closely examining the new organisation's leadership roles and styles and comparing them with pre-merger leadership roles. TL had been aligned with the nature and culture of the pre-merger companies, both of which had been small and very entrepreneur-dependent. Transformational leaders are supposed to inspire followers, increasing individuals' awareness of the significance of task outcomes and encouraging subordinates to go beyond their own self-interests to consider the organisation's interests (Bass, 1990).

The following quotes are the most representative of the TL behaviours experienced by RealBrick employees prior to the merger, relating, for example, to sharing a vision, being people-orientated, motivating through leading by example and idealised influence, and challenging people's performance:

In BlueBrick my manager was someone who knew how to form a relationship with personnel despite the hierarchy, and frequently gave feedback to help us grow (Accounting, employee, Milan).

Before the merger, our CEO never had to raise his voice. We all had such a high regard for him that when we made mistakes, we felt really guilty and sorry for the company. We were responsible for ourselves because we had a strong sense of duty (Communication, employee, Rome).

The CEO always knew how to show us an acceptable way. He used to communicate us the (realistic) strategy clearly and put the company's values into practice (Accounting, manager, Milan).

The following quotes exemplify comparisons between pre- and post-merger organisational leaders, again showing how employees expected to see a TL attitude in the new company:

I do expect managers to involve us in the big picture as they were doing before, giving information about what the company is doing and where we are going (Fund Management, employee, Rome).

I can tell the CEO is a very challenging person. He always asks for the best and beyond, as it also was in RedBrick, even if sometimes I feel like he's expecting it just from the first line, and not by all the employees. It is a bit disappointing, because in RedBrick I never experienced this kind of difference (Human resources, employee, Milan).

Having identified TL as the reference model for describing the leadership expected by RealBrick's workforce, the research team focused on key employee-level variables that might undermine the success of the ongoing M&A process. The data analysis confirmed employees'

general discontentment, with particularly low levels of AC and JS. The following quotes represent the low levels of AC amongst RealBrick employees:

> *I do not feel like "being part of the family" here; I only work here because of the wage* (Fund Management, manager, Milan).
>
> *We need a sense of corporate belonging, which is missing for me* (Accounting, employee, Rome).

The employees also revealed low levels of JS:

> *One question that I would like to be asked is "Are you satisfied with your work?" I would answer that there is definitely room for improvement* (Business Development, employee, Rome).
>
> *Some working days seem endless… Too many and non-value-adding- procedures to follow, not enough value attributed to my work* (Fund Management, employee, Rome).

Indeed, the post-merger company's top management seemed to assume that employees' AC and JS were high simply because "we are the best, we are the uncontested leader" (quote by top manager). However, employees did not see this status as sufficient to secure their JS and AC. They claimed that it was important to consider factors other than the company's economic and business success to improve their JS and AC.

Finally, having identified the dependent variables, the researchers focused on identifying potential explanatory variables other than leadership that might affect employees' AC and JS. After the merger, employees' perceptions of organisational leaders were combined with their perceptions of ongoing changes to organisational practices and new ways of doing things. There was a sudden shift from the informal practices of a small company in which everybody knew each other, to working in a larger, extremely structured company with several hierarchical layers. As a

result, the sense of "being at the edge of the empire" (quote by an employee) was a common perception, especially among operational-level employees. Problems related to perceived opportunities to participate in the company's decision-making processes were also observed. Perceived opportunities are defined as environmental or contextual mechanisms that enable employees' action, participation and involvement (Wright & Nishii, 2013). The following quotes illustrate that O-HRM practices were a critical issue in RealBrick, as both pre-merger companies were perceived as having offered more opportunity-enhancing work environments:

> *Before the merger, we were a small, entrepreneur-dependent company. You had a direct relationship with the boss: you could pass in front of his room and he called you in to talk. Now there are different hierarchical levels and this communication could never happen; the company has much more operational work* (Fund Management, employee, Rome).
>
> *When I was at RedBrick, I used to participate in all of the meetings with the CEO just because that was the routine: we were few and everybody was involved. Now I am pretty sure that the new CEO has no idea who I am* (Fund Management, employee, Milan).

In summary, the overall picture emerging from the first phase of data collection and analysis was that leadership in general, and TL in particular, were important in the M&A context faced by RealBrick. However, it also emerged that adopting appropriate leadership was insufficient, because the JS and AC of employees who were making sense of the M&A experience and what was happening in the company in that context were also influenced by other variables. In RealBrick, TL effectiveness was affected by perceived opportunity-enhancing practices. Thus, another relevant variable that shaped employees' AC and JS was O-HRM practices (Jiang et al., 2012), and the later phases of the research process were devoted to exploring available knowledge of how TL and O-HRM jointly impacted on AC and JS in the M&A context.

4. Second (theoretical) phase: Reviewing knowledge of TL and HRM in M&As

The research team and RealBrick's top management agreed to further explore the variables relevant to the company that emerged in the first phase. Available knowledge in two different domains was investigated. The first was related to knowledge about how to manage employees' attitudes in M&As. First, the researchers sought evidence on the relatively neglected topic of the role of leadership in M&As (Junni & Sarala, 2014). The M&A literature suggests that managing employees' attitudes in M&A contexts requires use of a wide range of leverage types to restore organisational members' positive picture of the M&A process (Steigenberger, 2017) and overcome unproductive power plays and corporate politics (Korzynski et al., 2021). In such contexts, leadership is fundamental to activate a positive sense-making of the M&A experience from employees' perspectives, because organisational leaders can mobilise resources towards new outcomes and mitigate employees' negative reactions (Monin et al., 2013; Giessner et al., 2016). Indeed, research shows that differing leadership styles affect employees' attitudes to the M&A process in different ways (for a review, see Cooke et al., 2021).

However, studies on the effect of leadership on employees' attitudes in M&A contexts have been criticised for being too normative or "glamorising" leaders (e.g., Syed et al., 2021). As Steigenberger (2017) suggests, research is needed on how management can establish effective leadership styles in M&A contexts, focusing particularly on interactions between leadership and other structural interventions, such as HRM practices, which may affect employees' attitudes. Therefore, the focus shifted to how TL and O-HRM interact in impacting AC and JS, with a particular emphasis on M&As. Such insights would be beneficial to the company in legitimising organisational interventions in O-HRM practices.

Focusing on TL and JS, several studies demonstrate the positive impact of TL on JS in general and in M&A contexts in particular (Dao et al., 2016). However, scholars highlight the need for closer examination of factors influencing and mediating these relationships (Kammerhoff et al., 2019). In the specific context of M&As, some studies identify TL as the most effective leadership model, through the development of positive employees' attitudes (Cooke et al., 2021). Scholars have interpreted these findings as indicating that the most satisfied employees are those who experience consideration, socio-emotional support, concern and a developmental orientation from their leaders, all of which are key features of TL. Many studies also demonstrate how TL may explain AC (e.g., Hiller et al., 2011), in light of key features of TL such as leaders' ability to generate a shared vision or model the way forward, which are likely to foster emotional attachment between employee and employer. In addition, some authors argue that leaders' role in the post-combination phase, when the integration has been completed of previous entities' processes, roles, policies, HR and IT systems, is to manage operations and activities as they would do in any stable daily routine (Hiahioui et al., 2013). Therefore, evidence of the positive effect of TL on AC and JS is crucial in M&A contexts. These findings enabled the research team to provide RealBrick with evidence of positive associations between TL, and JS and AC.

In relation to O-HRM, JS and AC in M&A contexts, an established stream of HRM literature explores the role of HRM practices in supporting M&A processes (Aklamanu et al., 2016), thus highlighting the key importance of O-HRM as a set of practices that helps employees to make positive sense of M&A-related change processes and therefore react positively (Junni & Sarala, 2014). Indeed, as AC and JS have been found to be associated with a wide range of favourable individual- and organisational-level outcomes, they have been extensively studied in research on O-HRM in M&As (e.g., Siegenthaler, 2011; Cooke et al., 2021). According to Brown and Cregan

(2008), O-HRM practices convey a positive message to employees about their value to the organisation, thereby supporting them in making sense of the M&A process and improving their JS and their AC to the new employer. Overall, these considerations led the research team to provide the company with evidence of positive associations between O-HRM, JS and AC in M&As.

In relation to the intersection between TL and O-HRM in M&A contexts, several studies show how responsibility for many O-HRM tasks has shifted from central HRM departments to team leaders. Consequently, organisational leaders are conceptualised as agents of the organisation for managing employees, and employees are likely to be influenced by both centrally designed O-HRM practices and their local managerial implementation (Gill, 2012). As a result, HRM responsibilities are shared between managers and the HRM department (Cooke et al., 2021). However, a broad range of studies provides evidence of a disconnect between managers' and employees' perceptions of O-HRM practices within units as well as between managers' and HRM professionals' perceptions of the effectiveness of their companies' O-HRM practices (Wright & Nishii, 2013). For this reason, leaders' role as implementers of O-HRM practices is attracting increasing attention. For example, this stream of literature highlights the extent to which TL interacts with O-HRM practices in enacting specific psychological contracts and the joint effects of O-HRM and TL on organisational and team performance (McDermott et al., 2013).

Although these studies make significant advances, knowledge remains limited regarding how leadership may effectively shape employees' positive attitudes in M&As in general and the way in such contexts O-HRM is affected by leadership (Amor et al., 2020). While acknowledging that leadership behaviours that both support and interact with organisational O-HRM practices are key to organisational performance (McDermott et al., 2013; Zhu et al., 2005), we note that extant literature fails to provide conclusive evidence of the effects of the relationship between TL and O-

HRM on employee-level outcomes (Amor et al., 2020). This highlights a need to investigate and further understand the underlying influence of TL on employees' attitudes by exploring the role of opportunity-enhancing factors.

As a result, the research team reviewed current M&A literature investigating, within a 'psychological turn', those employees' attitudes that are central to M&A success, the organisational levers that can support these attitudes as well as the interactions among those levers. However, the research team was still unable to provide the company with clear and specific evidence of a link between O-HRM and TL in the M&A context. This lack of scientific knowledge on the specific topics relevant to the company triggered the third phase of the research project, aimed at empirically testing the developed 'situated' model. Based on the above-reported literature, the research team hypothesised that (see Figure 2):

H1. Transformational leadership is positively associated with affective commitment (**H1A**), job satisfaction (**H1B**) and opportunity-enhancing HRM (**H1C**).

H2. Opportunity-enhancing HRM is positively associated with affective commitment (**H2A**) and job satisfaction (**H2B**).

H3. The positive associations between transformational leadership, affective commitment and job satisfaction are mediated by opportunity-enhancing HRM.

Insert Figure 2 about here

5. Third (quantitative) phase: Empirically testing the "situated-M&A-context" research model

This phase of the study concerned the design and implementation of quantitative data collection to test the hypotheses.

5.1 Quantitative methods adopted in the second phase

The survey protocol and procedures were defined jointly by the research team. A survey was delivered to all employees to test the theoretical framework.

The research team found the use of employee data appropriate to address the research questions. Indeed, according to the process approach to HRM, which focuses on the psychological processes through which employees attach meanings to HR practices and systems, there is a gap between intended HR practices devised by HR or line managers and employees' perceptions of those practices. Specifically, employees' perceptions of HR practices are decisive in explaining variance in attitudes such as JS and AC (Wright & Nishii, 2013).

An English version of the survey items, based on scales identified by the researchers, was translated into Italian to ensure the use of appropriate company language and avoid the risk of questions not being correctly understood. A web-based survey platform was created to enable the entire company to participate in the study. Technical aspects were carefully designed to ensure both anonymity of the answers and full commitment of the entire organisation. Several reminders by both the researchers and the HR director helped boost responses, resulting in a response rate of 87% (n = 103). Specific actions were taken to avoid social desirability bias. Namely, two different emails were sent to employees: the first email was sent by the CEO, explaining that the survey data collection aimed to improve their working experience, and therefore that sincerity would benefit them; and the second separate invitation email from the university researchers guaranteed complete anonymity of their answers. The web platform for collecting responses used only the university's logo and not the company's one. No response bias was found when comparing respondents with non-respondents, early versus late respondents, and respondents who completed the questionnaire fully or partially.

5.2 Data analysis and common method bias tests

To analyse the research model and study the relationships between different variables and the weight that each of them exerted on the others, we chose a specific structural equation modelling technique, namely the Partial Least Squares (PLS-SEM), using SmartPLS 3.0 software. There were three main reasons for this choice. First, PLS-SEM does not require assumptions about multivariate normality. Tests of whether the indicators included in the model presented normal distributions led to rejection of the normal distribution hypothesis, thus confirming the appropriateness of PLS-SEM. Second, all the variables under study had multiple indicators, and since the primary aim of PLS-SEM, unlike more traditional co-variance SEM, is to maximise the variance explained in latent and endogenous variables, it weights indicator loadings on constructs in the context of the theoretical model rather than in isolation (Hair et al., 2019). Third, owing to its iterative algorithm, PLS is robust for studies with relatively small sample sizes, especially when testing complex models with large numbers of variables and/or indicators per variable. For all these reasons, it was useful for testing cause–effect relationships and mediating effects involving constructs such as AC and JS (Ringle et al., 2018; Hair et al., 2019). In particular, we followed a two-step approach to the PLS-SEM, testing the measurement model based on confirmatory factor analysis (see Section 5.4.1), and then, the structural model based on bootstrapping (see Section 5.4.2).

To test for potential common method bias, we followed three steps. First, with regard to multicollinearity, we analysed variance inflation factors (VIFs), which were all below the recommended threshold of 10. Second, we performed Harman's single-factor test (Podsakoff et al., 2003), which revealed the presence of multiple factors rather than one. Third, we performed marker variable analysis. Since no specific marker variable was included in the questionnaire, we

used the smallest observed correlation among all the substantive variables as a proxy, as suggested by Lindell and Whitney (2001). The lowest correlations were below 0.001 for the binary and ordinary variables; therefore, common method bias was not a concern.

5.3 Measures for the constructs

Following Brislin's (1990) back-translation procedures, the original scales in English were translated into Italian, and then back-translated. To ensure their accuracy, we adopted a three-stage process. First, a professional translator and the authors collaboratively conducted an iterative process of detecting faults and discrepancies that might give rise to differences in meanings between the two versions of the survey, and made further revisions to create two equivalent versions. Second, we ran a pilot test with 10 employees. Third, another professional translator translated the survey back into English to corroborate the validity of the process.

All items were adopted from published research and were measured on a 5-point Likert scale (1 = strongly disagree; 5 = strongly agree). The research team chose items based on their appropriateness for the organisation and its characteristics.

Transformational leadership. Two alternative scales were examined and discussed by the research team. As an alternative to Avolio et al.'s scale (1999), Kouzes and Posner's (2012) proposed measurement scale was chosen because it was recognised as being more in line with the company's language and the behaviours displayed within the company. Twenty-five items adapted from the original scale aimed to map employees' perceptions of five dimensions of TL, each with five items, related to the company's leaders: model the way, inspire a shared vision, challenge the process, enable others to act and encourage the heart. Although some scholars suggest using sub-dimensions of TL, particularly for specific examinations of TL (e.g., Jensen et al., 2020), many authors confirm that TL can appropriately be used as an overall construct in light of high

correlations between sub-dimensions (e.g., Zhu et al., 2005; DeRue et al., 2011; Tejeda et al., 2001). Therefore, in line with the context and scope of this study, we considered TL as a single factor, although we might focus on sub-dimensions in future research.

O-HRM practices. O-HRM was measured using five items from Kehoe and Wright (2013). The study measured perceptions of O-HRM practices related to enhancing opportunities for employees to participate in the organisation.

Job satisfaction. JS was measured with four items adapted from Cammann et al. (1979), including "I feel satisfied with my current job".

Affective commitment. AC was measured using four items adapted from Allen and Meyer (1990), including "I would be very happy to spend the rest of my career in this company".

Control variables. Following common practice in leadership studies, initial consideration was given to gender (e.g., Reuvers et al., 2008), age (e.g., Herman et al., 2017), seniority in terms of whether the respondent had been hired before or after the merger (e.g., Ghadi et al., 2013) and hierarchical level (e.g., Edwards & Gill, 2012). As these variables showed no significant impact on the model, they were not included.

5.4 Results

5.4.1 Measurement model: construct validity and reliability

The constructs were validated by testing internal consistency, composite reliability, convergent, and discriminant validity (see Table 1). To verify the internal consistency and composite reliability of the constructs, we verified that the value of Cronbach's alpha and composite reliability indices exceeded 0.7 (Nunnally & Bernstein, 1994). This condition was valid for all the constructs. To test convergent validity, we verified that the average variance extracted (AVE) index was greater than 50%. The discriminant validity of the constructs was tested in three

ways (Fornell & Larcker, 1981). First, the correlation matrix proved that the AVE was greater than the square correlation between each pair of latent constructs (Fornell-Larcker criterion). Second, we verified the outer loadings for each item to be higher than the cross-loadings. Third, we checked the heterotrait-monotrait ratios, and they were all below the suggested threshold of 0.9 (Ringle et al., 2018). Overall, these results suggest the validity of the constructs used in our analysis and the adequacy of the items used as construct indicators. Table 2 summarises the constructs, with items and factor loadings for each latent construct.

Insert Table 1 and Table 2 about here

5.4.2 Structural model: hypotheses testing

Table 3 shows the results of the structural model from the PLS analysis, including standardized path coefficients with two-tailed t-tests for the hypotheses and the post-hoc tests for testing the mediation effect of O-HRM. Results supported all the hypothesised direct and indirect paths. In fact, path analysis confirmed a significant positive direct impact of TL on AC ($\beta = 0.26$; $p < 0.5$), JS ($\beta = 0.21$; $p < 0.001$) and O-HRM ($\beta = 0.58$; $p < 0.001$), thus confirming H1A, H1B and H1C. The path analysis also revealed a significant positive direct impact of O-HRM on AC ($\beta = 0.38$; $p < 0.001$) and JS ($\beta = 0.35$; $p < 0.01$), thus confirming H2A and H2B. Finally, the mediation effect of O-HRM is confirmed, as the post-hoc tests for the indirect effect of O-HRM on AC and JS are statistically significant for the path TL→O-HRM→ AC ($\beta = 0.594$; $p < 0.001$) and the path TL→O-HRM→JS ($\beta = 0.643$; $p < 0.001$), thus confirming H3.

Insert Table 3 about here

6. Discussion and implications

6.1 Contribution to extant knowledge and theoretical implications

The first implication of our study is related to the role of local leaders in M&As. We illustrate the relevance of the role played by the transformational local leaders involved in M&As in supporting employees in recognizing O-HRM practices offered by the organisation. This appears to be in contrast with some current studies on TL in M&As, which typically "have tended to focus on the higher levels of management" (Cooke, 2021, p. 3), neglecting the role of local leaders. The importance of their role seems instead to be fully recognized by current HRM research (Trullen et al., 2020). Middle managers, indeed, are not conceived as local implementers of HRM practices centrally designed, but active interpreters of those practices. Their ability to effectively frame and communicate such practices to their employees is considered a critical success factor within an organisation (Van Mierlo et al, 2018). Accordingly, this study shows how this devolution of responsibilities becomes even more crucial in M&As, in contrast with previous perspectives that warned against giving 'too much' responsibility to local leaders in M&As (e.g., Correia et al., 2013; Dany et al., 2008).

Second, our study empirically confirms the key assumptions from scholars who have strongly criticised TL studies for their un-contextualized view of leadership (e.g., Alvesson & Kärreman, 2016; Learmonth & Morell, 2019). The successful leader(s) in M&As emerging from this study is not a solitary hero who has the power to 'produce' employees' attitudes regardless of the context, but instead is an actor who mobilizes specific contextual elements (Canterino et al., 2020) for promoting desired employees' attitudes. Our data show that, in this M&A context, TL is positively associated with O-HRM. This implies that transformational leaders promote JS and AC by 'making visible' to employees certain elements of the organisational context, namely those

HRM practices provided for by the organisation, so that the M&A process can be an opportunity for them. The focus on O-HRM emerges as particularly relevant: M&A processes are often perceived by employees as opportunity-reducing processes, with negative effects on their attitudes (Vasilaki et al., 2016). In contrast, our findings suggest that TL and O-HRM practices should be considered *together* as possible organisational levers to cope with issues related to the perception of increased power-distance and reduced opportunities in M&As (Rozen-Bakher, 2018), suggesting the importance of a context-related view of TL.

The two above-mentioned implications contribute to the knowledge produced in the stream of research related to the 'psychological turn' in M&A research (Degbey et al., 2021) which has recognized the key role that employees play in determining the performance of M&As. Within this development of current research, few scholars have started exploring which organisational levers can facilitate the emergence of positive employees' attitudes and how those organisational levers interact (Cooke et al., 2021). Indeed, although it is generally believed that O-HRM and TL may contribute positively and jointly to employees' attitudes during M&As (e.g., Correia et al., 2013; Cooke et al., 2021), limited corroborative evidence exists on their interaction, and 'scant research exists examining the effect of HRM practices on employee behaviour in M&A integration and the role that leaders play within this' (Vasilaki et al., 2016, p. 2488). Our mixed-methods Mode-2 study is one of the first to produce empirically supported knowledge regarding the relationships between TL, JS and AC. Indeed, even if the direct relationship between TL and JS/AC has been confirmed by previous research (e.g., Kanat-Maymon et al., 2020; Wang & Gagné, 2013), our results show a possible mechanism through which TL affects these employee outcomes. TL effects result to be mediated by O-HRM practices, which suggests the idea that, in M&A contexts, TL

needs to promote the employees' perception of effective opportunity-enhancing HRM practices to positively affect JS and AC. These findings have two main theoretical implications.

6.2 Managerial implications, limitations and future research

We illustrate the managerial implications of this study actually highlighting what the company did on the basis of the findings, which led to prioritise four specific interventions on TL and O-HRM. First, concerning TL, top management decided to (i) introduce a leadership-development programme for middle managers to foster TL behaviours. The other actions were related to O-HRM and involved (ii) improving internal communication processes (both top-down and bottom-up), especially between top management, middle managers and employees; (iii) implementing wide-participation processes to establish a repository of best-practices; and (iv) establishing participatory processes to streamline the procedures already in place. After six months, two meetings were organised with the CEO, HR director and managers to discuss changes in organisational members' attitudes.

Building on our study, we also highlight some key general recommendations for organisations involved in M&As processes, as follows: (i) to support all leaders (i.e., both top and middle managers) to develop TL-related skills; (ii) implement a wide set of O-HRM practices; (iii) provide all leaders with HRM-related skills and the autonomy needed for making O-HRM practices visible to employees; (iv) keep JS and AC constantly under review, to check the effects of interventions related to TL and O-HRM on JS and AC over time.

This study has three basic limitations each of which suggests far-reaching avenues for future research. First, it examines specific contextual features, raising questions about the generalisability of the findings. Further research might explore the same phenomena in different organisational settings, in different national cultures and in cross-organisational contexts. For example, further

studies can explore whether individual-level mechanisms emerging from this study for predicting JS and AC should be complemented with team-level dynamics, especially when considering M&As occurring in national cultures characterised by high levels of collectivism.

These contextual specificities also relate to the second main limitation, which is the choice of constructs as independent and dependent variables. In our situated model, TL as an independent variable, O-HRM as an intervening variable, and JS and AC as dependent variables made sense for all stakeholders involved in the study. However, it is possible that, in other contexts, stakeholders might consider completely different variables. For example, in M&As occurring in mechanistic (rather than organic) and labour- (rather than capital-) intensive organisational contexts, it is possible that transactional (rather than transformational) leadership, motivation- (instead of opportunity-) enhancing HRM, and employee outcomes such as absenteeism (rather than JS and AC) are more suitable.

A third limitation of this study consists in the way the researchers/practitioners collaboration took place. The avenues for future research do not necessarily require Mode-2 projects to be fully explored, as future studies can represent incremental refinements of the key findings emerging from this research. However, we still call for other Mode-2 projects in M&A contexts to explore how organisational interventions interact when aiming to improve employees' attitudes. We argue that other Mode-2 projects adopting different collaboration strategies on the same issues have still the potential to produce radically innovative theory which could extend and/or complement the theoretical advancements achieved by this study.

6.3 A reflexive account of Mode-2 mixed-methods leadership studies

We adopted a Mode-2 mixed-methods approach that integrated Mode-1 research methods, which provided a structured process to place our research questions in the intersection between

practical interests, such as how to minimise employees' misunderstandings, and theoretical gaps, such as developing new, rigorous knowledge of how TL and O-HRM drive employees' attitudes in M&A contexts. We were thus critically embedded in the organisation studied. Specifically, the research goals, design and ultimate impact were conceived jointly by the research team and aligned with the organisation's priorities. As researchers, adopting collaborative protocols enabled us to engage in a prolonged (two-year) mixed-methods observation that provided us with in-depth qualitative and quantitative data (Van de Ven, 2007; Guerci et al., 2019).

The Mode-2 approach allowed us to foster organisational members' strong commitment to the research project, which improved both our access to data and the reliability of the information provided. In addition, our two-year immersion in the real life of the organisation enabled the creation of a trans-disciplinary research team, which enhanced the possibility of developing a problem-based perspective that would lead to exploration of the interface between leadership and HRM. We believe that this Mode-2, mixed-methods approach that integrated Mode 1 methods, allowed us to achieve scientific results rarely achievable with a typical, single-method, Mode-1 approach.

7. Conclusions

Leadership studies have been criticised for being 'leader-centric', with little attention given to the context. This study presents the results of a Mode-2, mixed-methods research project carried out in a company that had recently gone through an M&A process. This empirical study is one of the first to examine the role of O-HRM as a mediator between TL and employees' attitudes and constitutes a reference for promoting positive employee attitudes in M&A contexts. It also shows that it is possible to conduct collaborative management research both rigorously and relevantly

through true collaboration and full engagement of researchers and practitioners in formulating, designing and executing a scientific research project.

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Table 1

Means, standard deviations, alpha, CR, AVE and correlations[a]

	Mean	Std Deviation	α	CR	1	2	3	4
1 Transformational leadership	3.10	0.68	0.96	0.97	**0.71**	0.53**	0.43**	0.39**
2 Opportunity-enhancing HRM	2.75	0.76	0.76	0.84	0.53**	**0.76**	0.52**	0.46**
3 Affective commitment	3.41	0.86	0.73	0.85	0.43**	0.52**	**0.81**	0.57**
4 Job satisfaction	3.35	0.89	0.84	0.90	0.39**	0.46**	0.57**	**0.87**

[a] The square root of AVE is on the diagonal

Table 2

Summary of constructs

Construct	Loading
Transformational leadership (TL)	
TLC1	0.6975
TLC2	0.8398
TLC3	0.8591
TLC4	0.7355
TLC5	0.6683
TLE1	0.7727
TLE2	0.8332
TLE3	0.7876
TLE4	0.7051
TLE5	0.751
TLH1	0.7834
TLH2	0.8085
TLH3	0.73
TLH4	0.7682
TLH5	0.7399
TLI1	0.6993
TLI2	0.8491
TLI3	0.7956
TLI4	0.7478
TLI5	0.7058

TLM1	0.7798
TLM2	0.769
TLM3	0.785
TLM4	0.843
TLM5	0.8013
Opportunity-enhancing HRM (O-HRM)	
O-HRM1	0.7639
O-HRM2	0.8336
O-HRM3	0.8486
O-HRM4	0.8257
O-HRM5	0.7639
Affective commitment (AC)	
AC1	0.6855
AC2	0.802
AC3	0.8921
AC4	0.3086
Job satisfaction (JS)	
JS1	0.8138
JS2	0.8993
JS3	0.7459
JS4	0.8628

Table 3

Hypothesis	Effect	Path	Path coefficient (β)	t	p
Main effects of the research model					
Hp 1.A	Direct	TL→AC	0.26	2.01	0.047*
Hp 1.B	Direct	TL→JS	0.21	2.17	0.000***
Hp 1.C	Direct	TL→O-HRM	0.58	6.29	0.000***
Hp 2.A	Direct	O-HRM→AC	0.38	4.11	0.000***
Hp 2.B	Direct	O-HRM→JS	0.35	3.37	0.001**
Post-Hoc tests for mediation of O-HRM					
Hp 3.A	Indirect	TL→O-HRM→AC	0.594	4.8	0.000***
Hp 3.B	Indirect	TL→O-HRM→JS	0.643	4.27	0.000***

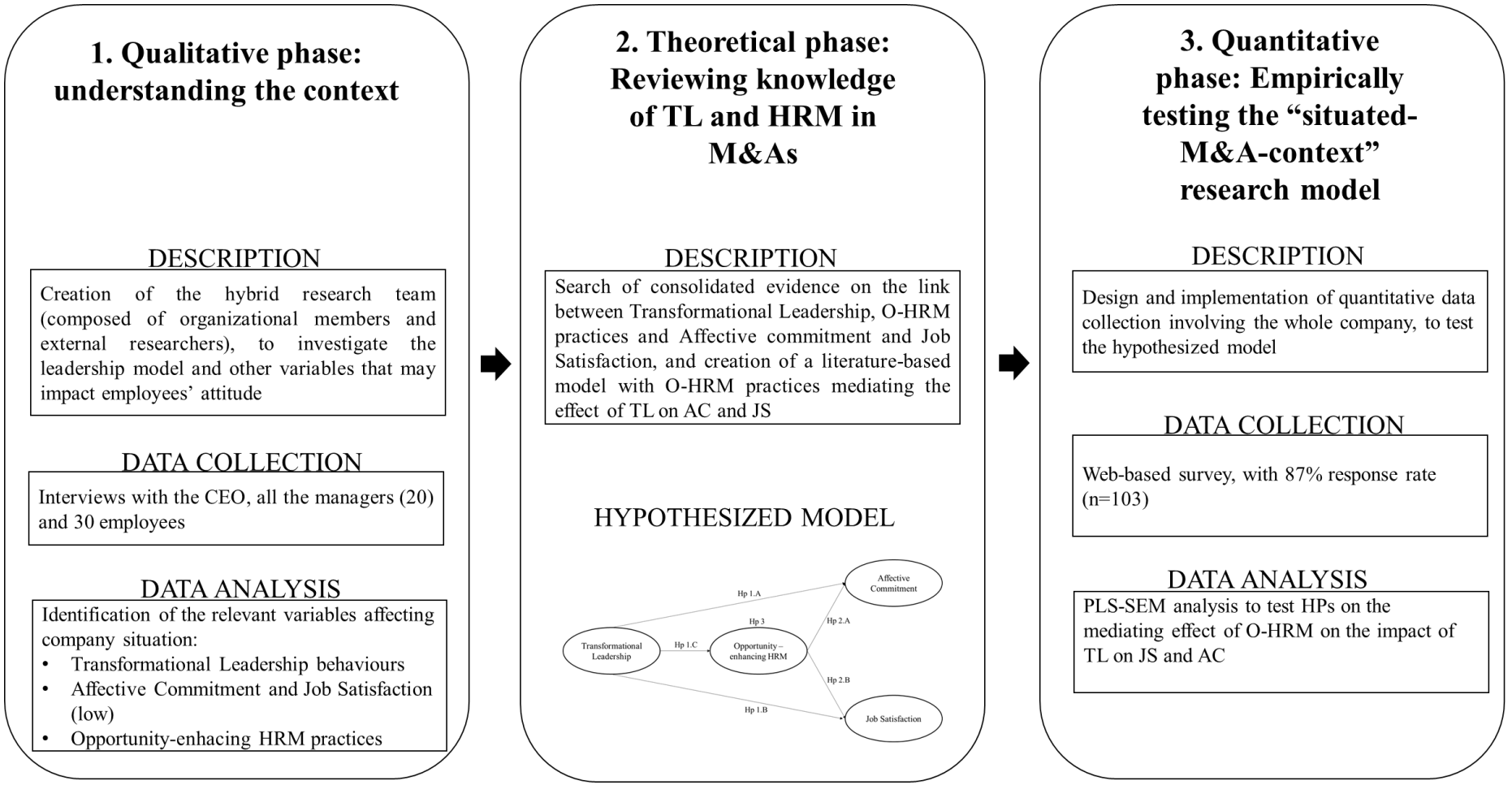

Fig. 1. Phases of the research project

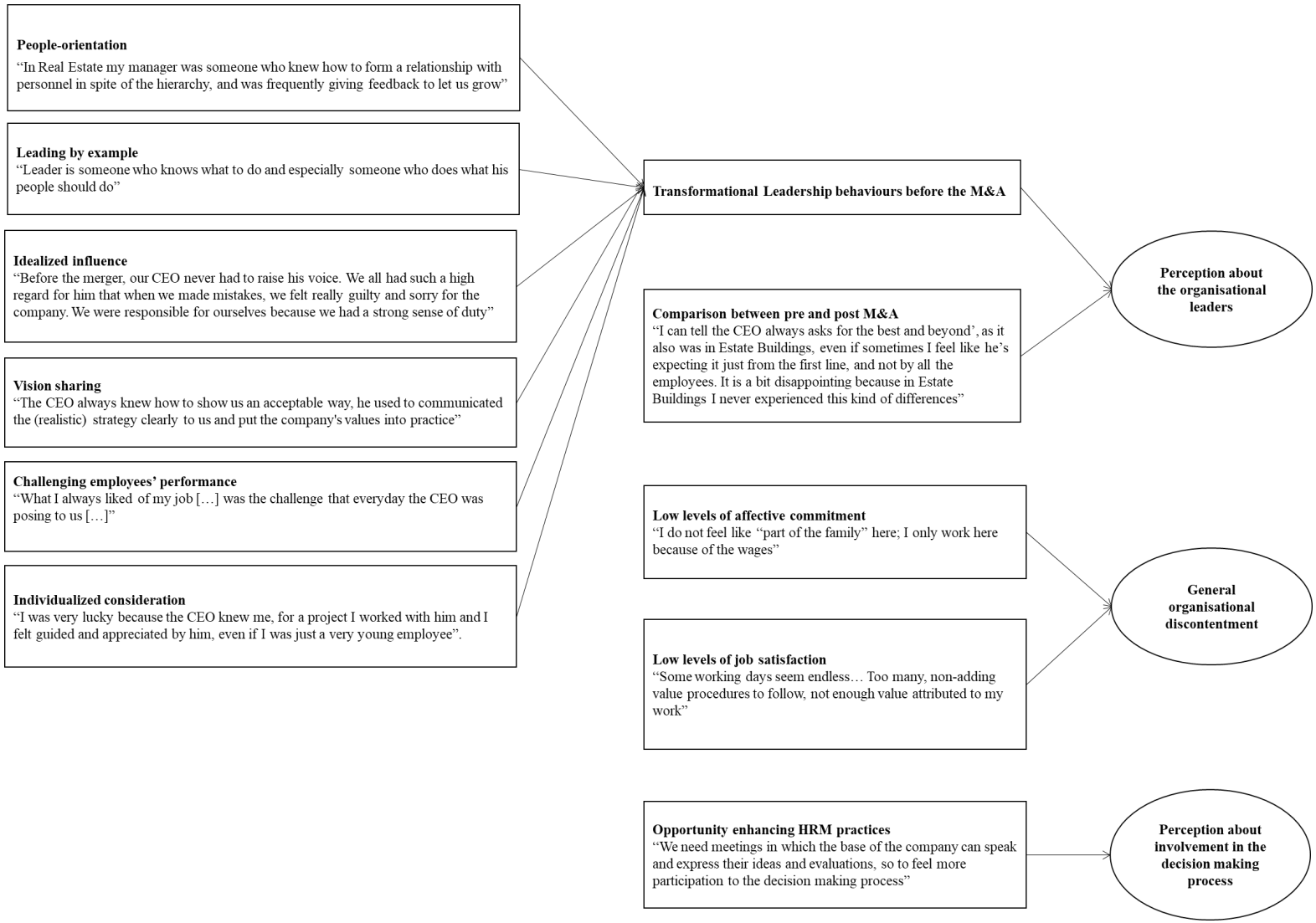

Fig. 2. Qualitative constructs schema with exemplary quotes

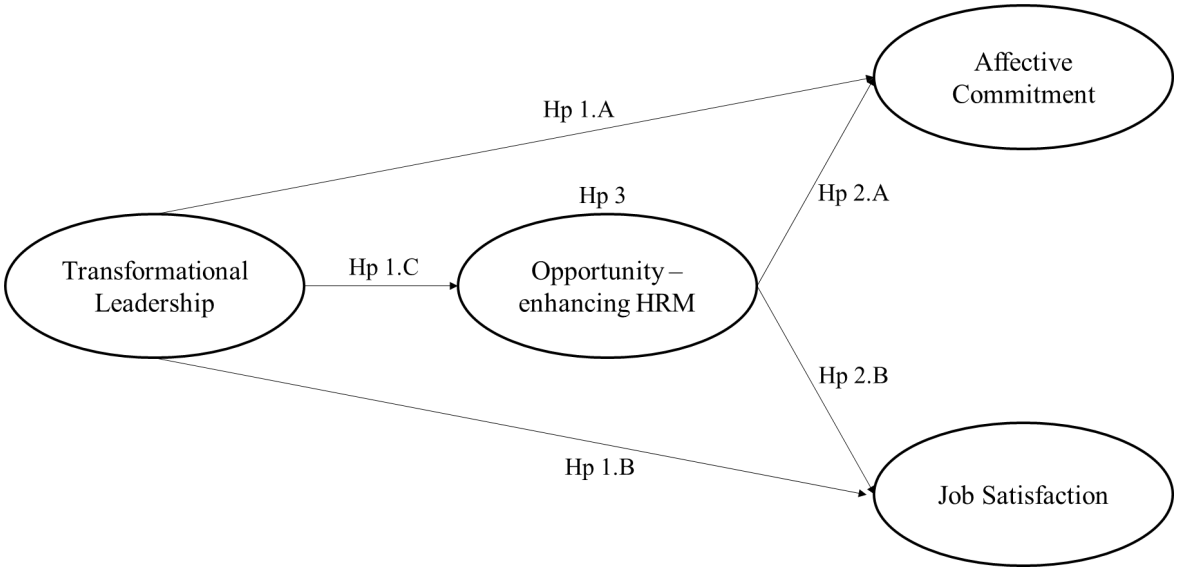

Fig. 3. Hypothesised model