

# A case study of the evolving management of leadership development in the retail banking sector

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**Orientation:** Leadership and its development continue to be an urgent and critical priority for firms. As a field of practice and research, one observes that leadership development continues to be characterised by the failure to achieve its outcomes in spite of the scale of firms' investment in it and the availability of a rich repertoire of developmental methods. Therefore, there is a need to understand how leadership development is configured and managed within firms as a bounded function, as programmes and as learning and development processes.

**Research purpose:** The study explored how leadership development is articulated, configured and managed within the retail banking sector in South Africa; in particular, the retail banks and the Banking Sector Education and Training Authority (BANKSETA).

**Motivation for the study:** There is a dearth of research on how the purpose of leadership development is defined by and within firms and, relatedly, how the management of leadership development has evolved within these organisations.

**Research approach/design and method:** The research comprised a multi-site, qualitative case study that utilised semi-structured interviews at five retail banks, the BANKSETA and the local business school that hosted the BANKSETA International Executive Development Programme (IEDP). Thematic analysis was used for the within and cross-case analysis of the data.

**Main findings:** The study illustrated how the institutional dynamics, contingencies and compromises inform the evolving management of leadership development within organisations. It traced the evolving purposes and the internal and external differentiation of the Leadership Development Centres (LDCs) of the retail banks and the BANKSETA IEDP. These illustrate how leadership development as a function, centre, programme and process is shaped over time. This includes the sampled stakeholders' developing capabilities, their internal and external partnerships, their different positions, and the contestations and integration challenges they contend with.

**Practical/managerial implications:** The study provides insights on the evolving management of leadership development, in particular the capabilities, roles, partnerships and identity work that needs to be grappled with.

**Contribution/value-add:** The research can help practitioners diagnose and manage their firm's evolving capabilities and detail a road map for managing and innovating leadership development.

**Keywords:** leadership development; innovation; partnerships; platform; disintermediation; intermediation.

## Introduction

Leadership and its development appear to be a recurrent, pressing issue for firms in relation to their capabilities to set strategic direction and ensure sustainability (Dongrie et al., 2015; Volini et al., 2019). Global surveys by multinational consultancies have stated that leadership development will remain a future priority for firms given the speed and scope of technological, economic, political, social and demographic changes and the impact thereof on the business landscape (Bersin, 2014; Dongrie et al., 2015; Gurdjian, Halbeisen, & Lane, 2014; Loew, 2015; Volini et al., 2019). This means the pattern of increasing investment in leadership development interventions over time by firms will be sustained, and thus, the concomitant '*proliferation* of leadership development *methods*' (italics added, Hernez-Broome & Hughes, 2004, p. 25) will continue.

In spite of the scale of investment by firms in leadership development interventions over time and the rich repertoire of methods that has developed, there is the persistent theme of the *failure*

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of these developmental interventions and of the *crisis* of leadership and firms in the literature (Gurdjian et al., 2014; Mabey & Morrell, 2011). For example, failure is a prominent theme in the above cited global consultancy surveys and other reviews with C-Suite executives, human resource (HR) executives and staff and other stakeholders (Ready & Conger, 2003). In relation to the crisis, references are made to large-scale firms such as Enron, WorldCom and Lehmann Brothers (Mabey, Egri, & Parry, 2015).

There is the paradox then of the increasing investment in leadership development and an expanding repertoire of developmental methods along with the failure and crisis of leadership and firms. This paradox can lead one to question how leadership development is articulated, configured and managed within firms, and of the related day-to-day organisational and lived realities. It poses the question of how leadership development has evolved and is made manageable *within individual firms*; that is, how it is made organisable, designable and deliverable. This requires a shift from the prevalent development methods-centred focus in the literature, which opens up spaces to explore how the management of leadership development has evolved within firms. For example, exploring how leadership development has evolved and is made manageable within firms as a bounded function, as programmes and as learning and development processes.

## Research purpose and objectives

The study explores the evolving configuration and management of leadership development in the South African context by focussing on a single sector, that is, the banks, and the Banking Sector Education and Training Authority (BANKSETA) within the retail banking sector. Through this, it explores how the tasks and work of managing, designing and delivering leadership development are taken up and managed by these various stakeholders.

## Literature review

The discussion places the debates on methods, contextualisation and customisation within the context of the supply-side and demand-side dynamics, that is, the logic and 'push' from the providers of development programmes and methods as well as the client, demand-side dynamics and 'pull'.

## Method centricity and proliferation (supply-side dynamics)

Over the more than four decades of investment in leadership development in modern firms, a range of methods have evolved, taking on generic, customised and proprietary forms (Dongrie et al., 2015; Henley Business School, 2015; Loew, 2015). This repertoire of methods includes formal curriculum or learning programmes; simulations; coaching, mentoring and 360° feedback; the emergence of corporate universities or in-house facilities; and the introduction of

action learning, immersions and on-the-job learning (Day & Halpin, 2001; Hernez-Broome & Hughes, 2004; Yukl, 2010).

Although each method appears to command its own body of literature and set of best practices and practitioners, there is the 'increasing use and recognition of the potency of a *variety* of developmental *experiences*' (italics added, Hernez-Broome & Hughes, 2004, p. 25). The advantage of variegated experiences could be that the leader-as-learner is presented with different forms of learning and opportunities in a variety of settings and formats. However, variety in itself may not provide the learning, consolidation and application required for the leader. One may need to ask what informs the design of these experiences and the leadership development programmes these are embedded within; and how integrated are the learning process and developmental experiences (Billett, 2014; Day, Fleenor, Atwater, Sturm, & McKee, 2014; Merriam, 2001b; Mulcahy, Cleveland, & Aberton, 2015; Tynjälä, 2008). These are questions of pedagogy, design and the nature and forms of integration.<sup>1</sup> One could suggest that where these and contextualisation are not deliberately addressed then the variegated experiences could be at a disadvantage to the learner.

Although there is a rich repertoire of methods, in practice, it seems that there is the predominance of certain methods and learning delivery systems at certain times (Loew, 2015). For example, coaching and on-the-job learning and development has emerged as the preferred method as well as digitalised learning and its management, such as e-learning, webinars, mobile learning formats and other technology-based mechanisms (Henley Business School, 2015). However, these changing preferences for certain methods and forms of delivery do not address the failure of leadership. This follows from observations that a significant proportion of leaders in firms are either not ready to lead, not leading effectively or failing to lead (Loew, 2015; Gurdjian et al., 2014). This is attributed to the lack of effective contextualisation of leadership development. In contrast, those pointing to a crisis of leadership and organisations argue that leadership and its development are not adequately conceptualised, as it continues to promote acontextual, leader- or individual-centred conceptions of leadership (Mabey & Morrell, 2011).

## Contextualisation and customisation (demand-side dynamics)

The lack of contextualisation refers to 'the assumption that *one size fits all* and that the *same* group of *skills* or *style* of leadership is appropriate regardless of strategy, organizational culture, or CEO mandate' (italics added, Gurdjian et al., 2014, p. 121). The argument is that the same set of leadership methods, themes and programmes cannot be applied uniformly to a given organisation and its strategy, culture and different management layers. It requires customisation to fit the purposes and mandates of the firm. Nor is there a

<sup>1</sup>The case study explores the question of the design and integration of leadership development, wherein instructional and curriculum designs are discussed. However, a detailed discussion on design and integration is beyond the scope of the present article.

uniform set of leadership skills, styles or competencies that these leadership methods and programmes can address (Hollenbeck, McCall, & Silzer, 2006; Probert & James, 2011).

The focus though remains on customisation for the individual manager–leader’s competencies. This focus on leader competencies and styles can be noted in research undertaken with South African samples as well (Baicher, 2005; Botha & Classens, 2010; Pillay, Viviers, & Mayer, 2013). Although the authors variously point out the need to broaden perspective and critically explore the South African context, the focus remains on individual leader competencies and styles. Botha et al. (2010), for example, in their research on management and leadership development in a South African retail bank suggest the need for ‘unique and diverse competencies’ (p. 80) for globalisation, cultural diversity and post-apartheid transformation challenges the banks face. However, they also note that ‘key values of African management [*such as ‘Ubuntu’*] have several similarities to *generic* leadership competencies such as teamwork, supporting and cooperating and impact and influence’ (italics added, p. 80).

There appears to be a tension in Botha et al.’s (2010) framing of competencies as being both unique or context-bound and generic or universal. Here, one could heed the concluding caution of Baicher’s (2005) study to critically explore the different meanings and enactments of competencies by the various actors or stakeholders. A step further, one could critically interrogate the individualistic, decontextualised and universalistic assumptions of leadership and its development that the competency construct leads to; and also ask how the South African context evolves and is socially constructed (Caroll, Levy, & Richmond, 2008; Probert & James, 2011). This then opens the space to explore how the different stakeholders in the various banks attend to and give meaning to their sector and firm’s challenges and context in relation to leadership development. That is, how they make sense and give form to the challenges banks face such as post-apartheid transformation, financial inclusion, equity and socio-economic development as well as the changing basis of competitiveness, business model disruptions and regional and global positioning (BANKSETA, 2006, 2007, 2013; Botha et al., 2010; Coetzee, 2009; Kostov, Arun, & Annim, 2014).

The lack of contextualisation could also be understood as the disconnect between the learning and development within leadership development programmes and the contexts of the workplace. It repeats the historical criticism of business schools for their focus on *academic rigour* at the expense of *business relevance* (Khurana, 2010; Paton, Chia, & Burt, 2014). It poses the question of the relationship between business schools and firms as clients. Relatedly, it asks of the process of customisation within firms and between these firms and the business schools. Thus, it points to the need to explore the supply- and demand-side dynamics beyond the confines of the competency construct and methods-centred focus; and ask how leadership development is made manageable, designable and deliverable.

## Conceptualising and locating leadership and its development

The contextualisation and customisation of programmes and methods as well as the focus on manager–leader competencies do not address the criticisms of the crisis of leadership and organisations. These continue to promote acontextual, individual- or leader-centred conceptions of leadership. Thus, there is a lack of deliberation on the contestations on the loci of leadership and, relatedly, how one delimits the conceptual domain of leadership (Avolio, Walumbwa, & Weber, 2009; Fairhurst et al., 2010; Uhl-Bien, Riggio, Lowe, & Carsten, 2014).

Yukl (2010) described the contrasting definitions and accounts of leadership as ‘reflect[ing] deep disagreements about the identification of leaders and leadership processes’ (p. 3), which are informed by different philosophical and theoretical assumptions and lenses. Day and Harrison (2007; Day et al., 2014) suggested that leadership as a concept is continually evolving and will continue to do so. This follows from its complexity as well as multidimensionality, and the theoretical and empirical observation that leadership constructs can present differently at different levels of analysis and firms. It opens up the question of how leadership development evolves, manifests, is given meaning and is made manageable within firms and in their relationship with business schools and other providers.

## Research design

### Research approach

The generic qualitative methodology (Bergman, 2008; Denzin & Lincoln, 2008; Merriam, 2001a; Patton, 2002) and the case study design (Merriam, 2001a; Yin, 2003) are appropriate for the purpose of the study, as they help explore the varying meanings and perspectives of the sampled stakeholders. It draws out in detail the stakeholder’s perspectives to develop ‘thick descriptions’ of the phenomena being studied.

### Research strategy and method

The research comprises a multi-site, qualitative case study within the South African retail banking sector, which includes five retail banks, the BANKSETA and the local business school that hosted the BANKSETA International Executive Development Programme (IEDP). The research followed Merriam’s (2001) and Yin’s (2003) argument that case study is a research design or strategy in its own right. Merriam (2001) defines case study as ‘intensive descriptions and analysis of a single unit or bounded system [*the case*]’ (p. 21). The purpose of a case study is to elucidate and understand the bounded system. The study utilised semi-structured, qualitative interviews for this purpose.

### Research setting

The research setting comprises the retail banks and the BANKSETA within the post-apartheid retail banking sector.

The sector comprises a number of large and smaller banks. This is in terms of their relative weight of banking assets, retail banking market share and client base (Maredza & Ikhide, 2013). The large 'big-four banks' (p. 1362) are Standard Bank, Nedbank, First National Bank (which is part of the First Rand group) and the ABSA Bank. The smaller banks include African Bank, Capitec Bank, PostBank and UBANK Limited.

The above banks host their own leadership development programmes. Along with these banks' programmes, the BANKSETA funds a sector-wide executive development programme, which aims to focus on historically disadvantaged individuals. The BANKSETA IEDP is hosted at a local business school. It presents a stable, long-standing programme iterated over several years.

The access to the BANKSETA programme hosted at a local business school and to the participating banks provided the researcher an opportunity to conduct an exploratory, sectoral case study. The business school programme managers provided the researcher an introduction by email to the BANKSETA staff and two cohorts of BANKSETA IEDP delegates. The researcher then followed up with the respective persons by email and scheduled interviews with persons agreeing to participate in the research. The researcher also approached and made contact with the heads of the respective banks' leadership development function through email, and telephonically followed up and scheduled interviews with those agreeing to participate in the research.

### Research participants and sampling methods

The research is a multi-site, embedded case study design rather than a single or holistic design; that is, it comprises multiple embedded units of analysis (Yin, 2003). This means specific, embedded sites were selected within the retail banking sector. The case study utilised purposeful sampling within the sector. The sample consisted of the following 31 participants: three senior management from the BANKSETA management responsible for the BANKSETA IEDP; seven senior managers of leadership development at the retail banks participating in the BANKSETA IEDP (comprising the four large banks and one of the smaller banks); 12 delegates from the two cohorts from these respective banks attending the IEDP; two programme managers and six faculty and coaches at the local business school where the IEDP was hosted; and one senior programme manager at the South African subsidiary of an international business school that one of the banks utilised.

### Data collection methods

Semi-structured, qualitative interviews were completed with all the participants from the various embedded units utilising interview schedules. The study initially aimed to utilise mixed-methods research at the different sites. However, the pilot study illustrated, for example, how the quantitative methods would narrow the exploration of the voices and

perspectives of the research participants, especially given the time constraints of the participants and their limited availability to engage in surveys, journaling and/or interviews. More importantly, it highlighted the need to consider the banks' concerns regarding the intellectual property of their customised leadership development and the sharing of proprietary and sensitive information on their leadership and its development to competitors through the research publication.

### Data recording

The researcher recorded the interviews utilising an audio recorder and took notes following a formal consent from the participant. Audio recording helps with the quality of the transcription process and construction of the transcripts (Evers, 2011) given the limitations of the researcher's recollection and notes.

### Strategies employed to ensure data quality and integrity

To attain trustworthiness for qualitative research, the study utilised the triangulation of sources of data, sampling of contrasting and multi-sites and an audit trail and chain of evidence. On transcription, many authors suggested that there is no single standard or convention for it (Evers, 2011; Lapadat, 2000). The transcription strategy utilised depends on the purpose of the research and analysis within the context of time, funding and resource constraints. The transcription of the interviews was done in three phases of quality checks over the period of 12 months to ensure its quality. The third phase also served as a reflective process as per the method of data analysis.

### Data analysis

Merriam's (2001) description of the constant comparative method informed the building of an 'interview log' during the third phase of transcription; the researcher's immersion in the data; the surfacing of 'potentially relevant' (p. 181) segments; the development of an 'outline or classification system' (p. 181) of categories or themes; and noting of emergent patterns with and across themes. The subsequent thematic analysis of the individual transcripts within the embedded units and then across these units provided the within and between case analysis to develop the required thick descriptions.

### Ethical considerations

The research participants were informed that their participation is both voluntary and anonymous, and they formally consented to their participation and recording. The names of the participants and the organisations are not included to maintain anonymity. For this reason, codes and pseudonyms are used. The limits of anonymity for the BANKSETA and business school were discussed with the relevant participants, who consented to their continuing participation within these limits.

## Results

The discussion explores the themes of institutional and individual journeys. These provide insights into how the articulation, configuration and management of leadership development evolved within the retail banks' Leadership Development Centres (LDCs) and the BANKSETA IEDP. The section begins with the institutional journeys and explores the relevant subthemes as illustrated in Table 1. Then, it explores the individual journey and the subtheme of positions the individual stakeholders take up.

### Leadership Development Centres of the banks

#### Competing purposes and the journey of formalisation

The heads of the LDCs (henceforth shortened to HOLDCs) appear to be confronted with competing purposes that arise from contending demands and timeframes within their respective banks. They are meant to address the development of 'future capability' for the nascent changes and disruptions of the 'volatile, uncertain, complex and ambiguous (VUCA)' world while also addressing the present organisational leaders for the tasks of organisational 'alignment' and achievement of 'business results'. They are required to develop pressing organisational 'competency' to help manage the immediate 'business challenges', and at the same time individualise development to address each manager-leader's specific 'gaps' and needs as defined and framed by the bank's competency framework and the leadership pipeline model (Charan, Drotter, & Noel, 2011). These competing and shifting purposes confront them with the question: what does it mean for 'leaders' within the banks to 'liv[e] the values', 'live the culture', 'instil the culture' of the bank and 'lead [*within the particular bank's*] way' as part of realising 'business results', while they also meant to challenge the present and future proof the bank for the VUCA world.

The below extracts provide a sense of the tensions and paradoxes within the HOLDCs' engagement with the above question. They attempt to draw causal relations between leadership, culture and performance with 'leaders' as their lever and leverage:

'[...]we believe that *leadership* drives *culture* that drives *performance*, if you want to change the *culture* of an organisation you've got to change the *leadership*. If you want to change the *performance* of an organisation it's dependent on the *culture* you create which is dependent on the *leadership*.' (HOLDC-1, male, Head of Leadership Development Centre at large retail bank)

**TABLE 1:** Themes and subthemes.

Themes	Subthemes
Institutional journey • Retail banks • BANKSETA	Purposes and formalisation Internal and external differentiation Partnerships
Individual journey • Leadership development managers • Leadership development delegates or participants	Positions

BANKSETA, Banking Sector Education and Training Authority.

'[...] if we get these leaders to start changing and they truly become change agents, we will change the leadership culture in the group.' (HOLDC-2, female, Head of Leadership Development Centre at a large retail bank)

'We're trying to define a culture. We're striving for that. Don't really have it now. We are battling to package it correctly.' (HOLDC-3, female, Head of Leadership Development Centre at a large retail bank)

'[...] bringing about a change in how leadership is constituted, so that's on the one hand and on the other hand transformation, so thinking more longer term for example.' (HOLDC-4, female, Head of Leadership Development Centre at a large retail bank)

'To bring all the other pieces together, it's *alignment* to strategy, again that's important. It is meeting people *where they are at*. It is *not the one size fits all*. There's so many levers that you have to pull to put all these pieces together. I don't think we've got *one* answer for it. We are busy working on a leadership strategy, development strategy for the next 3 years [...] *it's not an easy concept to grapple with*.' (HOLDC-5, female, Head of Leadership Development Centre at a large retail bank)

In the HOLDCs' engagement with the above question, there seems to be the continual negotiation between them trying to find 'space' for 'best practice' in leadership development and their own aspirations, 'stamp' and critical 'perspective' thereof. More importantly, they are constantly navigating and negotiating their bank's 'level of maturity' and 'appetite' in relation to leadership and its development. They need to consider what is 'palatable' to their bank and might bring about possible 'resistance'. This forms part of the formalisation dynamics within their respective banks. This includes the 'challenge[s]' of 'mainstreaming leadership' within the organisation as a whole and the dynamics of formalising leadership development as a function and as the centre for leadership strategy, design and interventions within the banks. There appears to be continual tension between centralisation and decentralisation of leadership development.

The above dynamics play out within the 'hybrid' HR structure that most of the banks appear to subscribe to and wherein the leadership function is located. The structure follows what is commonly (though erroneously) termed the 'Ulrich model' (Ulrich, 2015, p. 25) and comprises 'centre(s) of expertise' or 'centres of excellence', centralised shared services and decentralised HR business partners and services. Some of the HOLDCs point to the tensions within the 'hybrid' structure; for example, the tensions with the business partners or performance management sub-function. While the other HOLDCs caution against leadership development being seen as an 'HR thing' and warns of the 'silos' in the HR structure and functions:

'[...] The culture, the values, everything draws from the leadership point of view. *So where does it sit?* Very interesting and we try and *navigate through those complexities all the time*. [...] No there's *not an easy answer*. *Who owns it?* And that's why I said if you've got a *mandated office* with the CEO maybe it – simpler. But again then it will be given to *training and development to handle*. It will be *given to OD to handle that piece* so it all just *sits all over the place*.' (HOLDC-5, female, Head of Leadership Development Centre at a large retail bank)

### Journey of internal and external differentiation

As the HOLDCs grapple with the implications of the competing purposes for the design and management of leadership development, these managers also wrestle with internal organisational dynamics and the evolving capabilities of the LDCs. They appear to define these capabilities through external and internal differentiation. They externally differentiate themselves from the business schools given their very location and perspective within the banks and attendant focus on the 'alignment', 'standardisation' and 'customisation' of leadership development to their banks' purposes. This includes the opportunity to use digital and experiential modalities and various development methods and techniques outside of the traditional classroom or seminar. They frame the business school as being 'academic', 'cognitive', 'classroom-based' and focussed on 'South African Qualifications Authority (SAQA) compliance'. Thus, they seem to invoke the traditional binary between academic *rigour* and business *relevance* (Furlonger, 2015a, 2015b; Khurana, 2010) that plagues discussions on business schools locally and internationally.

The LDCs' alignment, standardisation and customisation evolve as their internal capabilities and the differentiation of these develops over time. The internal differentiation can be distinguished as lines of development that the HOLDCs describe as 'operational', 'programme', 'strategic' and 'design'. These suggest changes in the configuration of the LDCs. The *operational* line means the consolidation of a 'project office'; a 'well-oiled machine', which has 'battered down' an efficient 'administration', 'logistics' and 'infrastructure' for procurement, scheduling and management of programmes. The *programmatically* line entails the formalisation of a 'centre of expertise' or 'centre of excellence' that 'tie[s] everything together end to end' to create an 'overall journey' and 'learning integration'. The *strategic* line concerns the development of internal consultancy capabilities, and consequently, the 'alignment' of leadership development and its 'link back to' the business 'strategy'. This also means engaging with the question of the 'meaning' of 'leadership' and the 'future of leadership development' within the bank. In the *design* line, there is the deliberate aspiration for a more open, relational, collaborative and dynamic forms of designing, developing and delivering leadership development. The whole leadership strategy and function and the intended nature of programmes and interventions are reimagined. Different forms of partnerships for 'co-design[ing]' and 'co-creat[ing]' leadership development emerge as a core theme here.

However, these are neither clear-cut phases or transitions from one line of development to the next nor do they imply a unidirectional evolution or singular trajectory in a vacuum. For example, one of the heads of an LDC states that, although one may conceptually differentiate these lines of development or 'point of view[s]', one needs to take a holistic perspective of the operational, programmatic, strategic and design facets

of the leadership development function. The 'success of your programme lies in how well you've rolled it out, and how well it's landed, how well it's been implemented' and how well it speaks to the different 'business demands'. Along with this holistic perspective of the function, we need to also attend to how leadership development is presented to, and enacted within, the organisation. For example, one of the HOLDCs describes how 'leadership development' is made 'palatable' to the bank as pieces of 'talent development', 'succession' and 'sustainability' rather than as broad-based 'transformative work'.

Furthermore, one needs to consider how, as these different lines of development unfold, the internal reconfiguration of the LDC transforms in tandem. For example, in one of the banks, the programme 'facilitators' are now serving as 'learning integrators' within and across programmes as the LDC's strategic and design capabilities develop. This and the discussion on the evolving LDC opens up the question of how leadership development is integrated and the locus thereof. This locus is in part influenced by how the LDC and banks delimit the locus of leadership. Most prevalent is individualistic, leader-centred conceptions of leadership. However, the HOLDCs do speak about broadening their own and their organisation's conceptualisation of leadership, shifting to decentred, distributed and networked understandings and development of it.

The above internal dynamics do not occur in a vacuum. There is a dynamic relation between their external and internal differentiation. Thus, one finds the shift from seeing the business school as too 'academic' and focussed on 'SAQA compliance' to being a space and means to challenge insular, organisational mindsets and assumptions. This includes challenging their respective bank leaders' sole focus on, and solution-seeking for, their *immediate* 'business challenges' and financial performance. They call for a change in the partnerships with the business schools to 'create a different model and a different level of thinking'.

The below excerpts give a sense of the day-to-day negotiation of the competing purposes, different demands from the many line-functional management, the many emergent contingencies and constraints, and the LDCs' internally developed capabilities from external and internal differentiation. For the first quoted HOLDC, it means 'compromising' on the positioning and practice of leadership development:

'And sometimes I'm under time pressure, you know I've got to design a programme in 3 months, actually don't have the time to design to the extent that I would like to. [...] I'd really like to do some really, really intense transformative stuff, but it invariably ends up being moderated down [...] it ends up looking like a mini MBA which is really, really not what I want to do and I feel like I compromised myself in producing something like that.' (HOLDC-4, female, Head of Leadership Development Centre at a large retail bank)

'And I only exist to the extent that there's demand for the programmes that I create.' (HOLDC-4, female, Head of Leadership Development Centre at a large retail bank)

'[...] biggest challenge always is that what I'm putting in place, does it have the right impact. Will it help the business move forward? Will it help the development of that individual? Those are always the big strategic challenges that we face. And the underlining challenges that go with that is stuff like are we using the right vendors? Do we have sufficient budget? Are we involved in the right programmes? Are we getting the return on the investment that we are looking for? Are we getting the output that we require? And what is that output?' (HOLDC-5, female, Head of Leadership Development Centre at a large retail bank)

## Banking Sector Education and Training Authority International Executive Development Programme

The BANKSETA IEDP, launched in 2005, illustrates a similar pattern of external and internal differentiation as with the banks' LDCs. However, in the case of the BANKSETA, they differentiated their IEDP from that of the leadership development programmes of the local banks. In addition, their internal *programme* capabilities developed as their framing of their purpose evolved together with their partnerships with international, local and then continental business schools and their international and later continental networks in Africa. These capabilities involved the selection of delegates to the IEDP, the logistics of onboarding the delegates to the programme from the respective banks and its design and delivery in collaboration with the various business schools.

Table 2 provides a chronological and thematic summary of the pattern of external and internal differentiation for the

BANKSETA IEDP. It illustrates how the BANKSETA's purposes, capabilities, networks, partnerships and programme evolved together over the years.

## Partnerships and positions

One of the thematic threads through the discussions on the design, delivery and management of leadership development is partnerships. This is clearly seen in the discussion on the banks' LDCs and the BANKSETA IEDP, which illustrates how partnerships evolve with their external and internal differentiation. This includes how they frame and see their organisational boundaries. For example, with their evolving capabilities, in particular along the strategic and design lines of development, one finds the heads of the banks' LDCs calling for a reconfiguration to 'create a different model and a different level of thinking'. They now seek to 'co-design' and 'co-create' leadership development with the business schools and other providers. This reconfiguration and the call to 'co-design' and 'co-create' require the stakeholders to understand the different positions that they take up with regard to leadership development. Understanding these positions may help them clarify implicit assumptions, expectations, role conflicts, competing task demands and consequently identity issues that they bring into, and that emerge within, the partnerships. Table 3 provides a summary of the positions the HOLDCs (as managers of the LDCs) and business school programme managers and faculty take up and the related aspects of the leadership journey of the delegates. The themes are drawn from those that emerged from the interviews with the HOLDCs, business school programme managers and BANKSETA IEDP delegates.

**TABLE 2:** Evolving Banking Sector Education and Training Authority International Executive Development Programme.

Year	Milestones in the BANKSETA IEDP evolution
2000	Formal launch of the BANKSETA and other Sector Education and Training Authorities (SETAs).
2004	Formal launch of the Financial Sector Charter (FSC); a voluntary agreement that the finance and banking sector stakeholders signed in 2003 on a post-apartheid transformation framework and principles for the banking industry (Financial Sector Charter Council [FSCC], 2003).
2005/2006	To support the FSC, and as part of the transformation agenda of the BANKSETA, an IEDP 'fact-finding mission' is conducted to help address equity in the development for, and employment in, senior and executive management levels at the banks (BANKSETA, 2006; TFSA, 2007). Following the fact-finding mission, a pilot and then a formal IEDP programme is launched in a partnership between the BANKSETA, the Toronto Financial Services Alliance (TFSA) and Immersion Lab (a consultancy in Canada).  The IEDP is firstly hosted in Canada where the delegates attend a <i>set curriculum</i> at the Rotman Business School and Schulich Business School. In their international visits and <i>immersions</i> , the delegates engage with key stakeholders at The Bank of Montreal Leadership Centre, Canadian Imperial Bank of Commerce (CIBC), Canadian Bankers Association and the TFSA. Delegates attended preparatory workshops on <i>action learning</i> , at a South African Business School, 'for working on the three research topics set for them by the sector' (BANKSETA, 2006).
2007/2008	A new BANKSETA CEO is appointed whose tenure continues to 2016/2017  In the 'midst of [post-Apartheid] transformation', there is the continued evolution of the BANKSETA programmes in a <i>quantitative</i> and <i>qualitative</i> manner. This included: (1) expanding of partnerships locally, regionally, continent-wide and globally; (2) expanding and diversifying the international exposure, visits and 'immersions'; and (3) 'customis[ing]' the content of the IEDP. These were informed in part by what was seen as 'relevant' at the time and through the engagements with many stakeholders through conferences, meetings, formal visits and formal engagements afforded to them as an SETA.  The above quantitative and qualitative changes then included: (1) expansion of the base of the IEDP beyond Canada with the introduction of a second IEDP hosted in the United Kingdom at the Cass Business School; (2) the substitution of Canada for a European base thereafter at the Rotterdam Business School; and (3) joint ventures and partnerships with South African Business Schools for anchoring the IEDP UK and Europe. The BANKSETA positions the IEDP as achieving 'synergies' and 'economies of scale' for the sector. This follows from its access. As the BANKSETA CEO states, ' <i>we are not competitors with any bank, we have access to Citi Bank, JP Morgan[,] Freddie Mac and Fannie Mae and people like those in the [United] States</i> ' (italics added).
2010	There is the formal differentiation of the IEDP into two programmes 'anchor[ed]' at different South African business schools, one focussed on retail banking and the other on investment banking. This leads to the refinement of the <i>content</i> of the two differentiated IEDPs and attendant change in the <i>institutions</i> for the international visits.
2011–2016	The customisation continues into the present with the refinement of the IEDPs' <i>content</i> and <i>process</i> . The programme managers at Delta Business School (pseudonym for the local business school hosting the retail-banking-focussed IEDP) redesigned and reshaped the IEDP they 'inherited'. They positioned it as a 'personal development programme' and reimagined the international leg of the programme as 'field challenges' that would enable 'experiential learning'. This was informed by the business school's 'relational' 'philosophy of learning'.  The building and formalisation of partnerships and immersions with African business schools and institutions in support of the African Agenda.  The 'blend[ing]' of both banking and non-banking institutions for the international visits. For example, Google, Sony, Apple and Blackberry are seen as relevant for strategic positioning and potential disruption of banks.

BANKSETA, Banking Sector Education and Training Authority; IEDP, International Executive Development Programme.

TABLE 3: Evolving positions.

Heads of the Leadership Development Centre and business school programme managers	Banking Sector Education and Training Authority International Executive Development Programme delegates
<p><b>Developmental guide</b> In this position, the bank and business school managers work with the delegates and navigate with them their 'developmental journey'</p>	<p><b>Developmental journey</b> The delegates' experience of their developmental journey and distilling and 'connect[ing]' with leadership</p> <ul style="list-style-type: none"> <li>• They realise that leadership development is a 'process'. At first, they are not 'see[ing] the wood for the trees' and wandering or 'lost at sea'</li> <li>• They distil, 'boil down' and 'connect' with 'leadership'</li> <li>• For some, they experience an 'inflection point' or pivot in their understanding, practice and identification with 'leadership'</li> </ul>
<p><b>Critical-reflective professional</b> The managers attempt to maintain professional 'critical distance' while working from within organisational 'space[s]'</p>	<p><b>Navigating organisational realities</b> The delegates navigate and negotiate leadership within their respective organisations</p> <ul style="list-style-type: none"> <li>• The delegates wrestle with the 'gritty' realities of 'managing' and 'leading'</li> <li>• These trials and tribulations 'humble' them and unravel the idealised 'hero' myth they held</li> <li>• They shift in seeing leadership as relational and grapple with personal 'boundaries' as they negotiate their agency as 'leaders' and develop the agency of their teams and within the organisation</li> </ul>
<p><b>Pragmatic practitioner</b> In this position, the managers 'articulate', and give form and structure to their organisation's formal purposes, 'needs' and requirements. For the business school managers, it is their client organisations' needs and that of the school</p>	<p><b>Negotiating identities and place</b> The delegates negotiate their identity work within the bank's strategy, culture, talent management and leadership pipeline</p> <ul style="list-style-type: none"> <li>• The delegates struggle with not 'being bound by the organisation' in their leadership journey and the identity-work entailed therein.</li> <li>• One delegate states: 'I need to define who I am above the organisation'</li> <li>• Post-programme the delegates also seek out a 'platform' or space within the organisation for their continuing developmental journey</li> </ul>

LDC, Leadership Development Centre.

## Discussion

The primary aim of the study was to explore how the articulation, configuration and management of leadership development have evolved within the retail banking sector. This provides insight into the day-to-day realities of leadership and its development within organisations, as there is a dearth of research on the many purposes and actual management of leadership development within firms and within the South African context.

### Evolving leadership development and human resource journeys

The study illustrates that leadership development is shaped by competing and shifting purposes, and that its management as a programme, function and LDC, and the firms it is undertaken within, are not static. They are continuously evolving and entail dynamic internal and external relations (with push and pull dynamics) and attempts at the alignment of leadership, culture, performance and business strategy. These layered institutional and individual journeys, at different levels of analysis, include the formalisation and institutionalisation of leadership development. An aspect of this is the location and embedding of leadership development within the HR management and development function.

There are two possible avenues for exploring the journeys of leadership development and HR. The first concerns the question of how leadership development and the HR

sub-functions evolve, separately and together, and the ways they may align or not. Here, we could draw on the debates on the best fit and coherence of HR practices and sub-functions (Becker, Huselid, Pickus, & Spratt, 1997; Choi, 2014; Garavan, Watson, Carbery, & O'Brien, 2015; Huselid & Becker, 2011). Their argument is that fit and coherence is necessary both internally as a bundle of HR practices or HR system and externally with the firm and its business strategy. In this regard, the case study helps illustrate the dynamics, tensions and paradoxes in the attempts by the LDC management to achieve *internal fit* within their 'hybrid' HR structure as well as *organisational* and *strategic fit*.

This brings us to the second avenue. We can locate the above question and the discussion on the LDC journey within the debates on the strategic value, roles and organisation of the HR function. In particular, David Ulrich's proposal for HR given the global prevalence of the 'Ulrich model' (Ulrich, 2015, p. 25) and the banks' instantiation of it in its 'hybrid' HR structure (Hird, Marsh, & Sparrow, 2009; Pritchard, 2010; Keegan, Bitterling, Sylva, & Hoeksema, 2018; Ulrich, 2015; Ulrich, Younger, & Brockbank, 2008). It raises two issues. Firstly, following Hird et al. (2009), we need to weigh up the level of readiness and competence of the HR teams and function to implement Ulrich's proposals. Secondly, we need to attend to how consulting companies interpreted and translated Ulrich's research and proposals into *structural* plans for firms. That is, how they translated the ways HR can deliver strategic value into a fixed structural design that is

commonly though erroneously referred to as the 'Ulrich model' (Ulrich, 2015, p. 25). This opens up the possibility of reimagining the dynamic configuration of the HR function and the LDC as their capabilities mature, including how the tensions and paradoxes within this configuration and between various HR practices are enacted and worked through across organisational spaces and time. Here, one could also consider how the continual tensions and paradoxes of centralisation and decentralisation are played out and negotiated.

### Forms of leadership and learning and creating space

As the programme, function, LDC and managers thereof evolve, they shape how formal, informal and non-formal learning takes shape and is facilitated and prioritised. In this way, they delimit the learning content, process and spaces as well as open up these as they develop and mature in their configuration and internal capabilities. The notion of learning spaces helps locate this understanding of leadership development within the broader debate on pedagogic space (see Jivan & Paile, 2019) and the interdisciplinary debates on the 'spatial turn' (Soja quoted in Kostogriz, 2006, p. 176) in the various fields of the social sciences. It leads to an appreciation of space as socio-material realities, which are multi-faceted and comprise the material, structural, institutional, relational, discursive and experiential.

This allows for the critical examination of contexts as the effects of socio-material realities and practices, rather than assuming that it is 'pre-existing' (Edwards & Miller, 2007, p. 269). Together with the above understanding of leadership development as continuously evolving and dynamic, it suggests the need to interrogate how organisations frame, undertake and manage the 'contextualisation' of leadership development. It also opens up for exploration the locus of learning and learning spaces, as leadership and its development matures. For example, consider the shifting locus in the use of teacher and learner-centred modalities; the practices of pedagogy, andragogy and heutagogy (and the attendant conceptions of individual autonomy and dependent, guided and self-directed learning); and the incorporation of the workplace in the formal learning within programmes (Merriam, 2001b; Sandlin, Wright, & Clark, 2013).

As one explores the locus of learning and spaces thereof, one could also explore the contestations on the locus of leadership as it and its development matures – from being leader-centred to being more decentred, distributed, shared and network-based. Day (2001) and Day and Halpin (2001) have argued for the differentiation of *leader* and *leadership* development; and Day and Harrison (2007; Day et al., 2011) later provided a model of 'levels of complexity' (2007, p. 361) of leadership and an attendant multilevel approach to leadership development. Petrie (2011) similarly suggested that there is global 'transition occurring from the old

paradigm in which leadership resided in a person or role' (p. 6) to a 'new [*paradigm*] in which leadership is a collective process that is spread throughout networks of people' (p. 6) within organisations.

### Reimagining capabilities – Partnerships, intermediation and disintermediation

The call by the HOLDCs to 'create a different model and a different level of thinking', and 'co-design' and 'co-create' leadership development, suggests the need to reimagine partnerships, organisational boundaries and the capabilities these require. To help reimagine these, one could draw analogies to the current debates on technology platforms and platform strategies. The first analogy one could draw is to the present debates on proprietary, commercial platforms that serve the role of *intermediation*. For example, one can cite Facebook, Uber and Airbnb as examples of intermediaries (Van Alstyne, Parker, & Choudary, 2016). In this case, the platform serves as an intermediary within an ecosystem comprising a network of consultants, facilitators and other providers of leadership development serving as 'intellectual free agents [*as well as their*] corporate clients' (World We Work In, 2015, p. 2). It is argued that this helps 'integrate divergent management disciplines, research areas, and learning methodologies' (Anderson & Van Wijk, 2010, p. 550) to address client needs and 'customize and innovate beyond the boundaries of a single institution' (Anderson & Van Wijk, 2010, p. 550). Thus, the locus of integration here is the client needs and the expertise that needs to be brought together to answer these needs.

The second analogy one could draw, at the other end of the spectrum to intermediation, is *disintermediation* and *decentralisation*. Here, one could cite the emergence of distributed ledger and associated technologies (such as block chains) that obviate the need for intermediation. These are meant to enable unmediated peer-to-peer interaction and token-based value exchange and economies, as well as the possibility of decentralised forms of organisation and self-sovereign or decentralised digital identities (Rauchs et al., 2018). Those leading disintermediation and decentralisation point out the dangers of centralised platforms and services such as Facebook who capture and monopolise users and their data, and as intermediaries set out (overtly and covertly) the protocols or 'rules' for everyone and define and shape what is possible.

Centralised platforms and services will be an anathema to the decentred, distributed, shared and network-based conceptions of leadership; and for the emergent and process-based understanding and development of leadership. Disintermediation and decentralisation through distributed technologies, token-based economies, decentralised forms of organisation and self-managed, decentralised digital identities may be more amenable and enabling for these forms of leadership and their development. These could provide an alternate platform for the emerging and multifaceted partnerships between the banks and their academic and other

leadership development partners; and the boundary spanning between the supply and demand sides.

However, the exact form and mechanisms this platform can take are not clear and these particular technologies and the concepts of disintermediation and decentralisation still need to mature. Presently, it appears that disintermediation and decentralisation are defined negatively as 'not intermediation', which means that the frame of reference is the present forms of intermediation rather than a complete reimagining of these as well as the firms and the value chains and ecosystems they are embedded within. For the moment, though, we could consider how the other established fields of technologies and innovations are presently aligning: from digitalised learning and its management (including e-learning platforms, massive open online courses and the modularisation of learning content, and learning management systems) to artificial intelligence (specifically machine learning) and the cyber-physical systems of the fourth industrial revolution.

## Positions and identity work

The discussion on positions highlights the need to attend to the identity work of both the managers of leadership development and the delegates, and brings another dimension to the debates on it. It draws attention to the spatiotemporal and institutional setting of identity work. It has similarities with the findings of Pritchard (2010) on the 'identity-work' (p. 177) of HR practitioners, especially with HR positioning itself in a strategic partnership with line and executive management in accordance with Ulrich's proposals. Pritchard observes that 'HR practitioners identify with a variety of roles and claim to operate differently in relation to a range of HR issues' (p. 176). This negotiation of roles entails an 'active engagement' (p. 176) with their 'self-identity' 'constructions', resulting in shifts in their view of their profession and their own professional identity. Caldwell's (2004) research likewise found that the HR practitioners are 'pragmatic realists' (p. 202) rather than 'purists', when working with and through the 'inner tensions of HRM', and 'reactive pragmatists' (p. 203) in the 'day-to-day'

**TABLE 4:** Practical suggestions for Leadership Development Centres and their partners.

Leadership Development Centre	Business schools and other providers
<p><b>Evolving management</b></p> <p>Managing the mandate and formalisation of leadership development:</p> <ul style="list-style-type: none"> <li>Establishing or entering and repositioning an existing LDC are both a process. They require ongoing, (re)defining and (re)formalising of the mandate and configuration of leadership development. This means navigating and negotiating:               <ul style="list-style-type: none"> <li>the structural, cultural and political landscape of the firm</li> <li>dynamics such as centralisation–decentralisation and standardisation–customisation, which play out within the HR structure and broader firm</li> <li>dynamics regarding alignment, standardisation and customisation</li> <li>maturity and internal capabilities of the LDC as well as that of the firm</li> </ul> </li> <li>Day-to-day management is a continual negotiation of institutional and practical realities and contingencies. Identify and manage the tensions and paradoxes resulting from competing and shifting purposes of leadership development.</li> <li>Understand how the firm espouses and enacts the causal relations between leadership, culture and performance; and manage the continual negotiation between the firm's purposes, best practices and one's own critical perspective as a manager of leadership development</li> </ul> <p>Journey of internal and external differentiation:</p> <ul style="list-style-type: none"> <li>Deliberately identify the value of the LDC and its role by plotting the current LDC on the various lines of development identified in the study. Prepare for a journey with trials, tribulations and many trade-offs with no clear-cut linear formula that one can follow.</li> <li>Clearly differentiate the current and future value and capabilities of the LDC from the business schools and other partners. Plot how the LDC's internal capabilities and partnerships should evolve over time.</li> <li>Plan and execute the shift in roles and identities of the LDC staff as the LDC capabilities evolve and transform.</li> <li>The bottom line measurement by the firm is how well the LDC rolls out and lands the various developmental interventions. Ensure fit to the firm's level of maturity, appetite and funding.</li> </ul> <p>Innovating leadership development:</p> <ul style="list-style-type: none"> <li>Using the identified lines of development identify how partnerships, organisational boundaries and capabilities are evolving and how these can be reimagined. Consider the analogies of intermediation and disintermediation to help reimagine these, especially given references to the VUCA world, to which one could add disruptive innovation of business models and from the fourth industrial revolution.</li> <li>Identify how learning and learning spaces are currently provided and deliberately design and create learning spaces in line with changing LDC capabilities and shifting competitive landscape, business models and forms of organisation.</li> </ul>	<ul style="list-style-type: none"> <li>Provide forums for clients to identify and share emergent trends and provide frameworks to understand and manage future forms of firms, organisations, business models and competition</li> <li>Provide sectoral-level and cross firm insights on institutional and practical issues, including leadership, culture and performance</li> <li>Serve as a sounding board and challenge organisational mindsets, insular perspectives and comfort zones of clients</li> <li>Develop partnership models and best-fit leadership development in relation to LDC's capabilities and firm's competing demands</li> <li>Provide insights on platform strategies, intermediation and disintermediation</li> <li>Research further to build scenarios on future forms of partnerships, capabilities and boundary spanning</li> <li>Provide a platform for debates on pedagogy, curriculum and learning spaces</li> <li>Challenge functional and organisational mindsets of delegates as well as their comfort zones</li> </ul>
<p><b>Design</b></p> <p>Evolving design:</p> <ul style="list-style-type: none"> <li>Identify the firm and one's personal approach to design.</li> <li>Consider that the approach to design in firms can evolve over time from being a static, solitary or cognitive activity to being an embedded and collaborative process. As the capabilities of the LDC evolve, the way design is approached can shift. For example, shifting to co-creating and co-designing leadership development with partners internally and externally.</li> <li>Consider how the purposes, capabilities, networks, partnerships and programme design evolve together over time. The BANKSETA IEDP can serve as an illustrative example.</li> </ul> <p>Designing and the creation of spaces:</p> <ul style="list-style-type: none"> <li>Understand the various positions one takes as a manager of the LDC and whether one takes a purist, realist or pragmatic approach in these positions.</li> <li>Understand how these positions influence the negotiation of the different roles the LDC plays, the trade-offs thereof and the spaces these can create or not.</li> </ul>	<ul style="list-style-type: none"> <li>Research and provide insights on design and integration, including instructional and curriculum design</li> <li>Map and unpack differences in approach to design to provide client–firms insights and the value that can be provided to them</li> <li>Map and unpack the positions the HOLDCs take up and that the partners take up and how these can provide variegated experiences that are enriching and developmental for delegates and their respective firms</li> </ul>
<p><b>Delivery</b></p> <ul style="list-style-type: none"> <li>The delivery of leadership development does not occur in a vacuum. Understand and prepare for the continual negotiation of competing purposes and how the capabilities of the LDC and partners influence delivery.</li> <li>Map out the different positions taken as the LDC manager and the related position of the delegates of development programmes to help clarify the implicit assumptions, expectations, role conflicts and identity issues that play out in the design and delivery of leadership development.</li> <li>Use these in customisation and contextualisation considerations in the design and delivery, and for thinking about the integration challenges in relation to the varied developmental experiences within programmes.</li> </ul>	<ul style="list-style-type: none"> <li>Collaborate with clients and help articulate the delivery and learning spaces that need to be created with the evolving partnership models, capabilities and boundary spanning.</li> <li>Provide insights on role conflicts and identity issues and managing these.</li> <li>Collaborate with managing the tensions between customisation and contextualisation, and challenging organisational assumptions and mindsets.</li> </ul>

BANKSETA, Banking Sector Education and Training Authority; IEDP, International Executive Development Programme; HOLDC, heads of the Leadership Development Centre; LDC, Leadership Development Centre.

(p. 203) operations. This distinction of practitioner pragmatism can help develop a more granular understanding of how they take up and negotiate the discussed positions.

## Practical implications

The study offers insights into how leadership development evolves within firms as a bounded function, centre, programme and learning and developmental process. This can help firms and their managers of leadership development to compare, diagnose, anticipate and manage their leadership development. It could also help business schools and other providers of leadership development to diagnose, anticipate and manage client firm's competing needs and demands. Table 4 provides practical suggestions in terms of the evolving management, design and delivery of leadership development.

## Limitations and recommendations

Although providing insights from the perspective of the leadership development managers, the purposeful sampling is limited as it does not include the voices and perspectives of other stakeholders, such as the banks' HR, line and executive management, and delegates who did not attend the BANKSETA IEDP. A broader sample could provide a richer and holistic 'picture' of leadership development within organisations. The use of semi-structured interviews limited the study to the participants' narrative accounts of their lived experience. The use of participant observation during actual programme design and delivery, for example, could provide richer data and thick descriptions thereof. Where time and resources are not limiting, the possibility of ethnographic studies could also be considered. This could allow the researcher the exposure to the operational and strategic aspects of the business as well as the day-to-day functioning within HR and the LDC. The constraint to be considered is the concerns of the firms regarding their intellectual property, competitive advantage and sharing of sensitive HR and talent data.

## Conclusion

This study identifies the need to shift from a methods focus and centrality to explore how leadership development evolves as a bounded function, programme and learning and development process. It explores how the purpose, capabilities and configuration of leadership development evolve over time within a single sector. In this way, it opens up further avenues for research on leadership development and provides a road map for practitioners to diagnose, understand and manage their present capabilities and deliberately plot ways to innovate leadership development.

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## Author's contributions

I declare that I am the sole author of this research article.

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