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MASTER'S THESIS

THE ELEMENTS OF A SUCCESSFUL EXPERT-TO-LEADER ROLE CHANGE

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Sara Ripatti

Supervisor/1st examiner: Professor Paavo Ritala

2nd examiner: Associate professor Mika Vanhala

ABSTRACT

Author: Sara Ripatti

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This qualitative thesis examines the success factors of expert-to-leader role change. It is common that individuals in expert position in working life are given leadership tasks or a whole new managerial position at some point during their career. Expert role and leader role are very different from each other, and many experts face hurdles when expected to play the leader role. With an analysis of six interviews and the help of two frameworks, this thesis addresses the elements that influence on the success of the role change. The findings of empirical analysis suggest that the elements of expert-to-leader role change can be viewed from three perspectives, all equally important: inherent environment of individual, organizational environment and social environment. These elements are in place in every expert-to-leader role change, but the content and personal importance of them varies between each individual. The main finding highlights the importance of organizational support, personal features of the individual and experiences gathered during the career. As individuals possess different capabilities and experiences, organizations can even out the differences and guide the role change with support. The outcomes of this thesis align with literature and therefore verify the existing studies regarding this field of research. Additionally, this thesis offers general awareness of the elements that influence to the success of the role change and gives insights to the individuals undertaking the hurdles of expert-to-leader role change.

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Tämä laadullinen pro gradu -tutkielma tarkastelee menestystekijöitä, jotka vaikuttavat roolivaihdokseen asiantuntijasta esihenkilöksi. On tavallista, että asiantuntijoille annetaan esihenkilötehtäviä tai kokonaan uusi titteli esihenkilönä. Koska asiantuntijan ja esihenkilön roolit poikkeavat toisistaan melko paljon, asiantuntijat kohtaavat ongelmia, kun heidän oletetaan toimivan esihenkilön roolissa. Asiantuntijasta esihenkilöksi -roolivaihdoksen menestymisen edellytyksiä tutkitaan tässä tutkielmassa kuuden haastattelun ja kahden eri viitekehyksen avulla. Tutkimustuloksista ilmenee, että roolivaihdosta voidaan käsitellä kolmesta yhtä tärkeästä näkökulmasta: henkilön sisäisten tekijöiden, organisaation, ja sosiaalisen ympäristön näkökulmasta. Nämä elementit toistuvat kaikissa asiantuntijasta esihenkilöksi roolivaihdoksessa, mutta niiden sisältö ja tärkeys roolivaihdoksen suorittajalle vaihtelee. Tutkielman päälöydös viittaa organisaation tuen tärkeyteen, roolin vaihtajan sisäisiin tekijöihin ja työelämästä kerättyihin kokemuksiin. Koska yksilöillä on erilaisia kompetensseja ja kokemuksia, organisaatioiden tarjoama tuki voi tasoittaa eroja ja johdatella onnistuneeseen roolivaihdokseen. Tutkielman tulokset ovat linjassa aiempien tutkimuksien kanssa. Tämän lisäksi tutkielma tarjoaa ymmärrystä asiantuntijasta esihenkilöksi -roolivaihdoksen elementeistä ja näin ollen voi antaa näkemystä roolivaihdosta suorittaville henkilöille mahdollisten roolivaihdoksesta kumpuavien ongelmien ratkaisuun.

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Writing the last words to this thesis in the middle of the Sunday night sums up perfectly all the studying, deadlines, exhaustion and the happiness that these years have brought along.

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Even though it is very wistful to end this phase of my life, I feel glad that the thesis project is finally over, and I can step wholly to working life. If the next phase in my life includes even the half of the joy, laughter and freedom that my studying years have brought me, I surely consider myself happy.

In Helsinki, 13.6.2021
Sara Ripatti

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1. INTRODUCTION

1.1 Research background

Boardrooms all over the world face great challenges concerning the recruitment of CEO's - whether the leader of the organization should have expertise from the field the organization operates, or should the position be given to someone who masters the field of leadership and management. In addition, this issue emerges outside boardrooms; the question is asked again on other levels of organizations considering managerial positions. It is natural to raise an expert to lead a team of experts, but does experts embody leadership or managerial features?

In academia it is recognized that expert leaders have a relation to better organizational performance (e.g. Goodall 2011 and Goodall & Pogrebna 2015, Finkelstein & Hambrick 1990). Goodall has been examining this subject for many years and has established a theory of expert leaders; indicating that organizational performance is effective when leader has a deep understanding of the core business (Goodall 2012). She raises a fair discussion of the trend that has been going on lately in business world – hiring general managers and professional leaders outside organization for top leadership positions (e.g. Frydman 2007; Bertrand 2009).

Goodall proves that general managers in leadership positions are not sufficient if they lack knowledge of the core business. It is natural and self-evident that the top leader benefits of having knowledge over the field they are leading. However, Goodall describes cleverly the choice for a leader as a pendulum swinging from expert to general manager (Goodall 2012, 2). Thinking about human resource that has limited cognitive capacity, limited time and multiple other objects of interest, candidates for leadership positions vary and therefore propose a dilemma. It can be thought as a line of capable experts that have varying proportion of skills; one has amazing understanding of the core business but does not want to lead or lacks leadership skills, one is a fairly good expert and embodies better leadership qualities than others. The dilemma concerns defining the perfect proportion of leadership skills and expertise on the field of core business and then finding a person that embodies this balance. But does an expert have to be perfect leader in the beginning, or are leadership and management learnt along the way?

How does an expert rise to attain leadership position among other experts? Is there any distinctive path that can be recognized? And what happens when professional experts are

dropped to whole new positions far away from their expertise? These questions are interesting and important, as previously mentioned trend of utilizing general managers in leadership positions is taking over the business world. Expert leader theory needs further examination to be justified. Deeper understanding of the expert leader concept proves its significance and placement in the organizational sciences and might just help the experts to understand their complex situation in their new position.

1.2 Research context

Leadership and management has been a hot topic in academia for decades. Especially around leadership literature, paradigms after paradigms have emerged, yet no simple definition for the concept has been found, as Ford (2005, 237) summarizes. Parry and Bryman (2006) have set a timeline for leadership theories and categorized five stages of leadership paradigms, which indicate the change in the focus of the theories rather than abandonment of the previous theories. According to authors, *trait approach* ruled the literature until late 1940's, after which emerged *style approach* that lasted until 1960's. *Contingency approach* continued from late 1960's to 1980's, followed by *new leadership approach* in the late 1980's. Authors name the golden era of *post-charismatic and post-transformational approach* to conquer 1990's.

Figure 1 clarifies the transition of focus in leadership literature. According to Meindl (1995), Parry & Bryman (2006) and Busse (2014), older theories, such as trait approach and behavioral approaches, tend to focus more on the leader. Trait approach is convinced that leaders are born, not raised, and tries to map leadership characteristics that individuals embody. Along the style approach, focus of leadership literature turned to behavioral approaches, seeking for distinctive leadership styles that have certain effects on subordinate response on leader's behavior. Contingency approach stresses the importance of situational factors in leadership.

Heroic / Leader-centric

1940   Trait approach

Behavioral approach

Collectivistic approach
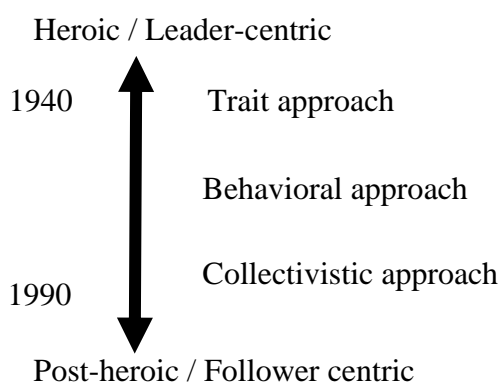
1990

Post-heroic / Follower centric

Figure 1. The change of focus in the literature of leadership (Adapted from Meindl 1995, Parry & Bryman 2006 and Busse 2014).

In the 80's, leader-follower focus took its place in the literature, represented by authentic and transformational leadership approaches. Especially transformational leadership theory introduced by Burns (1978) and later discussed by Bass (1985) gained huge popularity in organizations in 1980's and onwards. Both transformational and authentic leadership theories lean on strong leader that leads single-handedly, but theories give credit also to followers. For example, Burns (1978) mentions that leaders should improve their relations with followers and Luthans and Avolio (2003) present in their theory of authentic leadership that leaders should serve as role models to elevate their followers to lead themselves.

However, both theories emphasized the role of individual leaders. Mainly from the critique of leader-centric theories emerged post-heroic leadership approaches around 90's. Change of focus towards follower-centric view can be seen in theories such as collectivistic theory of shared leadership (Meindl 1995; Pearce & Sims 2000; Fletcher 2004). For example, Meindl (1995, 331) notes that followers give context to all leadership and define it, as leadership is perceived by them. Yammarino et. al (2012), on the other hand, handle leadership as formal and informal relationships in teams, groups, dyads, departments and networks.

The collectivistic theories have of course faced critique. For instance Locke (2003, 283) disagrees in his integrated leadership model with the diminishment of a specific leader, he rather sees leaders as vital part of team-leadership theories. In addition, in the letter exchange of Locke, Pearce and Conger (2007), authors first discuss about the shared leadership model, seeming to disagree about the theory and practice just to end up their letter exchange with agreement that adopts the best of both worlds; leader has its place in modern day team-based organizations, but the approach of single, coercive leader is dated. As Locke (2007) argues in his letter to Pearce and Conger, pure shared and distributed leadership is still rarely executed in real life organizations.

Given the lively background of leadership literature and paradigm changes, it becomes intriguing to examine individuals that stand out among their peers to lead the group. In fact, as Day et. al (2014, 64) state, leadership literature transition from trait approach to behavioral

approaches derived another change of focus in the leadership literature, abandoning the search for "correct" leadership theory and emphasizing the developmental factors of leadership. There has been a transition from specific leadership theories to examining and understanding the developmental processes of, for example, leaders and followers or self-managed teams. Leader and leadership development are two different approaches. Leader development is intrapersonal, focusing on individuals and leadership development is interpersonal, enhancing leadership capacity and developing effective leadership processes. (ibid)

The focus of leadership literature has changed to mirror the reality around us. As Bass (1999) argues, after the Cold War, globalization and automation changed the game dramatically; manufacturing economy was outsourced to the third world countries. Therefore, knowledge became a vital strategic asset (Grant 1996; Bass 1999; Erhardt et. al 2009), which means human resources as a core competence of an organization, leading to highly educated work force and having professionals as employees. Hence, more often organizations have a flat, team-based structure with less hierarchy (e.g. Yammarino et. al 2012). Erhardt et. al (2009, 165) describe the importance of team learning and team-based structure in knowledge work, but also the point that managerial functions are highly important for professionals to leverage and mobilize their knowledge. Managerial functions sustain team members ability to collaborate, integrate and share the knowledge.

In the context of earliest leadership theories, it is interesting to examine the profiles of expert leaders, their characteristics, traits and motivation for certain behavior. To honor novel leadership literature of leader and leadership development, it is also interesting to explore the path that has brought them to the point where they are now. In the light of current working life emphasizing team-based structures, the aim of this thesis is to explore experts as they stand out among their peers to become managers and leaders for their group.

1.3 Research gaps

Goodall (2012) has examined the reasoning behind expert leaders, their influence on the profitability of the company. The term expert leader lures to think of CEO's and listed companies, leaving the lower levels of organizations rather untouched. This thesis will broaden the concept of expert leaders as it takes closer look on middle-ground leaders of organizations. Latter part of this thesis follows a discussion of the term 'leader' and whether

it should consider only leaders or is it sufficient to comprehend other related concepts such as management.

It is commonly recognized that experts are promoted to leadership or management positions based on the excellent work they have done in their previous position, rising from the literature (Ristikangas et. al. 2008; Ibarra 1999) and from everyday business life (Walker 2002). Walker states that it is important to have guidance of superiors, mentors, subordinates and other influential people in the organization. Understanding the concept of expert leaders, their path and influential attributors, may offer help the individuals go through the role transitioning successfully. This has also been studied, for example by Ibarra (1999), who found that in the role transitioning, it is important to observe others in similar roles and get feedback to develop. By greater understanding on the matter, support and feedback could come more easily from the environment of expert leaders, and Walker surely writes about the lack of support for beginner managers in working life.

Many Finnish theses has been made on the subject, but the focus is on specific fields of industries. There are also couple of dissertations on the subject, for example one purely examining the path from expert to leader in broader view (Raine 2018) and two Finnish dissertations examining the subject from the viewpoint of physicians and medical leadership (Tuomiranta 2002; Virtanen 2010). In fact, majority of the search on the subject resulted research on the medical field, which is understandable as hospitals are highly hierarchic organizations filled with highly educated experts. Leadership and management are not commonly recognized to be educated in the medical schools, yet physicians and nurses are expected to lead their teams if they raise up in the hierarchy to such positions in the hospital. The need for expert leader studies is strong in health care domain, and it is in place also in other fields. Dissertations and theses are stating that the subject needs to be studied more in order to understand the concept of expert leaders and leadership development, and in a way the number of theses indicate that the subject is current. Ibarra (1999, 789) notes in her study that research on broader variation of firms is needed in order to gain deeper understanding of the subject.

This thesis aims to examine the concept in various fields, focusing more on the concept rather than industry it occurs in. The book *Asiantuntijasta esimieheksi* by Ristikangas, Aaltonen and Pitkänen, which is used as a guidance with great gratitude, has influenced to the composition of this thesis. Ristikangas et. al (2008) have interviewed 12 individuals and

utilized additional insights off the record, based on which they constructed a matrix that can be utilized to map different career paths and role transitions. Whereas Ristikangas et. al (2008) interviewed and examined individuals with the goal of finding answers to the questions such as why the interviewees wanted to change their roles and how did they feel about the change, this thesis will also precisely try to find and understand factors that influence to the success of role transitioning. This is done through the narratives of the interviewees. The analysis differs also from the research of Ristikangas et. al; their focus was to construct the matrix and categorize different career identity paths, whereas this thesis utilize the matrix not to put career identity narratives into categories but to embrace the differences between the paths and focus on the underlying elements that may help to answer to the research questions. Unique paths may reveal the elements influencing to the expert leader concept.

Role transitioning has been studied at least from the 80's to this day (e.g. Louis 1980; Ibarra 1999, Ashforth 2000) and both discussion and developed theories are useful for understanding expert leaders. However, role change is a broader concept than expert-to-leader role change, which is less researched area than role changes in general. As Yost, Strube and Bailey state in 1992 in their article of construction of selves, it is interesting and necessary to examine *how* the self becomes because we already know *what* self becomes.

1.4 Research problem and objectives of the study

The goal of this thesis is to understand the phenomenon of expert leaders, an individual's path from expert position to a leadership position. The aim is to recognize different paths and understand the underlying elements that influence to the success of career transitioning. The possible elements that have influence are grounding from the literature and guiding the formation of research questions. Hence, the concept of expert leader is examined first with literature review addressing the related subjects, after which it is examined through identification of the career paths and understanding the elements of the identity work during the transitioning by utilizing two frameworks. Empirical data is provided by interviewees from various industries, linking factor being the similar career transitioning story, including role change from an expert to a leader. Similar studies are made both with certain scope of industry in mind (e.g. Ibarra 1999; Eiser 2008) and with varying industries (Ristikangas et. al. 2008). However, the concept involves very subjective, personal and abstract issues, which leaves room to examine it further.

The goal of this thesis is to find interactions between two frameworks and integrate them, if possible, to obtain in-depth view of expert leader concept. The aim is to seek deeper comprehension of the fundamental processes influential to the success of role transitioning. Thus, the research question is placed as follows:

1. What are the elements that influence on the success of expert-to-leader transition?

The sub-questions presented below are supporting the primary research question by connecting the frameworks with the concept and widening the perspective for greater comprehension of the primary question:

3. How the structure of the career path influence on the success of the expert-to-leader role change?

4. What is a successful role change?

5. What kind of influence does colleagues and subordinates have to the role change?

1.5 Delimitations

The focus of the research is on Finnish expert leaders and managers. Each of the interviewees are experts in their field and have a managerial position among their peers. The data is limited to sample size of 6 due to difficulty of finding appropriate interviewees considering the time frame of the thesis. Sample size may affect greatly to both reliability and validity, which has been taken into consideration in this thesis.

In addition, the sample is limited by geographical and industrial factors. All the interviewees were gathered from different fields of industries, which are military, paper and paper board, pharmacy, IT, early childhood education and university. Sample represents solely Finnish expert leaders, which makes the research geographically very limited. However, the research focusing on understanding a phenomenon is convenient to execute with qualitative methods, which do not aim for generalizable results.

Terminologically, the concept of expert leader is ambiguous. It may refer to talented, professional leaders, which are not the subjects studied in this thesis. However more commonly expert leader is used in the literature as it is dealt also in this thesis – to depict an expert from a certain field who has become a leader of his or her colleagues.

1.6 Research structure and theoretical framework

This thesis aims for in-depth understanding of the phenomenon of expert leaders through interpretation of the path that experts have walked to gain the position of a leader, and hence the empirical part of the research is executed with a qualitative methodology. As the purpose of the research is to gain deep comprehension of the phenomenon, it is executed with analyzing semi-structured interviews of 6 expert leaders without placing emphasis on the domains or the geographical background of the interviewees. The development and elements of these paths from expert to leader are mapped and interviews are compared to each other to find similarities, differences and, eventually, the key insights of the phenomenon.

The research constructs from three parts - literature review, empirical part and discussion, which combines the first two parts. First, the literature review presents the current literature, opens the concepts and theoretical frameworks related to the phenomenon, painting a holistic picture of the theme. The empirical part comes second to examine methodology and presenting the research design, data collection and interview findings. Third follows the analysis and conclusions combining the literature review, previous knowledge and the empirical material of this study to propose theoretical and practical contributions. Lastly, further discussion of the theme, limitations and research suggestions are presented.

As a qualitative thesis, there are limited possibilities to generalize the results. However, the aim of the research is to comprehend the phenomenon and create deeper understanding by using interviewees from various industries and with a background of different tenures. Semi-structured interview method lured the interviewees to talk about their career and identity development without exact questions limiting unnecessarily the answers. The aim of the interviews was to focus on the path and the essential factors that had influence along the way.

The theoretical framework of the research is presented in the figure 2 below. The purpose of this thesis is to understand the concept of expert leader and more precisely the elements that are related to the success of the role change. Two frameworks used in the research are depicted in the theoretical framework as arrows that allow the research to go deeper, closer to the inner circle.
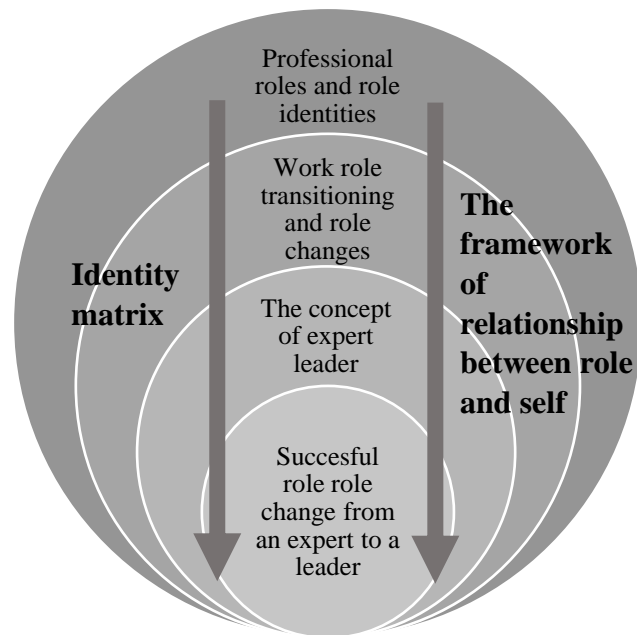
Figure 2: Theoretical framework

As presented in figure 2, in the outer circle of the figure are roles and role identities, for the concept of expert leader is related to them; expert leader is a role identity of an individual. However, the core of this research is to understand the change of roles and transitioning process related to it. As the path from an expert to a leader is researched in this thesis, the theory of role transitioning is examined to understand the change of roles. The theory of roles, identities and role transitioning is dealt focusing on the occupational point of view. In the figure the inner circles mark the focus of the research, which pursued through two frameworks used as a base for the research.

2 CONCEPTUAL BACKGROUND

The purpose of the literature review is to comprehend the themes, concepts and the purpose of the research. Conceptually this thesis will build on two frameworks around the expert leader subject. In addition, understanding the expert and leaders roles individually may help to understand the reasoning behind the role changes. The chapter surrounds the core concept by introducing the background of roles and role identities, then familiarizing role transitioning and presenting two interesting frameworks, after which the actual roles of leader and expert are discussed.

2.1 Roles

The concept of expert leader is a combination of two roles; an expert role and a leader role, which both can be very distinctive and strong identities of an individual. Roles and role identities are complex self-interpretations that affect greatly in our everyday life by defining some parts of our behavior towards other people and how we perceive ourselves, other individuals and our surroundings. Human behavior varies and is affected by the social identities and situational factors (Biddle 1986). Ashforth synthesizes (2000, 4) that sociology has two main perspectives on roles: the theories of symbolic interactionist and structural-functionalist. Both theories unite in some areas of research, such as in occupational life, but the main difference between these theories is that structural-functionalists define roles as relational to expectations of given positions in social structures and symbolic interactionists see roles as negotiable emergent agreements among individuals. Ashforth argues, combining the two theories, that organizational positions become institutionalized, but the interpretation of the position and enactment in it can be negotiated within organizational constraints.

Berger and Luckmann (1966) introduced the idea of social construction in their seminal book *The Social Construction of Reality: A Treatise in the Sociology of Knowledge*. The theory sees reality as socially constructed; over time, individuals interacting with each other create mental representations of actions which eventually become habituated into mutual roles that individuals play with each other. As these roles become available for other individuals to play, the mutual interactions become institutionalized. Individuals' perceptions, knowledge and interpretations of the roles become embedded to the society and hence, the reality can be said to be socially constructed. In a way, the theory combines the symbolic interactionist and structural-functionalist views earlier presented. Authors lay emphasis on the social

aspect of roles stating that structures of the society change for there is social interactions of individuals defining the roles and reality. In the theory it is called intersubjectivity referring to the comprehensions of multiple realities of individuals that they will bring to the interaction. The theory of Berger and Luckmann's has been agreed as a key concept of sociology and recognized to be one of the most important sociological theories of modern world (International Sociological Association 2020)

From Biddle's article (1986, 69) comes quite clear that literature does not agree on various aspects of role theories. For example, expectations that create the roles are seen to be either social norms, beliefs of individuals or even bare preferences. Biddle reviews four key concepts in his article, which have been commonly accepted to role theories, however, with differentiative opinions on the definition. Firstly, in role theories consensus refers to the common agreement of the expectations on certain roles, although the origin of the expectations varies between theories as stated earlier. Consensus improves social integration and it has also been named attitude similarity in the literature, which describes the concept well. The second concept is conformity, which means compliance to expectations. Individuals tend to behave similarly in certain roles, which has been called social imitation and it advances the integrity of roles. Third concept is role conflict, describing the tension and conflicts that conflicting expectations and incompatible behavior may cause. Experiencing role conflict can be stressful and often leads to not integrating well to the workplace. Fourth key concept is role taking, which means that social interaction requires individuals to take roles of other people. Biddle describes it as adjusting self to other people's situations and understanding them. The term is slightly close to empathy or conformity, but still unique and separate from them. It has not been found to be universal and required in every social situation, but it has had an impact on literature. Biddle reminds that role theory research is rather slowly developed and needs to be refined and examined more.

2.2. Role identities

As Ibarra (1999, 765) states, it is commonly recognized that identity changes are following career transitions, which makes it important to examine role identities when studying expert leaders. Identity is a construction of self as a combination of social constraints and individual cognition (Ashforth 2000, 23). Stryker and Burke (2000) state that identity research was born from the framework of George Mead in 1934, has developed from that and comprises now two main directions, both examining how social structures affect the identity and how

identity affects social behavior. First direction has emphasis on the society's relation to self's behavior and the second direction focuses on the internal aspects of self's behavior.

Ashforth (2000) names these two directions as social identity theory and identity theory in his book of organizational roles. Social identity theory sees identity as relational and comparative; Ashforth gives an example of the identity of a doctor that has a meaning in relation to the role of a patient. These different roles or identities are constantly compared by us and other people, favoring our own identity. Identities in social context involve the perception of belongingness to social roles or categories. Identity theory adds that identities are determined in relation to the role that individual plays in the society. Ashforth argues (2000, 26) that in interaction individuals take roles according to the context of the situation and these roles affect greatly how individuals' behavior is perceived. Because the values, meanings and standards associated to roles vary and an individual plays multiple roles in a society, an individual is seen to embody a selection of multiple selves. Identities are tied to social categories and roles, which again are related to each other; role changing affects simultaneously to the social position of an individual.

In addition, Ashforth (2000, 38-42) mentions core conception of self, a global identity which represents the sense of clear self-definition of an individual. It is stable perception of self and influences on the behavior in roles that individual plays. Global identity, or more commonly in the literature called personal identity (e.g. Ibarra 1999, 766), constructs from character traits that are displayed to others, which on the contrast, others also attribute to certain roles and identities. Characteristic traits in the basis of personal identity are playing a part in this thesis, as the aim of the research is to identify and analyze distinctive traits, behaviors or thinking patterns that may affect to the path from expert role to leader role. Ashforth (2000) mentions that roles and role identities that are in cohesion with individual's global identity are more relevant and highly valued, which enables greater assimilation to the role.

As role identities are such complex socially constrained cognitive formations of individuals, role assumption and transition between roles may cause internal conflicts. These conflicts may be caused by the changed expectations connected to behaving in new position or change in social position. There exists problems with role transitions, such as role ambiguity, where expectations misguide the enactment in role; role malintegration, where multiple roles of individual do not fit together; role discontinuity, which follows from too many malintegrated

roles and role overload, which happens when there is too great external expectations for the individual in the role. These can be seen especially in organizational life, transitioning between occupational roles. Conflicts in occupational careers have influence to poor work performance, low commitment to the organization, increasing accidents and resignations. (Biddle 1986, 82).

Ibarra and Barbulescu (2010) have studied the role of self-narratives constructing identities in work role transitioning. Self-narratives help individuals to form, maintain, review and reconstruct their work identities, and they have been earlier recognized to be important part of every-day identity constructing (Bruner 1987). Self-narratives can reduce tension between the roles as they seek ways to explain the transitioning. Ibarra and Barbulescu remind that individuals tailor the narrative according to the audience. According to the article, individuals use various repertoires in their narratives, which change as the roles and identities are changing along the career path. Entering to an unknown role may raise uncertainty in an individual, which can lead testing multiple possible selves and at the same time there can exist multiple clashing narratives. Testing the stories to different audiences give information of which emotions, justifications and elements are socially authentic and validated, and these will guide in constructing identity and self-narrative. As individuals use self-narratives somewhat naturally, it is interesting to examine career paths from experts to leaders and hear the possible self-narratives that interviewees have.

2.3 Professional identity

Embedded to the concept of role identity there is a sub-concept of professional identity, which plays an important part in this thesis. Schein (1978) has defined the professional identity as relatively consistent comprehension of self in the context of professional role. It involves beliefs, motives, attributes and experiences of the individual, and it develops over time among the gained experience, feedback, assumptions and preferences. Changes in professional identities have been noticed to happen simultaneously with career role transitions. Similarly to earlier mentioned negotiability of roles (Ashforth 2000), Schein (1978) argues that experience helps individuals to adapt to the new professional role, but it also helps individuals to refine the essence of the roles they play; with enacting in the role individuals over time interactively mold their roles to suit them and their values, personalities and behavior. Professional identities play a vital part in organizational studies and individuals may even see them more important to their identities than other common

attributors, such as age, sex, race or ethnical background (Hogg & Terry 2000, 121). According to Dobrow and Higgins (2005), professional identity has a significant effect on individual's career development and they especially put emphasis on the social level of identity construction, the networks and social relationships.

Literature addresses the term identity construction (e.g. Mead 1934; Goffman 1959) when examining the negotiation of the identity in social structures; by showing signals of self and observing how others react to the behavior give opportunities to adjust not only self-conception but also the boundaries of the identity. Ibarra (1999) writes about identity construction in the context of professional identities and notes that position or status changes in organizational life provide opportunities to renegotiate both professional and personal identities, which are related to each other. This elaborates the connection of multiple identities as Ashforth (2000) describes in his book; global identity is the root identity where other identities grow. Multiple identities has been addressed in the literature of possible selves (e.g. Markus & Nurius 1986), theories resembling nowadays very popular, rather amusing motivational phrases used in interior design, such as "live your best life". According to Markus and Nurius (1986), possible selves provide the relation between motivation and cognition, who one is, who one might become and who one desires to be. The theory of possible selves is well noted in academia, and it helps to clarify the path through different roles to the position and identity individual desires to obtain. Recognizing the undesirable and desirable paths, individual has emotional and cognitional filters to adjust own behavior and other peoples' influence, which guides the individual on the journey to seek for the future self. Ibarra (1999, 783) describes how socially influenced identity construction is in the occupational life and states that certain senior members have a huge influence on junior members' identities as role models and giving feedback.

Identity changes and adaptations can cause stress and struggle in occupational life for individuals. Some role changes are not voluntary and even if the change is hoped, it involves heavy load of emotions through changes social position and expectations. Hence, it is interesting to examine the theory of career transitions, as they always involve role and identity changes.

2.4 Career transitions

Khapova, Arthur, Wilderom and Svensson (2007, 585) define career change after Ibarra's writings as "*a move into a position of greater managerial responsibility and organizational*

status, a transfer to a similar job in a new company or industry, a lateral move into a different work function within a familiar field". According to Ibarra and Barbulescu (2012), literature handles role transitions as both actual, physical changes in career or antedating and following psychical changes, stating that the term covers wider perspective than the actual change.

This thesis will rely on two frameworks of transitioning between roles; Ashforth's framework focuses on the relationship between roles and identities and the identity matrix by Ristikangas, Aaltonen and Pitkänen sheds light on the possible paths from expert to leader. Ristikangas et. al. matrix is used as a platform for analyzing the career changes and role switches and Ashforth's model dives deeper into self and seeks to explain the changes in career. Both frameworks are introduced in the latter chapters in this thesis.

2.4.1 Occupational role transitions

Ajzen (1991) presents three factors that predict career change intentions in his theory of planned behavior. Those three factors are attitudes towards the change, perceived social pressure of making the change and perceived behavioral control. Ajzen states that attitudes are formed from beliefs and experiences and they have a great affect to the behavior of an individual for doing the change. The theory has similarities with the theory of possible selves by Markus and Nurius (1986), as the motivation for the change in career path according to Ajzen constructs partly from the beliefs and desires of an individual, whereas in the theory of possible selves, behavior of individual is affected by the assumptions of desired and undesired paths. The second factor of Ajzen's theory of planned behavior is perceived social pressure, which works as a strong motivational factor for career change. Expectations of especially important persons for individual and compliance together contribute to the process of career change. The third factor, perceived behavioral control, refers to individual's awareness of own capability of pursuing desired behavior. Ajzen argues that perceived behavioral control alone affects greatly to the process of career change; strong beliefs of own capability can push towards the actions needed in career change.

Khapova, Arthur, Wilderom and Svensson (2007), on the other hand, have examined the same predictors of career change as Ajzen (1991) in information technology sector. Professional identity was tested to have the strongest significance on career change intentions and the authors have raised discussion whether all attributes should be integrated

to professional identity, as it could serve as a constellation of all attributes associated with career change intentions.

Likewise, Eby, Butts and Lockwood (2003) have studied predictors of success in boundaryless careers, identifying three classes of variables called career competencies. According to the authors, the term boundaryless career has emerged to the literature of organizational studies as the reality has gone towards unstable and volatile organizational environment with increasing trend of losing jobs, career interruptions and unconventional, non-vertical career paths. The career success has been determined by three variables which are career satisfaction, internal and external marketability. The three categories for predicting success in the article are why, whom and how, including competencies such as understanding career motivation, personal meaning, identification, career realities and boundaries and being proactive (ibid 690-692).

In addition, Hall (2004) mentions individual competencies in his studies. He states that ability to adapt is one of the most important traits considering career development and writes about protean orientation as a characteristic of individuals, which has an influence on career transitions. Adaptability and self-awareness are two "metacompetencies" that affect to the ability of individual for being protean. Both are important, as having only one ruins the balance and, for example, individual that has great adaptability but lacks self-awareness becomes a chameleon that does not follow own path but someone else's (ibid, 7).

Ibarra (1999, 787) has examined role transitioning process and formed a figure of the adaptation process. The study is a case study of specific field of industry, hence ungeneralizable, but it offers valuable insights on the process of observation, experimentation and evaluation that individuals iteratively do in the case of career transitioning. Ibarra interviewed total of 34 MBA graduates employed to baking and consultancy services and built a theory of three-task model of adaptation, which consists of observation of role models, experimenting the new position with provisional selves and evaluating own behavior by internal criteria and external feedback. The model is consistent with role transitioning literature, which has emphasis on self-awareness on an individual. Similar to Ibarra's work, Hill has examined in 1992 individuals who are taking on their first managerial roles with same results as Ibarra; individuals imitate and reflect on their own behavior based on the external responses.

These all thoughts are conforming the seminal work of Louis (1980) on career transitions. In her crucial paper she categorizes career transitions, seeks for the commonalities for the concept and presents coping mechanisms of individuals transitioning to new roles. She has created a conceptualization of sense-making process in role transitioning that works as a coping-mechanism; she states that individuals create predictions and anticipations based on the knowledge they have from their previous position and the information they have from their surroundings. Predictions are created for coping with the unknown facts, filling the voids of primary knowledge and they are often based on beliefs and guesses. Experience in new role reveal inaccurate predictions, which causes tension and discomfort. Individual aims to reduce discomfort by configurating the assumptions and knowledge, renewing the interpretation and cognitive maps of the role. (ibid) To simplify, an individual forms a picture of the new role in beforehand with the current knowledge and alters it when learning how the role is constructed in reality. This is something that previously mentioned authors are also referring; individual being motivated to change role is most likely to examine the new role in beforehand to learn and has competencies such as adaptability and self-awareness to alter the interpretation of the role to diminish the tension and to successfully play the new part. Louis (1980) also argues that the presumptions of individuals are more accurate and hence create less tension if the case is internal transitioning inside the company, which is natural as individuals have experienced the role as outsiders, perhaps working with the person having the role they are now transitioning into. Further, Louis argues that insiders have the benefit of working previously in the same company, which allows them to interpret changes, surprises and new situations through the history they have. Knowing the style that organization operates, and current situation of the business can help in the sense-making process. Coming from outside of organization to a new role, individual is more likely to use malfunctional interpretation from previous roles to comprehend the situation. Similarly, Ibarra (2003) and Khapova et. al (2007) have found that prospects for career change and the conditions for its success are connected to the familiarity of the field of work. This is important note as this thesis addresses solely career paths that have different positions in the same field of work, role transitions from experts to leaders.

Career change intentions and decision-making has been studied by many other authors (e.g. Keller et. al. 1982; Sampson et. al. 1996). The studies present a view of cognitive synthesis of the attributes that affect to the career change and organizational behavior; for example, balanced professional identity may affect positively to behavioral control of individual and

simultaneously negatively to the perceived social pressure, due to the self-awareness and confidence.

2.4.2 Success of career role transitioning

As the main research question encloses the aspect of success in the expert-to-leader transitioning, it is important to understand what does success mean in the role change. From the literature presented above, it becomes evident that the success of the role change comes from the elements such as individual's inherent cohesion and external indicators such as individual's capability to perform behavior that is expected from the role.

Whereas role change inevitably is influenced by person's identity and internal factors dependent on the internal features of an individual, it also has an external environment which influences to the change and its success. Roles are comprehended as socially constrained phenomena played against counter roles, and considering work roles, organizational culture and expectations intertwine undisputedly to the conception of successful role change.

Based on the literature presented above, the question of successful role change seem to have quite simple answer. Success comes from individual learning to play the new role by assimilating and adapting to the expectations with the help of his or her inner capabilities and resulting plausible behavior which lead to external results that organization is expecting or respecting. Although it proved difficult to identify literature solely focusing of success of role changes, the role identity and role transitioning literature circles around the topic by providing insights on analysis of the change and its elements.

2.4.3 The identity matrix

Ristikangas, Aaltonen and Pitkänen (2008, 31) have developed a matrix framing the possible paths of an individual, starting from an expert position and proceeding in the career path. Authors name the figure identity matrix, and it is simple and useful for comprehending and analyzing the data of this thesis. Therefore, it is utilized with great gratitude to the authors; the foundation of the matrix is derived from a similar interview-based study as this thesis. In this research it is expected that interviewees recognize and describe their identities and roles in various stages of their paths from an expert to a leader and express the feelings attached to the roles, after which the matrix by Ristikangas, Aaltonen and Pitkänen is utilized to map the path.

From the figure 3 can be seen that the X-axis of the matrix is describing the roles and identities of leaders and the Y-axis presents the same with expert roles. In this matrix the manager-word it used to refer the leader part of the expert leader concept. Arrows point to the growing degree of experience in expert position (Y-axis) and managerial position (X-axis). Boxes 4, 5, 8 and 9 from the center to the right corner in the matrix depict the mix of both roles. One reason for using Ristikangas, Aaltonen and Pitkänen's matrix is the flexibleness of it; it can be easily utilized to describe multiple career paths of expert leaders. Matrix's simplicity makes it understandable for all and therefore rather stable measurement for describing and recognizing identities, which have characteristics such as vagueness and subjectivity that make them hard to stabilize for research.

The authors emphasize that the paths of expert leaders do not follow linear line and all the boxes are equally fine to be at, excluding the box 5. Boxes are numbered for the clarification and later called stages. This thesis will address the stages of career path using the same meanings of each box as Ristikangas, Aaltonen and Pitkänen in their matrix, thus the stages are described briefly below according to the authors (ibid, 32-35) to later clarify data analysis and discussion.

Experienced expert – being an expert is the core role 3	Expert with a part-time role as manager 4	Expert leader – complementing roles of manager and expert 9
Expanded expertise 2	Expert and manager – clashing roles 5	Manager, who has part-time role as expert 8
Novice – not an expert, not a manager 1	Expanded managerialism 6	Experienced manager – being a manager is the core role 7

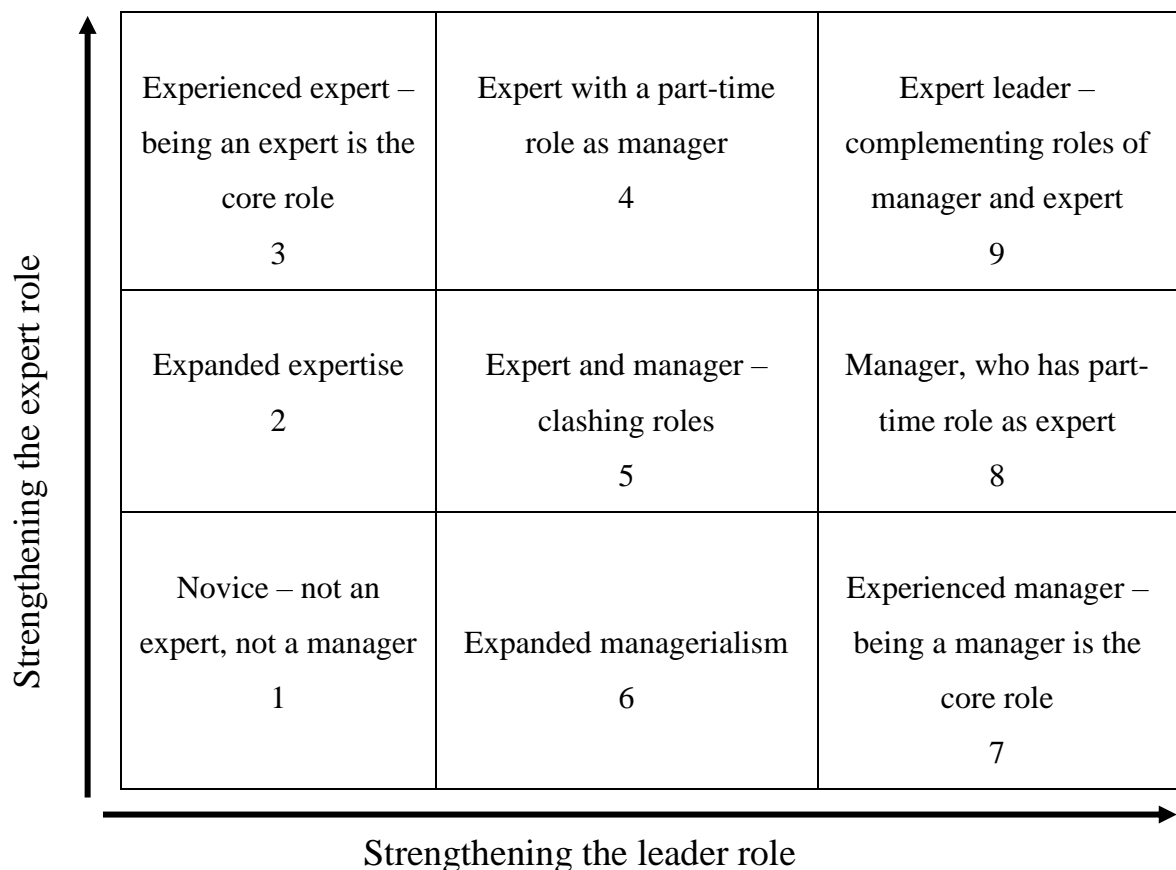Y-axis: Strengthening the expert role

X-axis: Strengthening the leader role

Figure 3: The identity matrix (Adapted from Ristikangas, Pitkänen and Aaltonen's book Asiantuntijasta esimieheksi 2008, 31)

It is important to read the identity matrix correctly. The solemn purpose of it is to build a picture of different roles during a career path. Therefore, for instance, moving from box 3 to box 6 does not mean the decrease in expertise. The Y and X axis cannot be seen as competencies or knowledge in this case and drawing the line to previous stages does not indicate the loss in skills or knowledge.

1 Novice

In the novice stage an individual has finished studies and taken the first step towards occupational career. Individual may have gained working experience from traineeships, but the main source of knowledge and competence is gathered from the studies. Individual lacks both expert and managerial experience in this stage and it is a first stage of career path.

2 Expanded expertise

The second stage describes a professional identity of an individual that has gained knowledge in occupational life which has expanded his or hers expertise. Based on the feedback along the working years, individual recognizes personal strengths and areas for improving. Already in this stage, some may gain experience on leadership and management with projects they have given to lead.

3 Experienced expert

In this stage the expert identity is strong, and individual defines him/herself as an expert in the field. Individual is acknowledged from the work and is recognized in his/hers field. Individual enjoys the position and finds the work interesting. From this stage it may be difficult to proceed in career path, for upper-level positions may be only managerial work, outside the expert path.

4 Expert with part-time role as manager

In the best scenario, this position is gained naturally and without excessive expectations of managerial work. In an example of Ristikangas et al. (2008), in this stage hard core expert

has given an independently working team to lead and guide, without having to drop expert position or compromise it to do managerial work.

5 Clashing roles of expert and manager

This stage is reached when individual faces requirements of two clashing roles and cannot fulfill them. Expert accepting managerial role and facing management protocols, expectations and processes that he or she has not ever heard before can lead to this stage, especially when having no mentor or introductory phase to the new role. Also timing and organizing may derive problems with two roles; expert may not be willing to reduce the expert work and managerial role is demanding too much for two roles to be balanced. This stage is the one that individuals should aim to mitigate and transition away from.

6 Expanded managerialism

This stage is met if expert recognizes the desire for managerial work or leadership position from the early on and starts to develop his or hers knowledge on supervisory work. Leadership and management starts to become more important to individual's professional identity and he or she is interested to expand the position. Authors remind that this stage can be met also from the top down when an expert is decreasing the amount of expert work and redirecting the position towards human resources, supervisory work and management, making effort to expand the role and identity to meet managerial expectations.

7 Experienced manager

In the matrix, opposite to the stage 3 is the stage 7 with role identity completely around leadership and management. Individual defines him/herself at this stage as a supervisor, manager or leader, perhaps a general manager (see Goodall 2012, 2) with experience on leadership and management from multiple fields. Authors argue that this stage is met by developing skills and identity along the X-axis of the matrix, but also from the long and prosperous expert career with slowly gained knowledge and expertise of managerial work.

8 Manager with part-time expert role

At this stage, individual defines him/herself as a manager but has a side-role as an expert. Unlike the stage 5, individual does not have two clashing roles, but two roles alongside, managerial role prioritized. According to the authors, individuals tend to develop their career from stage 8 either to stage 7 or 9.

9 Expert leader

The identity of expert leader in stage 9 is balanced combination of two roles, expert and leader. Timing and organization of work tasks is natural and efficient without causing clashes between the two roles. Authors note that these two roles are not collided or melt to each other, rather they should be kept separated. In this identity, individual has gained enough knowledge and experience of both roles that knows how to act in different situations and which role should be played. The stage 9 is not ultimate goal for career path and on the other hand, it can easily to slide to the stage 5 if roles start to clash for some reason. The stages are not stable and sometimes require cognitive effort to balance.

2.4.4 Framework of relationship between role and self

Alongside the identity matrix, this thesis will utilize another framework for more throughout understanding of the phenomenon. Whereas Ristikangas, Pitkänen and Aaltonen's (2008) identity matrix will concretely map the role transitioning process, framework by Ashforth (2000) is used to understand the reasoning for the changes and destinations of career paths. The framework aims to explain the action in disengaging from one role and engaging another, transitioning between roles.

In his seminal book *Role transitions in organizational life: an identity-based perspective*, Ashforth (2000) describes role transitions as macrochanges, which are typically changes such as transitioning into organization, changes within or between organizations or changes in professional career, e.g. leaving the organization. The changes can be both physical and psychological and they are critical in defining professional identity and requirement changes in the cognitive perception of a job. Ashforth, among other authors (e.g. Louis 1980), put emphasis on the role adjustment with defining and molding the professional identity.

Ashforth argues about the significance of *socialization,* which Ibarra (1999) mentions in her studies as well. Socialization is adaptation to the new role with practicing and studying how other people behave in that position. It is about understanding the boundaries of a new position within an interaction with others. Ibarra found that preliminary exploration on the new role and experimenting in advance how the role works is a vital factor in successful role transitioning. Ashforth (2000, 187) adds that the situation differs whether a professional is transitioning to the new role or a novice is. Advanced organizational player can utilize the previous experiences and they tend to adjust the new role with their own insights rather than

just to assimilate to the role. They know how to review the role and fill it with their beliefs and behavior methods.

Figure 4 below depicts Ashforth's (2000, 54) model of the role transitioning process, explaining the relationship between roles and identities in each part of the transitioning. Personal and psychological motives are in the center of the model; Ashforth presents four motives that affect to the identification to new roles. He emphasizes that the more important the new role identity is, the stronger motivation is for the transition. It is important to notice also that the greater identification to the motives means more eager fulfillment of the role.
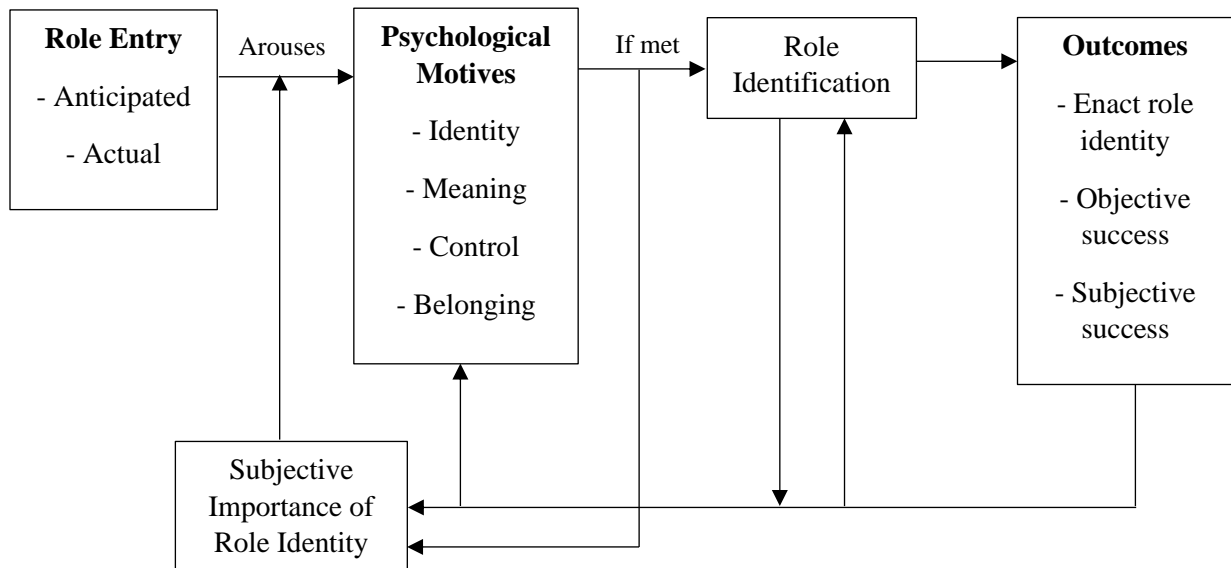
Figure 4: Role transitions and self (adapted from Ashforth 2000)

These motives are identity, meaning, control and belonging. Greater internalization of the motives leads to greater identification to the new role. Identity motive considers self-definition motivations such as self-knowledge, which help individual to recognize self in role and organizational contexts, self-expression which fits real self (cf. Global identity in Ashforth 2000 and personal identity in Ibarra 1999) with the new role, self-coherence which is the desire for maintaining consistency in self and self-continuity which refers to self-coherence in time. Identity involves also self-distinctiveness, desire to be unique and self-enhancement, which refers to the desire to stand out in a positive manner.

The motive for meaning answers to existential questions of why things are the way they are. Meaning can be divided into two forms; meaningfulness and sense-making, and it covers the

comprehension of the fundamentals of the role, the meaning of it and the reasoning why the role is constructed as it is, which are required part of well-developed identities. The motive for control involves features such as primary and secondary control and it rises from the need for consciously participate to the role transitioning process and need for expressing personal identity, maintaining power and controlling the change. According to Ashforth (2000, 68) role identities are commonly recognized to be related to the influential possibilities of an individual, and hence the perceived opportunity to exercise power is also constrained by role identities. The important notion in Ashforth's book is that authority and expertise are also bound to the role identities. Some seek opportunities to have the control and others are not interested pursuing it, however, in any case, the sense of control may help individuals to internalize the role and authentically act in it.

Fourth motive is belonging, which is divided into personalized and depersonalized belonging. The motive raises from the need of participation, being part of the group or community and the desire for attachment with others. Personalized part of belonging refers to the desire begin accepted and liked as an individual. Belonging is highly social motive, and it is attached to social networks especially in the context of hierarchical ranks and occupations. In fact, Ashforth (2000, 71) argues that in role transitions, it may be vital to exit one social network before entering a new one that comes with the new role to minimize the overlap. Whereas personalized belonging is about interpersonal, one to one bonding with people, depersonalized involves broader picture of belonging. It is intrapersonal in a way that individual can become part of the community or a group with having a certain social role. Others in the group may share the same interests, social statuses and beliefs and that brings the feeling of fellowship even if individuals do not know each other well.

All four motives are linked to each other and they are always defined in role transition process grounding on previous roles. The motives are influencing on individual's behavior simultaneously and they are interactive with each other. For example, if an individual lacks the feeling of belonging, he or she may become more self-conscious. Ashforth also states that individuals seek to fulfil these motives even if the role has low motivating potential.

2.5 Who is an expert

According to the Oxford English Dictionary (2020) the noun 'expert' means *"A person who is expert or has gained skill from experience"*. Second, clarifying meaning describes expert

as consulted individual who is regarded as an authority of certain skill, training or knowledge (ibid).

In other words, important factors of an expert are experience from certain field and gained knowledge through it, which lead to the situation that expert is recognized among other individuals.

The definition seems simple, but in real life it is more complex to define who is an expert, especially nowadays as the boundaries of work are diminishing and the working life is demanding knowledge from multiple domains simultaneously in one position. Also, the fact that expertise is bounded to social context, as Ericsson (2014) indicates, is making the concept more complex. Ericsson presents different variations for the definition of expert; time requirement in chess where 10-year mark makes everyone an expert in the game, or a certain academic level attained makes an expert automatically in some people's minds. However, it is harder to define who embodies the expert role in some fields that involve only professionals who work together. In those cases, the social role marks expertise and the experts are nominated by their peers (ibid).

To focus on the knowledge of an expert, according to the dictionary, expertise is gained through both education or training and experience in that field. Interestingly, Ristikangas, Aaltonen and Pitkänen (2008) have noted this in their matrix, which starts from the novice stage and argues that the stage is for educated individuals who are in the starting line of their career path. Degree on the certain field of studies does not give authority of expertise in that field, expertise is obtained through the combination of experience and education. Experience could be said to be more important measure of expert than education or training, because the knowledge does not necessarily have to be gained from the specific learning institutions – in some fields of expertise there is no educational possibility, to think for an example of electronic gaming industry at its earliest stages. The most successful players gained experience while playing independently without any external guidance. Nowadays they might be retired players, experts on the field, that mentor new players in the fast-developing gaming industry. The knowledge for the field can be obtained through experience, regardless of the education, but the experience cannot be disregarded while defining the concept of expert.

The other interesting aspect of the concept of expert is that it seems to be defined also based on the usefulness of the individual. As Ristikangas et. al. (2008) argue, an expert offers insights for the company and with wide knowledge base from the field and ability to create new approaches to the problems faced. Utilizing theoretical and practical knowledge, expert can offer specialized views that other individuals respect. Usefulness is mentioned also in the dictionary definition; expert is a consulted individual.

Ericsson (2014) exhibits evidence on the traits of individuals that my affect to external perception of the experts; research has been made in multiple domains which all indicate that practice makes perfect. Experts are seen to gain their position through practicing and the practice does not end to that, because one thing in common to experts is engagement to the field they are experts in. Ristikangas et. al. (2008) agree; experts are described to enthusiastically develop themselves and their knowledge, they are proud of their abilities and the gained respect.

It is evident that the occupational life and the conception of careers have changed over time in western world because of the transition from manufacturing industry towards service and knowledge work. At the same time there is a stigma of uncertainty in modern day career life due to economic depressions and volatile global markets. As Eby, Butts & Lockwood (2003), Louis (1980) and Ashforth (2000) argue, traditionally the meaning of career was to raise up in hierarchical structures and improve the status brought by high positions, but nowadays career indicates individual's value in occupational markets. Therefore, it is important for individuals to obtain core competences and expertise that organizations are likely to pay for in the career markets. According to Hall (2004), building networks and expanding own knowledge and expertise is vital in modern occupational life.

These changes in careers have provoked discussion of boundaryless careers (Defillippi and Arthur 1994; Eby, Butts and Lockwood 2003), term created to describe career which varies from traditional sense; it means a career that can be something outside organizational boundaries and beyond the traditional hierarchical development. As Ashforth states (2000, 8), coherence of roles and role identities become more important in a complicated occupational life and individuals are responsible for maintaining the sense in meaning, control and belonging themselves. Defillippi and Arthur (1994, 320) take part to the discussion of constructing role identities in such boundaryless careers and argue that ideal would be when identity is constructed independently, unboundedly to organizations,

hierarchies or other constraints and as an accumulation of individuals networks, knowledge and expertise.

2.6 Who is a leader

In the introductory chapter the history of leadership in academia was briefly handled. For summary, the leadership literature has come from emphasizing inherent leadership traits and sole leaders who guide, rule and exercise power on followers to shared, team-based co-leadership with a follower centric view. All theories along the history of leadership have emerged from criticism of previous theories to co-exist and add more value, accuracy and equality to them (e.g. Ford 2005; Parry and Bryman 2006; Busse 2014). As Yukl (1986, 252) argues, in the history of leadership literature, leadership has been defined and examined through the lens of individual traits, behavior, relationships between roles, perception of followers and influence on them, achievements on goals and relationship on organizational culture. This states that the definition of leadership is influenced by the individual who defines it and it is dependent on the current knowledge, assumptions and trends.

Interesting and valid point in the leadership studies is the view that authentic leadership theory offers. According Luthans and Avolio (2003), individuals must live their lives and learn from the negative and positive events to become authentic leaders. The theory of authentic leadership seeks the inherent leadership of individuals and the concept of learning by doing suits perfectly to the setup of expert leaders; the journey from expert position to leader position, whether it is a short or long path, teaches individuals how to play the new role. Luthans and Avolio argue that leadership could be a combination of inner abilities and development of them along the way, strengthening the resources with self-awareness. Therefore, leadership can be seen as subjective, individually modified way of interacting in organizations. Subjective view on leadership can be derived from the theory of authentic leaders, but originally the theory is seen as a heroic, individualistic representation of leaders and leadership.

As stated before, although researchers have devoted time, effort and resources to study and understand leadership, no unanimous definition has been agreed as researchers attach their personal preferences and perspectives to the definitions (Yukl 1989). However, leadership is more or less agreed to be individuals action of influencing others to achieve shared objectives (e.g. Yukl 2006, Northouse 2010) and the basic definition of leadership is perfectly capable for this research too.

This thesis focuses on the path from an expert to a leader. The concept comprehends equally managers and supervisors without separating them from leaders, although these terms have connotation nuances. The path examined is involving all individuals who have changed roles from experts to leaders, managers, supervisors or anything they like to call themselves as long as they have subordinates or managerial tasks in their workload. The distinctive pattern in role transitioning is more important than the definition of the right term when looking at the interviewees. Individual is considered as a leader in this case if he or she has subordinates from the same field he or she has education and experience on. The term should probably be from expert to supervisor, but it is seen that the purpose and the phenomenon is similar to the original terminology. Hence, supervisors, managers and leaders are handled the same way in this research.

However, in literature, the discussion of diverse roles of managers and leaders has been going on for a long time, partly due to the phenomenon of romance of leadership, recognized and named by Meindl, Ehrlich and Dukerich in 1985. Authors researched various publications in the field of leadership and found that leadership is understood in romanticized way in literature. There has been a certain positive aura around the concept of leadership, and it has been seen as a panacea to all problems in organizations. While Meindl et. al. wonder whether the mystique and romance is necessary to sustain followership, other critiques such as Collison, Jones and Grint (2018) argue that the romance of leadership has far-reaching influence on leadership research and criticism towards the phenomenon should be remembered more often. According to Collison et. al., romance of leadership has raised a search for heroes which may cause gender and ethnicity issues to emerge in leadership literature.

Whereas leaders have been put on a pedestal and worshipped in literature, the reputation of managers has been simultaneously lowered. Selznik published an influential book in 1957, *Leadership in Administration,* where he started the conversation of separate roles of managers and leaders. According to him, leadership functions are needed to achieve goal of every organization, which is turning them to institutions. Selznik made the differentiation between institutional leadership and administrative manager and stated very clearly that executive has a responsibility to embody institutional leadership and transform the organization through it. Later, Zaleznik (1977) strongly separates managers from leaders, arguing that the difference between these two is vital in organizational life; he sees managers

as control-seeking order-loving problem solvers who think in a rational and functional way, whereas leaders are heroic artists, who actively risk themselves taking inspirational leaps to explore opportunities that others cannot see. Zaleznik's view is very contrasted and provocative, but the discussion has been taken seriously in academia and similar setting between leaders and managers can be seen in literature (Busse 2014, 54). Publications after Zaleznik's article seem to recognize the difference between the two (Bennis and Nanus 1985, 21), but also their relationship with each other. For example, Kotter (2001) states that the roles of leaders and managers are sure different, but complementary. Yukl (1989) states that there is no reason to stuck with the differentiation; he has built a framework of variables affecting to the end result of leadership and he counts managerial work a vital part of it. Terry (1995) seeks different ways to understand the dichotomy of leadership and management than a bare division to two contradictory concepts and joins to the thought of Kotter that the concepts could be complementary to each other.

2.7 Expert leaders

As stated above, in this thesis the concept of expert leaders is broadened to involve supervisors and managers, although the terms are commonly separated in literature. The justification for the broader take on the concept comes partly from semantics; in Finnish language, the terms leader and manager are the same and used without greater separation. As the scope of this thesis involves Finnish expert leaders, both English and Finnish languages are tangled together in the interviews and in the writing process. In addition, although the expert leader theory is primarily addressing the upper-level leaders such as CEO's, the core of the concept prevails even if it is handled with wider perspective; it is about combination of expert role and leader role, a professional identity that involves both expert tasks in certain field and human resource, leadership and management tasks.

Amanda Goodall (2012) has done seminal work researching expert leaders. She has created a framework of the concept which is presented below in figure 5. Goodall presents the concept as a function which has three factors: inherent knowledge, industry experiences and leadership capabilities. These three parts of the function are divided into two, inherent knowledge consisting technical knowledge of the core business and high ability in the core activities; industry experience consisting the practice and experiences gained through the tenure in certain field and leadership capabilities including inherent characteristics and skills

in the field of leadership and management, acquired from experience and education. All of these factors are related to certain core business of an organization.
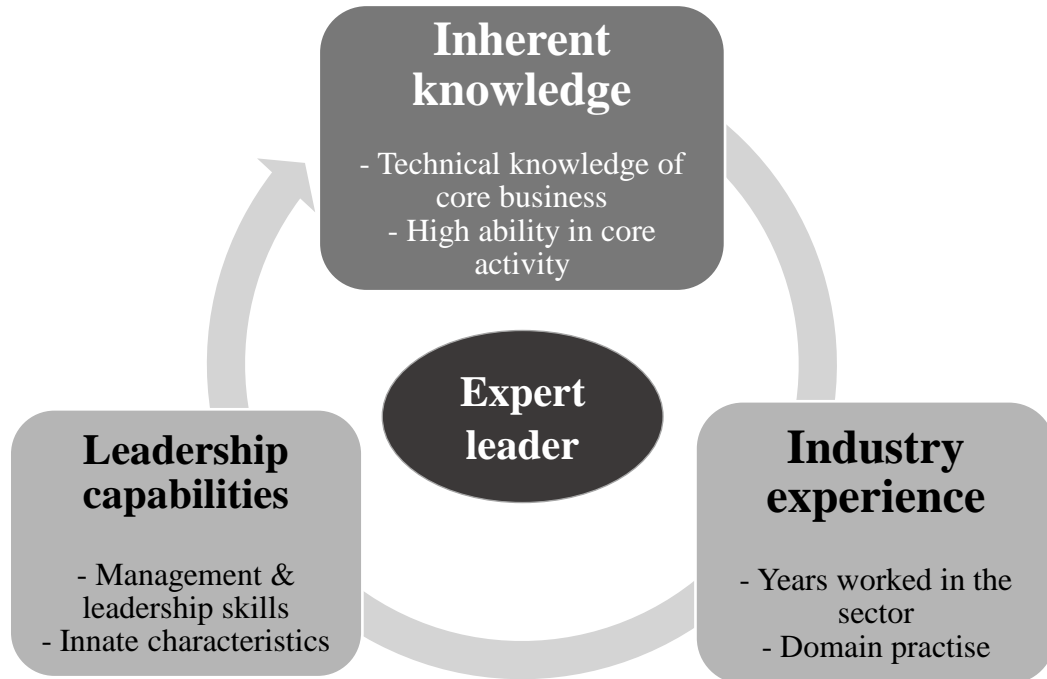

Figure 5: The framework of the theory of expert leader (adapted from Goodall 2012)

Goodall's theory is thorough, but curiously it has one essential feature conflicting with the literature – the view of organizational dependency of expertise. Goodall handles expertise understandably as a knowledge and experience on the core matters of a business, but in Defillippi and Arthur's (1994, 320) theory of boundaryless career, authors present an idea of expertise that is not bounded to organizations but as a synergy of networks, expertise and knowledge on certain field. However, neither sides are excluding one another, admittedly they are complementing each other and both views are needed to understand the concept thoroughly.

There is an additional part in expertise comprehending the core business of the firm because expertise may also involve knowledge on the business model and organizational culture, i.e., part of the expertise may also be bounded to the organization. Defillippi and Arthur suggest that ideal for an expert leader would be "general" knowledge on the industry and on some precise topic, which can be utilized in multiple organizations. However, examining expert leaders in one organization at the time, expertise defined by Goodall may be more accurate as it involves the expertise on endogenous matters of the organization.

3. METHODOLOGY, RESEARCH PROCESS AND DATA COLLECTION

The goal of this study is to surround the concept of expert leader with literature review on related elements and empirical research executed with interviews to gain in-depth understanding on the concept. The research will lean on two frameworks: one mapping the expert leader path and one seeking the essence of identity changes along the path. The questions guiding the research are examining the success of the transition from an expert to a leader with emphasis on the structure of the path and elements that may be related to the career identities.

This chapter will shed light on the methodological aspect of the research by clarifying the reasoning behind the methods, presenting the data collection process and explaining the interview structure. In the end, the reliability and validity of the research is discussed.

3.1. Methodology

Examined concept and research questions lead the theses to take a qualitative approach, which perfectly suits the goal of examining the phenomenon of expert leaders in a holistic way. Hirsjärvi et. al. (2009) state that in a qualitative approach the emphasis is on the individual experiences and insights, which are a natural part of the concept of expert leaders and the narrativity of career stories. The research will seek understanding of the small sample, leaving room for individual and subjective elements of the concept to emerge. The underlying epistemological approach of the research is the interpretivism with the core conception of the subjectivity of the theme; there are various socially constructed realities of interviewees that have an influence on the collected data. Interpretivism notice the influence of social constructions and subjectivity to the comprehension and knowledge (Avenier and Thomas 2015). The experiences, subjective elements of role theories and the feelings depict the need for approach that subtly allows social constructions to blossom during the research – after all, the main research question is very much tied to the subjective elements of human experience.

As the concepts of expert leader and role transitioning have been defined and examined before, this research represents theory-based content analysis. The theory-based analysis is defined to be a method for studies that have pre-assumptions on the concept and expectations

that will affect to the focus and direction of the study, therefore it will suit this research best. This research will take previously acknowledged theories from the field and utilize them in the analysis of career role transitioning.

The research is based on the interviews gathered deliberately for the research purposes. Interviewing is traditional and well-established research method for qualitative research (Hirsjärvi et. al. 2009), and it is right in place with the theme of career transitioning; as Bruner (1987) and Ibarra and Barbulescu (2010) argue, the important element constructing identities is the self-narrative. The interviews aim to gather data of the phenomenon and they were executed with semi-structured method. In the given time limit, there was no possibility to execute a deep interview with multiple meetings with each interviewee. However, the interviews imitated natural, open conversation within the theme and the structure of the interviews was merely leading the conversation. As Hirsjärvi et. al. (2009) state, in theme interviews there are planned aspects such as the topic of the interview, the form and order of the interview questions, however the interview aims for a natural discussion and therefore the order and the form of the questions may vary between the interviews. This allows the discussions reach deeper levels and improve the quality of the answers.

3.2 Research process and data collection

The research process of this thesis is depicted briefly in figure 6 below. It follows the traditional research process model, elaborated e.g. Hirsjärvi and Hurme (2001, 14), and found from various sources as the basic execution of majority of researches. The model is quite straight-forward: first there is a preliminary research problem, which will be defined in the second phase. Definition of the research problem and the research questions mark an important phase as they influence to the whole research project later: the methodology, the data collection and the focus areas in the analyzing phase. The next phase is data collection and analysis, after which comes the concluding and reporting phase. The last two phases form the empirical part of the research.

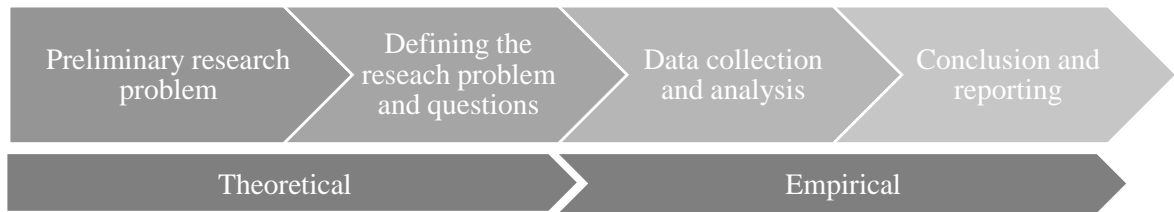| Preliminary research problem	Defining the reseach problem and questions	Data collection and analysis	Conclusion and reporting
Theoretical		Empirical	

Figure 6: The research process (modified from Hirsjärvi & Hurme, 2001)

Considering this thesis, the first two phases before the data collection and analysis include thorough examination of expert leaders and the topics around the theme. The deliverable of these phases, the literature review, builds a theoretical background for the study, the platform that empirical analysis of the last two phases will build on.

The most important factor selecting the interviewees was the element of transitioning from expert role to role that has at least partial supervisory, managerial or leadership side to it. Selecting various fields of work was also a priority so that there was no branch over-emphasized. In that way the phenomenon was highlighted rather than the context. The branches were selected randomly based on the writer´s preferences.

The interview was semi-structured and fairly open, including 6 themes to guide the conversation. Keeping the interviewing method as open as possible enabled simultaneously keeping the focus in the themes that were vital to the research questions but leaving room for self-reflection and open conversation within the theme. The two frameworks used in the research guided the layout of the interview questions. The interviews were executed all from distance via Microsoft Teams and phone, and they were recorded with a permission of interviewees.

Both genders were intentionally equally represented in the sample, 50% were men and 50% women to enhance objectiveness and generalizability. Table 1 summarizes the data from interviewees; their ages, the sector they are working in and their gender. The interviewees were renamed from I1 to I6 for simplicity and convenience throughout the text.

Table 1: Summary of the interviewees.

Sector	Age	Sex	Interviewee
Early childhood education	34	Woman	I2
Pharmacy	27	Woman	I5
Military	45	Man	I4
IT-sector	55	Man	I6
Paper and paper board	51	Woman	I3
University	43	Man	I1

The interviews were executed in Finnish and the approximate length of an interview was 1,5 hours. The records were transcribed before thematic content analysis, which was utilized for analyzing and organizing the data. The interviews flowed through six themes which guided the organizing process of the data. The aim was to keep the process of analysis as open as possible to let all the opinions, notions and comprehensions emerge. This method was recognized to be a benefit of a smaller sample size.

For the thematic content analysis, literature was utilized to understand the steps, main source of guidance being Nowell's article *Thematic Analysis: Striving to Meet the Trustworthiness Criteria* (2007). First, the transcripts were examined to identify common themes. The discussion with interviewees vaguely followed the interview questions, which could be considered a strength in this type of study; interview questions always enclose interviewers' interpretations, and the objectivity cannot be truly diminished, when there is a background of already established theories and literature on the topic. Open discussion that gives answers to the questions but evokes topics around the questions can be considered fruitful source of new insights related to the research questions. This, of course, was shown in the content analysis as various themes emerging and increased workload.

3.3 Reliability and validity

Reliability and validity are common measures that mark the quality of the research. Reliability is understood through repetitiveness: if the research can be replicated many times while the results support each other, the research can be seen reliable. Reliability marks the soundness and consistency of the research, which is derived from the method selection and analytical profoundness. Validity, on the other hand, refers to the research methodology and its place in the study: if it measures the subject research intends to study. Both reliability and

validity takes place in assessing the trustworthiness of the study. (e.g. Rose & Johnson 2020, Yin 2003)

Regarding this thesis, there are factors that increase the reliability and validity, but there are also decreasing aspects that need to be addressed. Trustworthiness of this research has been examined through both Yin (2003) and Rose and Johnson (2020) profound articulation in the field of quality of qualitative research. While Yin addresses the quality of case study, Rose and Johnson offer more general examination of all qualitative research.

In this thesis, validity is improved by taking a sample which included interviewees working in different industries. Although qualitative study cannot be generalized in the same sense as quantitative with larger sample size, a sample with varying industries can be seen to emphasize the phenomenon more than sample from one specific field.

However, validity in this study is not exactly strong in the traditional sense of reliability. The same outcomes cannot be guaranteed because the topic is highly subjective. The results would vary significantly even when studying the same industries the second time if the interviewees would not be the same. As the interview questions are presented in this paper, it is possible to replicate this study. In addition, the career narratives and the current positions are described as informative as possible, which means that similar interviewees for replicative study could be found. However, as stated before, the results of this study are subjective and therefore not generalizable. Nevertheless, the results of this study are aligned with literature and found from other studies, which implicates that outcomes of the discussion could be found when this type of study is replicated.

Limitations of the sample size is restricting the reliability, there are only 6 interviewees in the study, and they were interviewed only one time. Multiple in-depth discussions with each interviewee would deepen the analysis as well, and panel data consisting of many years of discussions would bring the study to a whole new level and bring value to the outcomes. In addition, not many actions that Rose and Johnson (2020) suggest, such as member checking, are done for improving the trustworthiness in this study, however, the critical reflexivity and subjective positionality is included to the research process. The researcher has critically analyzed the subjectiveness of herself considering the research problem and handling the subject matter. The social markers of the researcher, including e.g. race, sex, gender and socioeconomic background, has been analyzed against the results and possible biases of the

researcher has been tried to diminish to ensure the highest objectivity. As Rose and Johnson (2020) argue, increasing the awareness of biases in the research process help increasing the validity of the research. The main research question of this study does not focus on race or gender issues, and it also does not enclose the history outside the career life, which simplifies the examination of researcher's biased subjectivity. Researcher also actively intended to refer the interviewees as much and accurately as possible to highlight the voice of each individual and make it possible for the reader to see where possible interpretations of the researcher has derived from. Both Yin (2003) and Rose & Johnson (2020) endorse transparency in research process, which the researcher in this thesis has tried to increase as much as possible.

There are also language that needs to be considered when examining the trustworthiness of the study – the interviews were executed in Finnish and transcribed to English during the analysis phase. This needs to be considered as an issue for reliability of the results. However, the interviewees may have brought up more significant and deep insights with their native language, which is Finnish, compared to using English, especially as the study theme is subjective and career narratives had their emotional sides as well in some cases. Recording the interviews can be considered beneficial for reliability.

The interview questions were not sent in beforehand. I1 pointed out that some questions were subjective and complex, perhaps needing more time and thought to be answered. He mentioned that he cannot assure that his answers would stay the same if they were collected two months later, which again well underlines the subjectivity of the results.

4. EMPIRICAL RESULTS AND FINDINGS

This chapter will present the results obtained from the six interviews, and the results are organized within suitable themes to accommodate the analysis of them together with the frameworks in the next chapter. Interview questions can be found from appendices (appendix 1). In this chapter the results are only brought up, giving the analysis a clear stage in the discussion and conclusion part.

4.1 Structure of the career path

The interviews mapped career paths of interviewees to gain understanding of the structures that expert-to-leader transition may hold and distinguishing differences and similarities between the interviewees. It is obvious that each person has their own individual career paths, especially different industries and working places offer differentiated career possibilities and each induvial has their own personal interests, but that is just one side of it. Interestingly, there can be found some similarities in very different career paths in different industries.

The career paths of each interviewee are presented below. The identity matrix of Ristikangas et. al. (2008) is utilized in this part; the precise career narratives of each interviewee and the identity matrix together construct an actual image of the career path and roles that interviewees have gone through to get to the position they are currently in. Regarding the identity matrix it is very important to notice that X- and Y-axis do not measure the amount of knowledge of an individual, but the proportion of expert role and leadership role in the positions.

4.1.1 The university career

I1 describes that his career has somewhat naturally proceeded, sort of drifted to the point he is now. However, already before graduation, he insisted on making his master's thesis of the subject he thought it would be useful to know in the future in working life. With the subject being fascinating, he wanted to apply to work in the university to learn more about researching. He was hired to be research assistant and later a researcher in a certain project, but the project ended up being cancelled. Therefore, the position was changed to be a dissertation researcher on the same field, which included also teaching. With his own words:
"Later, it was only natural to continue in the university teaching" .

He was gradually going up in the identity matrix from stage 1 to towards strong expert role in stage 3. The career continued in the university with varying titles while the work stayed rather similar, until he had an opportunity to apply the position of associate professor. He was selected to the position, which is now his current work role. The work description changed significantly, as he simultaneously was asked to take on supervisory work as a team leader and a head of one of the university's research environments. It was presumable that supervisory role would come with the new role but I1 describes it was still a surprise how much leadership tasks it involved. He mentions that there was "a sense of responsibility" in taking the leadership tasks seriously. He also discussed how he felt change in the expectations when the title changed – at least his with own expectations.

I1 describes his current role that the main role is an expert in his associate professor role, but the supervisory, managerial and other tasks are taking considerable amount of time and effort from the expert tasks. The tone slightly changes in the discussion and the theme keeps coming back; there is uncertainty in the air whether the expert role is the one he wants to fulfill more than leadership role. He certainly sees the supervisory role important and feels responsibility to take the leadership tasks seriously and have success in them, but the current situation can be seen to be between the stages 4 and 5, which the figure 7 elaborates as the yellow line fluctuates between stages 4 and 5.

I1 describes expert role more pleasant to him but says strictly that he does not experience leadership role unpleasant. He tells that his professional identity is still taking shape and at this moment there exists at least a conflict in resourcing: external expectations from the organization are related to the expert role, whereas expectations from the leadership role he describes different. Otherwise, he experiences that the roles are not conflicting by nature and one can simultaneously be successful in both roles.
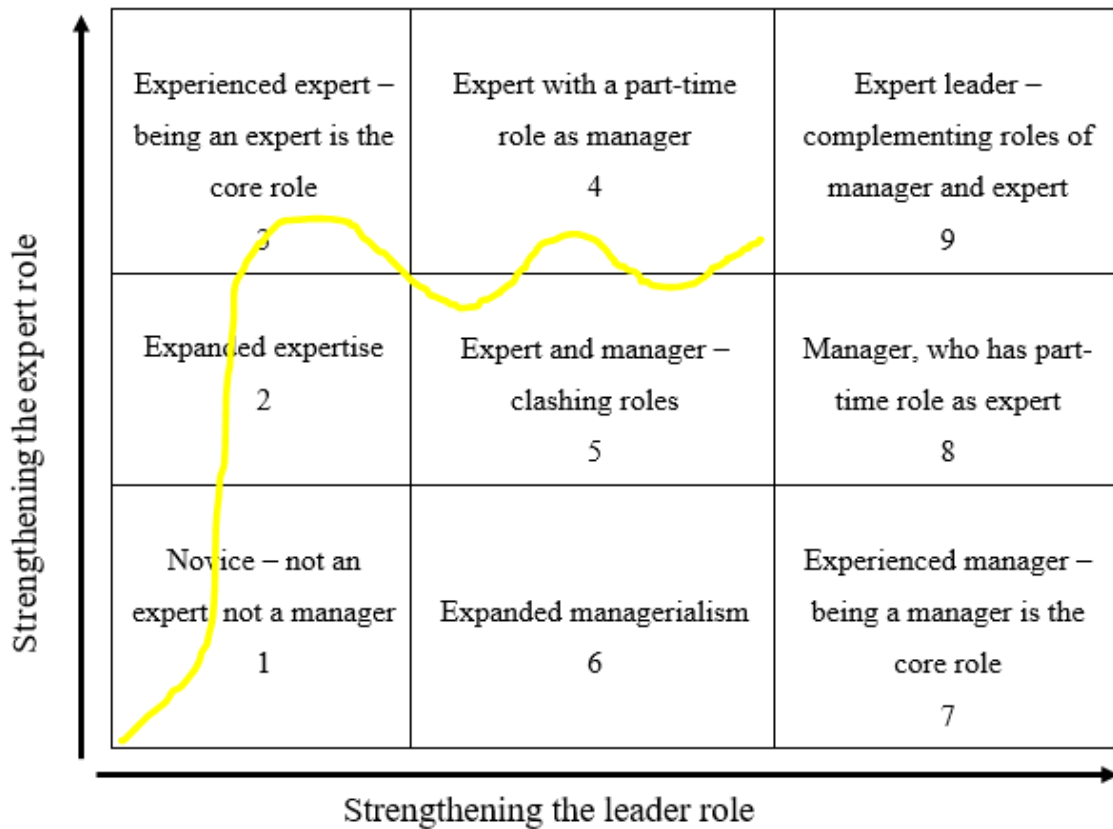
Figure 7: The career path of I1

The current situation seems to be heading towards the stage 8 or 9. However, where there was a discussion whether the role of a supervisor is the best role for the interviewee, the career could turn towards the stage 3 if preferable expert role would be offered.

4.1.2 Early childhood education

I2 feels that she has found a right field of work for her, and it shines through her passionate career narrative. She started to develop her expertise during her studies by doing surrogacies in the same field and had a great comprehension of the work and worksite well before stepping to the work life. I2 names the surrogacy that was placed the third year of her studies one of the most significant periods in her career; she picked up good ideas and saw also how she would not want to execute her occupancy. After the graduation of bachelor's degree, she had her first position as an early childhood educator. During the position she felt that her expertise grew, and she might have found already her own style of educating. Throughout the narrative there rises a importance of colleagues and co-workers.

Due to the external circumstances, she had to move to another city and find another position to work in. She applied to fixed-period position in special education and was selected. She tells that the position had a significant influence on her expertise and enthusiasm toward the work. After the period, she applied permanent position as an early childhood educator, which she got and has been working in the same kindergarten ever since. During this position she studied a Master's degree in Educational Sciences and after the graduation she was offered a position of an assistant manager of the kindergarten, which she was delighted to take. The position as assistant manager is her current work role and she feels that this is something she wants to do, and later wants to develop her managerial skills to achieve the position of a manager of the kindergarten. She describes that during the change of the title there was a change also in the environment – she noticed that she took more responsibility of her behavior and output and was experiencing a change in the way her colleagues interacted with her after she was officially hierarchically in supervisory cast. The interview with I2 also hold a discussion about fitting two quite different roles together, and she mentions that she is constantly seeking, more when she first started and less as she has more experience, about what is expected from her and how to balance between her subordinates, supervisor and her own expectations while doing the tasks set for her.

I2 describes herself as a natural born leader, with a desire to take effort to manage, organize things and take responsibility of people. However, the progress in career is not that simple – I2 depicts the positions of kindergarten teacher and a manager in the industry being quite far from each other, and passionately tells that she loves working with early childhood education, where she wants to develop her expertise. Earlier in I2's tenure in the kindergarten, the manager position opened for applying, and she experienced encouraging from her colleagues to apply for it. In that time, she did not want to have that dramatic change away from the hands-on education work but mentions that the encouraging and recognition felt good and has affected her self-confidence in her work. She has decided to wait for the feeling that tells her to strive to the full-on managerial roles in the industry, where the childhood education role diminishes. She has already taken on other responsibilities in her career such as obtaining industry insights and knowledge and passing them on to other
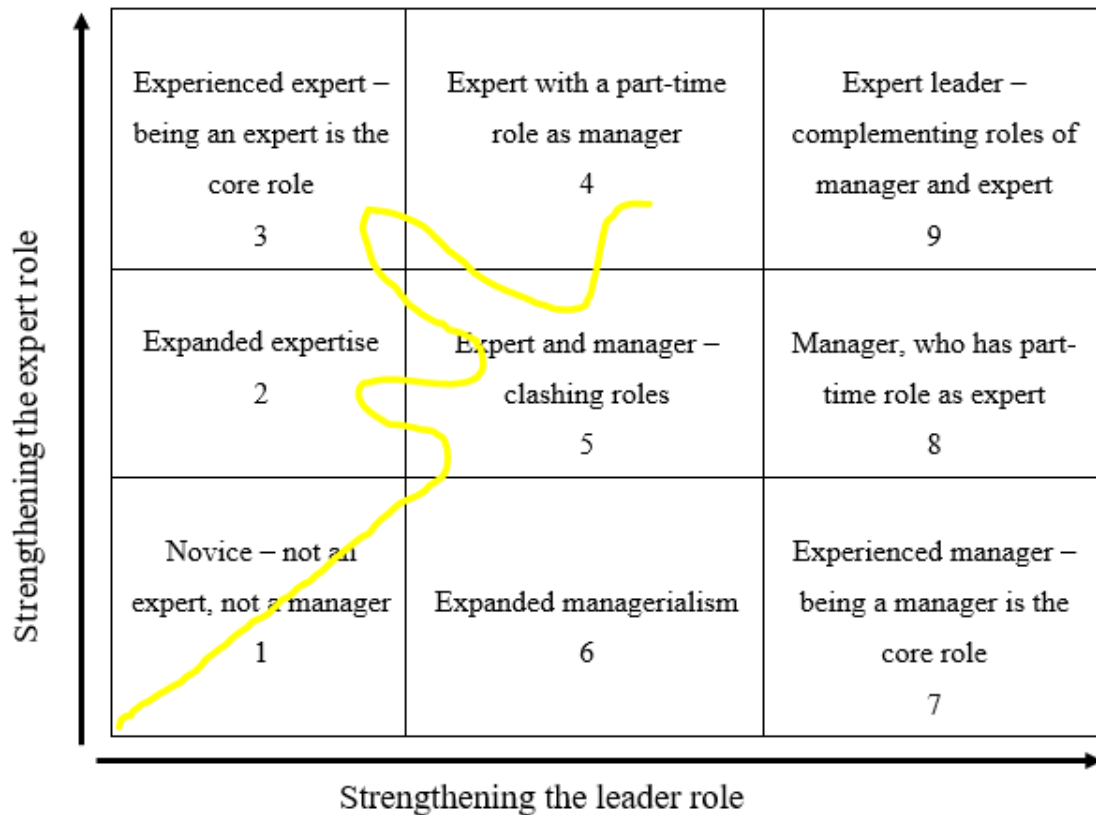
educators.

Figure 8: The career path of I2

From the figure 8 can be seen that the career development of I2 takes a small leap towards the stage 6 as the natural drive for managerial and leadership tasks is in the background. I2 describes that she has had managerial tasks given to her by the head manager of the kindergarten in the holiday seasons. Being interested in the field of leadership she expands her managerialism and leadership knowledge. The expertise has been developing but she feels that she has still a lot to learn. The career development line can be seen to currently reach the stage 4, as she describes herself having balance with the two roles and she is happy to be in the position she is now. The line of the development weaves between different stages, entering also multiple times in the stage 5, as I2 has had different managerial tasks aside of expert tasks, and sometimes she has been unsure about her place in the organization and the behavior and tasks she should pursue. Career could develop towards stages 7 or 8, where the managerial role is more emphasized than the expert role. There might be a danger to land on the stage 5 if there is difficulties to decide which role is more important for her if she feels the desire to lead but wants to keep her expert role as a kindergarten teacher. I2 describes

that throughout her position in the assistant manager she has been tackling with the role clashing issue, which the career path line indicates when it constantly enters the stage 5 as it proceeds.

4.1.3 Paper and paperboard industry

I3 had interesting beginning for her career as economic situation in the 90's made career building almost impossible. Hence, I3 tells that after she had graduated from commercial college, she went to study further global marketing to a university of applied sciences. When she finally got her first permanent position, it involved tasks that were perfectly in line with her studies. After four years being in the same position, she felt that it was time for a change. She quickly got a transfer to another city due to family reasons to a fairly similar position. However, the position was in a smaller unit than before, so she got to do tasks with broader variation and that really uplifted her expertise, which was noted in the organization as she got to educate younger workers. She describes her experiences in a smaller unit useful both for her career but also for her self-awareness – she learned that she enjoys independent work and having her own territory, a position to fill how she sees the best. She also familiarized herself how to take charge and noticed that she was fairly good at it.

After 8 years she felt again that she was ready for new challenges, and she tells that only reasonable option to proceed in the career was to study more. She finished her master's degree on economic sciences she started to think her options; was there any interesting positions inside the organization or should she start to seek other possibilities outside the organization she worked for. At the same time, there was pressure coming within the organization to move to another city and to her surprise, her own supervisor offered her a position similar to her current one but with supervisory tasks as well.

The decision to accept the position was not simple, but she felt that she had organizational support and her expertise to lean on. She describes that the organization took care on her transition to the new position with introduction to the tasks, support to really play the role and trusting her insights. That is the position she works currently in, and it involves both expert tasks as a sales manager and managerial tasks as a head of customer service. She feels that her role is still more expert oriented, especially as the field of operations crave for experienced manager. The complexity of the operations and her expertise on the field makes her role more of a coach and an expert than a plain manager. I3 describes her managerial

duties mainly routine processes and administrative tasks, whereas the real guidance role comes from the operational tasks that her subordinates tackle with.

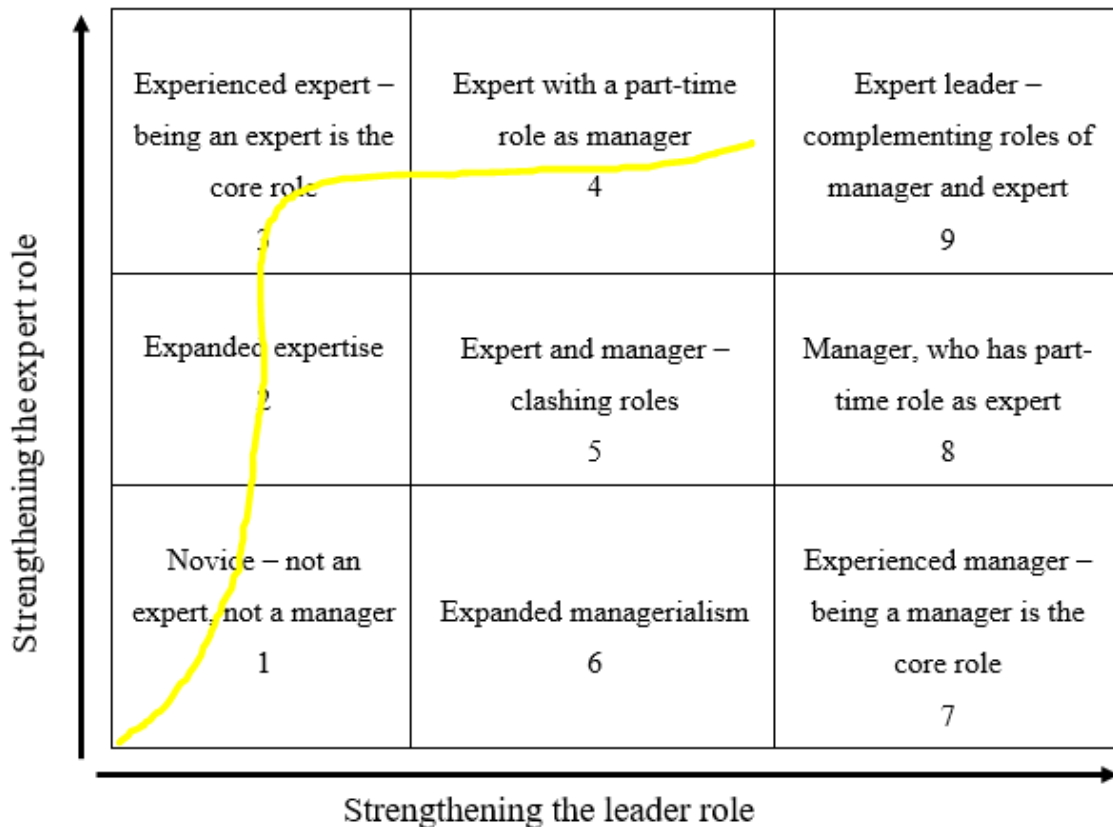| Strengthening the expert role →		
Experienced expert – being an expert is the core role	Expert with a part-time role as manager 4	Expert leader – complementing roles of manager and expert 9
Expanded expertise	Expert and manager – clashing roles 5	Manager, who has part-time role as expert 8
Novice – not an expert, not a manager 1	Expanded managerialism 6	Experienced manager – being a manager is the core role 7

Strengthening the leader role →

Figure 9: The career path of I3

In the identity matrix in figure 9, I3's career would look like in the picture above. She had an opportunity to educate herself well to the field and then she worked in the same organization a long time before making the transition from an expert to a leader. She describes that the managerial tasks are a side role and that is what the organization needs right now. The yellow line of identity work has bypassed the stage 5 as there was no pondering of clashing roles. Organization has supported well in the transition with trust and education. However, it is always possible to visit in the stage 5 if the requirements change or individual's demands for the role and self change, but for now the career seems to go steadily towards the stage 9. I3's career can also proceed to stage 8 if the need of the organization changes.

Viewing I3's career narrative against previous narratives, it comes clear that some careers are more self-imposed than others. This marks an interesting point of view which is

discussed in the analysis. I3 describes in the interview that she has always been quite ambitious and self-determined but have not always aimed at being a supervisor, although being determined to proceed in her career. Nevertheless, the aspects of supervisory work are motivating to her, as she gets inspired making her own and other's work more efficient and being able to develop working life of others. In addition, noticing that not everybody wants or succeeds being in charge works as a motivator for her and encourages her to take on the role and carry the responsibility.

4.1.4 Military career

I4 has had a colorful career with many positions, and in a way his interview is different to others. He has jumped from an expert role to a leader role and vice versa, multiple times, due to the peculiarity of the organization he works in. The graduation from University of National Defense put him right to the position of vice manager in a military unit. He worked as a trainer for those who did their military service in the unit but had also a supervisory position for those who worked at the unit. After working as a vice manager for a while, he was raised to be a manager of the unit. He worked in that position for a while and then applied for a operation abroad. He got selected and even though the operational framework did not change, the work varied between commanding and enabling the commands to happen, being hands on in the command chain and writing reports. After the rotation he was directed to work as a head of a unit that is responsible of the education of small group of cadets. The role changed from educating those who are doing their service to education of those who have chosen military as their career; it was more fatherly guidance and teaching than faceless commanding and training – which required a change of whole educational role-identity.

Being in the position 3 years I4 decided to apply for another rotor abroad. He was selected again and worked there in an expert role, after which he returned to the former position educating students at the University of National Defense. After a while it was time for a new position, and he started to work at the university with a larger group of cadets and different perspective on teaching. Fatherly role changed to almost routine-like teaching of large masses with no close contact to individuals. He got to work a year in that position after the military organization proposed him to a position of head of unit that included trained reservists and other staff members. It was very different than his previous tasks and he describes that he was forced to reinvent his thoughts and role-identity in relation to

leadership. The position had a clear goal and time limit and once they were reached, I4 had a spark to step into the civil university to educate himself more on the subject that he has been dealing with during his career. He finished his studies in international politics and graduated in master's degree of social sciences in a year. He proceeded to a trainee period in Stockholm, which was quite a leap to take in his age and with his background, but he describes it was worth a try. After the trainee period ended, he returned to the military to attend a course for further military education. After the course he got a position as a strategy teacher and got to utilize his master's degree on Social Sciences. This took a year, after which he did another course for further military education and was assigned to have a position in military research center as a chief of the sector. The position involved leadership and expert tasks, but it lasted only 2 months as he was asked to proceed in his career to be assistant for commander of the army.

The position as an assistant was very different than he had experienced during his career; he had neither expert nor leadership tasks in the same sense than before. After that he moved to another interesting position: a leader of national defense courses. He describes the title being deceiving, he worked there more as an expert who implements the courses and gets to develop the system internally. He worked there two and a half years, after which he got asked to a position of the leader of reserve officer school courses. He describes the transition sudden, while he was left quite uninformed and expected to take huge responsibility almost overnight. The current role is more of a line manager in a line organization, however, I4 explains that the position holds much more – reserve officer school is a national institution and a part of a larger national entity. Some of the future leaders and politicians are educated also in this school, which makes the position of a leader in the school nationally significant. The leader of the school can be seen to be the highest expert on the field of military training and most importantly, the leader has to be alert and on top of the education, as the responsibility is significant. When the importance is on the expertise, I4 describes that significant amount of time in the role is devoted to human resources and education.

Although he feels that only recently he has reached the point where he can say he is up to date and learned his role, he is extremely happy about the position he is in. He describes that working in the same level in other positions in his organization would include less expert work.

I4 experiences that he has gotten 95% of what he has wished for in his career. He describes his input on the career transitioning being about half and the system having half of the input. He has known what he wants and has been aiming for that. His roles have been a trainer, an educator, a leader and a teacher, but the context has varied more. All the transitioning has been vertical, and that has been rewarding but also distressing as the responsibility grows and the pace for the transitioning is so fast – he probably has to change to a new role in 1,5 years.

It was difficult to draw career path with identity matrix of Ristikangas et. al. A chameleon-like career with various very different positions would not work with the idea of a line indicating a career path. Reaching the stages in unorthodox order makes it difficult to draw a line – numbered dots could depict better the transitions all over the matrix. As previously mentioned, the Y and X axis also cannot be seen as competencies or knowledge in this case, because drawing the line to previous stages does not indicate the loss in skills or knowledge. Below in the figure 10 the identity matrix holds quite a unique line for career path.

Experience expert – being an expert is the core role 3	Expert with a part-time role as manager 4	Expert leader – complementing roles of manager and expert 9
Expanded expertise 2	Expert and manager – clashing roles 5	Manager, who has part-time role as expert 8
Novice – not an expert, not a manager 1	Expanded managerialism 6	Experienced manager – being a manager is the core role 7

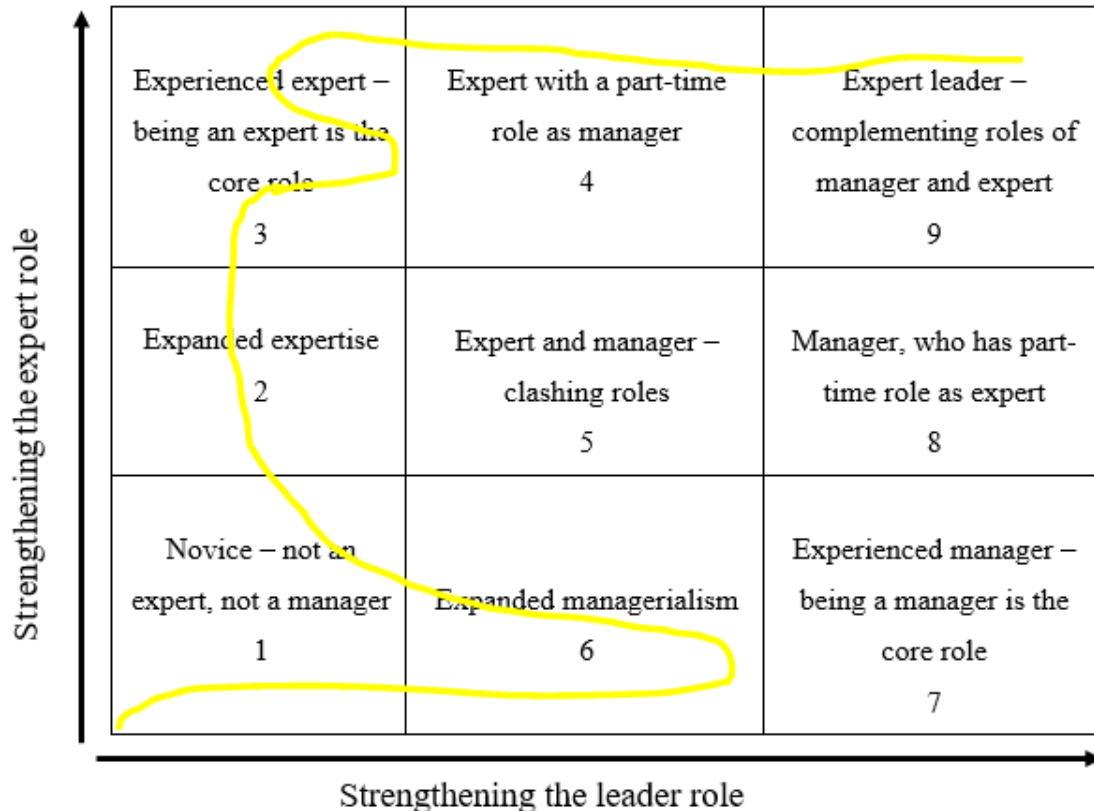Strengthening the expert role (Y axis)

Strengthening the leader role (X axis)

Figure 10: The career path of I4

4.2.5 Pharmacy career

After graduation in Bachelor of Science in Pharmacy, I5 got immediately a position in a pharmacy that she currently works in. First the work tasks included basic pharmaceutical tasks and customer service, and she was in a position to ask and learn a lot from the job. She worked quite low number of hours during the week as she simultaneously studied a Master of Science in Pharmacy degree. She was 3 years in the same position, during which she learned and experienced a lot and gained confidence from the field. Eventually, she ended up being the person newcomers asked for help. After the graduation for master's degree, she got promoted to be a customer service pharmacist, which did not include subordinates, but she got certain territories that she was responsible of, for example education of the team. Main tasks were the same as in previous position, but she got to surrogate her supervisors during night times and weekends. After being in the position for half a year, there opened a position of chief of customer service in the same workplace, which she applied and got selected. This change of position was major; she got 30 new subordinates and loads of new tasks, including responsibility of marketing, employee wellbeing and customer relations to the side of her normal pharmaceutical work. 30 subordinates means that she has a major supervisory role, and she describes her tasks in that field to be target discussions, following the targets and guiding the subordinates.

She feels like this career path is something she has been aiming for. She has also started to study leadership and management in University of Tampere, which indicates that she wants to widen her perspective on leadership and management and direct her career to suit that education and knowledge. At the moment she feels that her role is more focused on the leadership and management than expertise in pharmacy. She recognizes that her main role now is to guide others and make the processes and environment functional for others to work and she also feels that her expertise on leadership and management has grown while her subordinates have grown their expertise in the field of pharmacy. Her expressions towards this are very neutral as she would see this development natural to her, taking a step aside from pharmacological expertise to grow her leadership and management skills.
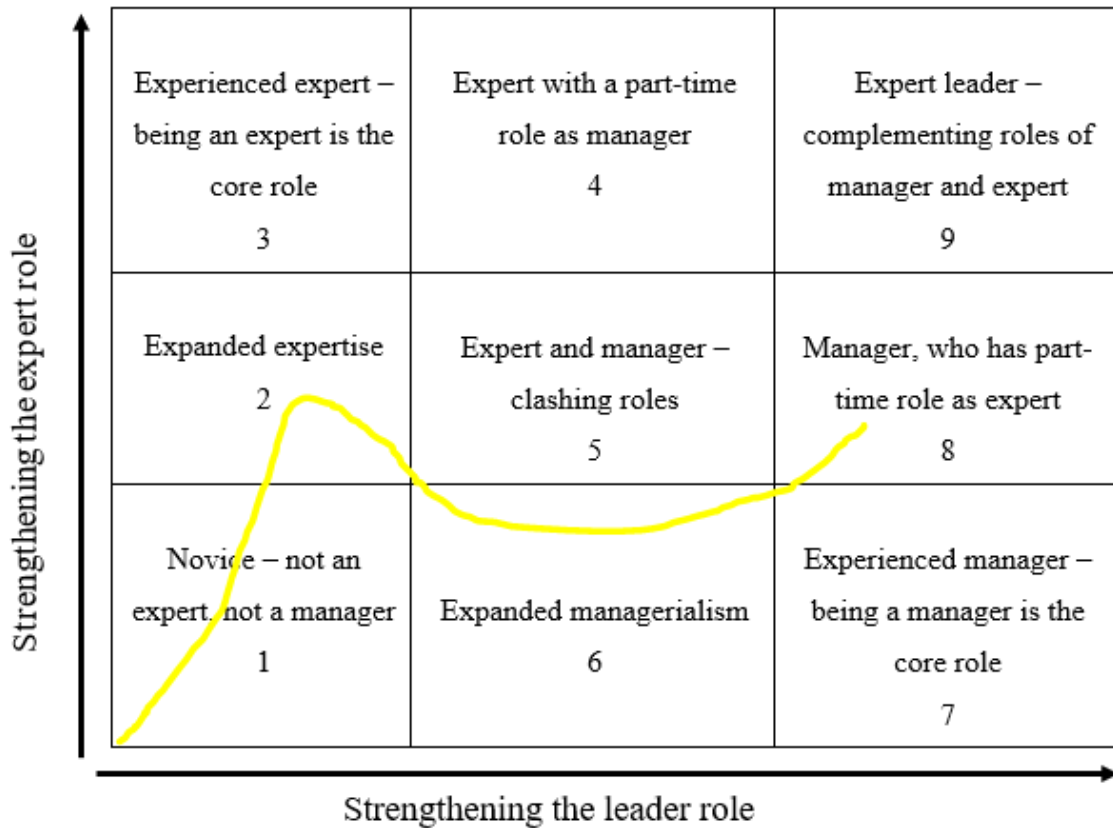
Figure 11: The career path of I5

Above figure 11 holds a possible identity matrix of I5. She has studied and worked to gain knowledge and experience on the field of pharmacy, expanding her expertise, but she has very early on guided her career to suit her desired career path as she identifies more of a leader than just an expert. Yellow line of identity travels through the stage 6 due to her studies in leadership and management and curiosity towards it and ends up in the stage 8, where she currently is. She describes that there has occasionally been times that she has doubted whether the supervisory role is for her, but the tone in the discussion indicates that it is just a part of the transitioning. She states strongly that this is the position she is glad to be in and in a longer term she feels that even if she has doubted, she recognizes that her strengths are in the supervisory role. In the current role she gets to utilize her expertise but has a main role as a manager. She could end up reaching the stage 9 or 7, depending on the work position she will reach, but as she says in the interview, she will head to the leadership or managerial role with pleasure and is willing to educate herself to reach those positions. She also describes the role transitioning being ambitious and it can be seen from the educational perspective; she aims to a certain path.

4.2.6 IT-career

I6 has had a career in a company that has grown with him. After graduating from one of the most first institutes that taught IT in Finland, he got a position where he could put his education into use. He got to work a year as an IT expert in an air ventilation company, but due to economic situation of late 90's, he lost his position. He was two months unemployed until his former colleague from the air ventilation company called and offered him a position in his start-up. He worked with the title of software designer for 20 years in the same company, but he describes the title deceiving; the position has changed as the company grew and tasks have been varying from software designer to a consultant for the product development. Due to the long career in just one company, he gained expertise in both the product and the company. He describes that the major role change was when he got promoted to the position he is now. He works currently as a production manager in a team which handles the product he programmed and consulted in the early stages of the company's journey. Taking the position meant that he had to lose his expert side of the work and concentrate on the supervisory and managerial side. The layout of the role transitioning is interesting: before him there was three persons trying to survive in the same position, without success. One by one they were transferred to new positions, and when I6 was proposed to the position, he was able to negotiate the demands and requirements of the role more suitable for someone to succeed in it, as he had followed next to others the struggle with certain aspects of the position. He feels like he was able to mold the position suitable for him and that he is now in a place where he belongs in the company, being able to utilize his knowledge on the product and the organization to supervise subordinates and develop the work of his team.

The requirements of the position meant that he had to give up his expert role more than he would like to. Throughout the interview he speaks about "nerds" with admiring tone, and he actually says that he would like his subordinates to take part of the managerial tasks which would allow him to take more of the "nerdy" work to himself. He expresses worry about losing his expertise in programming. However, he says that he has been building expertise in one specific area of the field that they are programming the product for, and he has been determined to be able to attend trainings and dedicate his time for something others did not appreciate in the company earlier. Nowadays he is considered as expert in that field which has now been recognized to be vital for the company. He states that he often describes himself as an expert, although being a manager has been easy for him.

In his opinion, he has just said "yes" in the right places and the career development with role changes have come naturally with the company growth. He describes that "*In a way, the product, the company and me have all grew together and it has been very natural*".
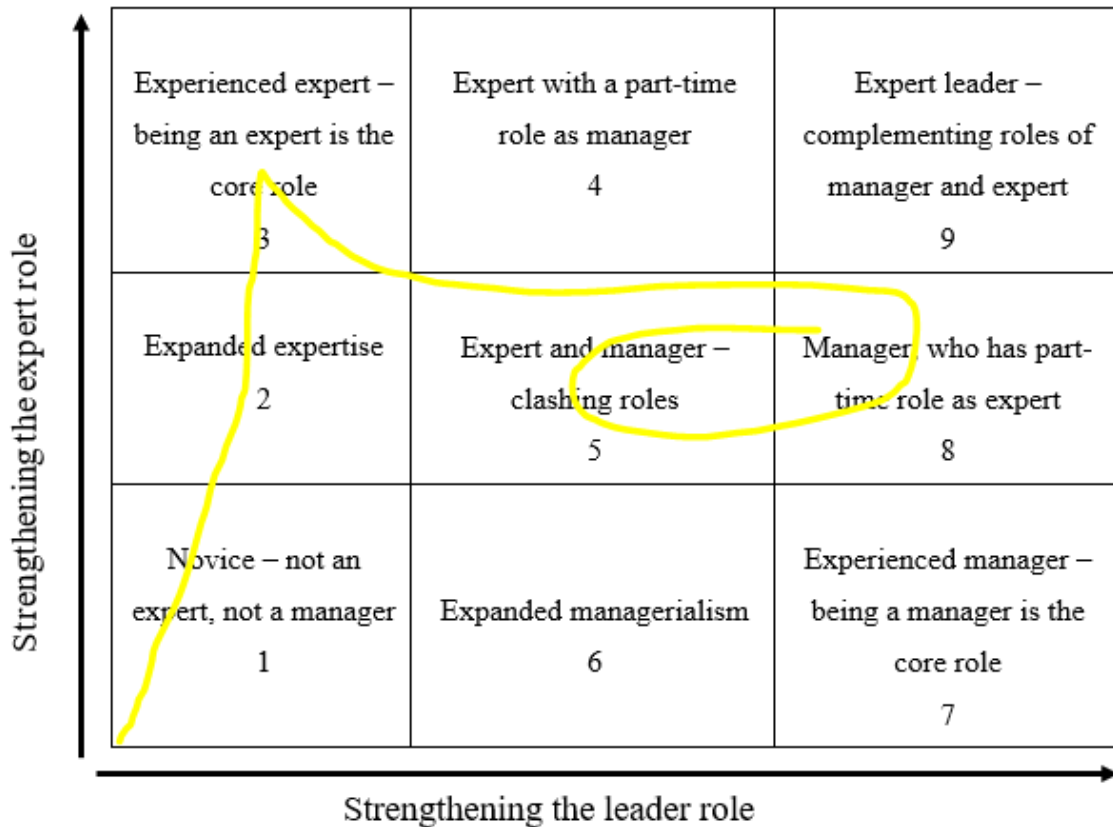

Figure 12: The career path of I6

The identity matrix could be looking something like the matrix above in figure 12, depicting a career I6 has had. Major expertise in the product and the field of business has grown during the long career in one company, playing various roles as a hands-on programmer and consultant for the product. The transitioning to managerial role meant that he had to give up the time developing his expertise on the field in order to survive in the managerial role. However, he still has his expertise on a special field, which indicates that he still has an expert role alongside the managerial role. The yellow line of identity circles between the stages 5 and 8, which describes the wish to transfer at least partly to the tasks related to the programming and utilizing the expertise. Although he feels that this position is made for him and he feels that he has succeeded in the role change, there is underlying atmosphere in the interview that he still wonders whether his desires are in the programming and "nerdy tasks".

The identity could be heading to stage 7, or it could be staying strongly in the stage 8. It seems that he will need to change his role in the company remarkably if he desires to reach the stage 9. It is also possible with a new role and some orientating on programming that he could reach the stage 3 again.

4.2 The influence of role change on identity

The second theme in the interview focused more to the identity changes accompanying the role changes during career with the goal of examining how the role change influences on the identity of the individual. All of the interviewees recognized that role changes do have a significant influence on the identity change. In addition, the interview data indicates that there is a certain distinctiveness in the identity transition when the role change is towards leadership or supervisory role.

First of all, based on the interviews, the longer time an individual has worked in the same organization, the more certainty is gained respectively to the position and therefore the occupational identity seems to strengthen. As I5 puts it:

"I have learned to trust my own decisions, that sometimes there is no ready answer, but this estimate that I would have to make is reasonable and rational for this type of situation."

It is very natural to start trusting oneself after building expertise and having the successful moments during career. According to the interviews, in expert positions, becoming senior expert really strengthen the expert identity and that brings of course responsibility of own decisions. This is also the case in the role change of becoming a leader; good experiences and being long time in the role strengthens the role identity, but there is a distinctive change in thoughts and identities when transferring from expert to leader. All the experts recognized the influence of the supervisory role to identity in the sense that they understood something else from the organization, something that separates subordinate-phase from the supervisory role. All of the interviewees described, without asking about the matter, that their views widened as they transitioned to the supervisory role: they understood better the organization and causalities that affect to the decision making. Changing roles and moving to different positions in organization gives very different standpoints to view the surroundings.

As I1 and I4 describe:

I1: *"Also, in the superior position one looks situations differently – one has to think the organization at wider perspective than before."*

I4: *"Thinking back 10 to 15 years, I was very critical [towards the organization] and I had almost assumption that everything is wrong. Now being in a leadership position I understand that I did not understand everything then."*

It came clear from the interviews that an expert role is experienced to be freer, as individuals are, at least seemingly, responsible only of their own actions and thus it is easier to bring personal identity to the office. In supervisory role there are more consequences and responsibility for actions, which causes individuals to reflect their actions and seeking to understand the causalities. Interviewees described the leadership playground to be wider and leader's actions seem to influence more people than experts', including his or hers own supervisors.

Being more aware and observative about own actions may be originated from the external position which is gained through the title change – rising up the hierarchical ladder implicates different meanings to individuals, but very distinctive, collective meaning to it is having more responsible, powerful position. Interviewees discussed about the responsibility to act in the supervisory role differently than before. Related to this, the link between supervisory role and social element can be recognized from the interviews: whether there is a difference between personal identity and a new role, or expert identity and a new role, something happens when changing role to supervisory role. I1 describes it as more controlled behavior, which comes from the widened view of the organization and the responsibility that comes with the supervisory role. I2 and I3 mention the same, they recognize that it is evident that moving to a superior role changes something inside but also outside of individual. The responsibility and the role boundaries affect to the way of behaving with subordinates, but also subordinates react differently when individual moves to the supervisory role. Both I2 and I3 describe that a supervisor has to have thick skin to cope with the changing attitudes of former colleagues, even friends.

4.3 The influence of colleagues and subordinates to the role change

One research theme examined the influence of the colleagues and subordinates to the new role. One distinctive aspect of transitioning to leader role is the human interaction and influential side of the role that comes with the transition. Based on the interviews, this aspect

rose to be important to consider in the role change, and it seemed to affect to the possible clashes within the role.

Many interviewees felt the change to a new role affecting to their former relationships with colleagues. Some interviewees had a situation where their former colleagues became their subordinates, which naturally changes the ascendancy. It was mentioned multiple times by various interviewees that being a supervisor requires having a thick skin, regarding the fact that being in hierarchically higher position changes the way of people's expectations and behavior. However, this was not the case with all the interviewees as some of the interviewees did not notice any change in their surroundings and how they were treated.

Another noticeable point from the interviews was that the human interaction aspect had a positive influence on engaging the new role and assimilating to it. Interviewees noticed that they were aware of their input and the significance of their new role to other people, aspect that expert role did not particularly have. They felt their role had an influential meaning and it is something that got the interviewees to think about their output in the new role; it was not just doing work for themselves but also taking other people into account and having an impact much wider than before. This seemed to affect to the role assimilation and eagerness to properly engage the role, because there was also other people's work at stake.

As I1 argues: *"Transition from the expert role to a supervisor role caused a focus change in my work and that may have added my feel of responsibility towards work. I feel one of the most important things in supervisory role is maintaining equality in leadership. Responsibility over people makes the role such important and makes you to take time for the role"*

Human interaction and influential aspect of the role was also described as a weight, almost a burden; something to think about severely before accepting the new role. It came apparent in some of the interviews that some subordinates and ex-colleagues may cause some problems and some human resource related work was expected not to be pleasant. All of the interviewees put greatly weight and appreciation to the influential role of a supervisor and expect it to be difficult and demanding.

Subordinates and other people have an influence on the new role, and one curious example emerged from the interviews; I6 had been experiencing the need to diminish the supervisory role and move towards self-leading subordinates. He wanted to introduce organizational

decision making to the subordinates and did not think that he had to highlight his hierarchically higher position to his subordinated. The aim has not been successful, because his subordinates often remind that they need a leader and they want certain tasks to be performed by their supervisor, not them. I6 felt that his subordinates could take more independent role and he appreciates that kind of leadership, but his subordinates feel differently, which has influenced I6's behavior in his role. As I2 puts it:

"I do believe that other people, colleagues and subordinates have significant influence on developing the work identity."

4.4 Beneficial and disadvantageous factors affecting to the role change

To provide information about the success of role changes, the aim for the interview was to understand beneficial or disadvantageous factors that influence to the role change.

One major theme which the interviewees appreciated the most was seeing an example performance done by other people in that role, usually in the situation that interviewees had been in the subordinate role. Seeing how other people behave in the role made the interviewees aware how they would like to perform in that role, both in good and bad.

For example, I1 describes:

"I have seen and experienced in the counter role how people are acting in that role and I reflected that to the vision of myself in the similar position. In addition, I have seen what to avoid"

Based on the interviews, seeing examples of different roles and how they are played by other people builds the identity of an individual almost imperceptibly. All of the interviewees could name the behavior of their former supervisors to be an influential factor in their assimilation to the new role, because even without stating it out loud, all of the interviewees mentioned someone from past that they had thought they would like to resemble in a similar role or on the contrary, behave very differently. I1 also states that seeing other's succeed or fail is important as one learns that nobody cannot be perfect when it comes to humane work. Related to this, I6 states:

"Role models have a huge impact [to work identity], similarly as biographies you read can also have an influence."

Based on the interviews, seeing how other people in the work react to the ones who represent the supervisory roles help to recognize the boundaries of the roles, what is commonly accepted and appreciated in certain situations and what is not. Playing the counterpart to the supervisory roles widens the view of what individuals respect in a leader. These experiences mold the image of how people see supervisors and leaders and it influences to the perceived expectations that people carry with them when going into new roles.

Role boundaries and perceptions towards different roles were also named to be important. It came clear that there is a certain image how leaders should be; leaders should be pioneers and they are not made to fit in the role as they are expected to create something novel in that position. I4 nicely summarizes:

"I would like to believe that I could succeed in an organization free from hierarchies, such as Supercell, doing the things I'm capable of and it would lead to success. … However, I still feel it is important to have certain given roles, and people who fill the roles accordingly create something that is greater than a sum of the roles. Although it is vital that those roles can be somehow molded to suit the people"

The citation carries the theme of all the interviews; it is important and beneficial to have certain role related boundaries made clear in the organization as it is easier to come to the new role when it is known what is expected, but it is equally important to be able to alter the role to fit individuals. That was named to be the key for people staying in the roles and enjoying them as they can express themselves while being responsible of clear performance. Many of the interviewees indicated that too loose expectations and boundaries bring uncertainty to the role assimilation and make it harder, however there cannot be all things concreted without possibility to change and develop them. For instance, I5 discusses about the fact that she has been in the same organization for so long that she had been developing accurate presumptions, which have been beneficial in the assimilation to the new role. She names clear expectations beneficial for playing the role, but the execution should be free to determine by the individuals. From the career narrative of I4 can be seen that while the role change can be quick and the gap between the roles wide, clear boundaries set by the organization can also work as a beneficial element in the role change.

Another theme that rose from the interviews was the helpfulness of education and training: all the interviews contained discussion about it. For example, many of the interviewees

recognized the situation where a person is placed in a supervisory role without further introduction and then expected to handle things successfully. As I4 states:

"In an ideal situation the person who comes to the role gets to work alongside with the previous person who has been in the role. ... The role cannot be taught entirely by other people, but the previous person can show the sources of information and give examples and tutoring"

In addition, I2 describes that there has been one specific career related training that has affected the way she is now working. However, the training was related to the expert role. She then also mentions the lack of education about leadership and management in the field of her work and speaks about the importance of it. She would appreciate the support in the managerial work coming from both university and workplace. There is not enough managerial training related to human resource work in the universities in her field of studies.

I6 has another opinion: *"You cannot learn leadership at school, it is so comprehensive that you grow into it – personality is the key to success in leadership. Of course, organizational support can help weaker leader to succeed, but it can only do so much. ... You have to have the right person in the right role, educational leadership jargon does not help in that."*

I6 also mentions one interesting aspect in the education and especially organizational training: the feeling that the organization cares. The support from the organization makes a difference in assimilating to new role and succeeding in it. I6 refers to the problem of IT-industry, leaders are not the same kind as programmers and their position might not get that much respect as they might not be experts of the field. He says that he has liked the fact that organization puts effort in the trainings and recognizes that the position requires hard and honest work. Although he does not feel that the trainings are a panacea to better management and leadership skills, the feeling that organization invests in the managers is reinforcing the positive outlook on the role and self-confidence. The same discusses I2 as described above, and also I3 mentions that organizational support can help thriving for different positions and trusting oneself.

Relating to organizational support, being left without support is often recognized based on the sample group in this study. There is discussion about knowing the situation where leadership tasks are just handed to the person and person is expected to deal with the situation. I1 states that he would have liked to have some kind of introduction to the tasks

and his experiences are mainly that he was given the managerial role without further guidance. Adding the pressure from the upper level and also from the colleagues and subordinates, mixing it with own ambitions related to humane work, form a situation where flexible, resilient identity is valuable. In a way, all of the interviews discussed about individuals' own assets, insights, strengths and weaknesses, which can be summarized to I6's phrase:

"It is all about the person and how the identity is developed over the years. Some things can be purposely learnt, but I would say most important is finding the right person to the right role – leadership is not for everyone. Leadership is so holistic that it should be derived from the past experiences and development."

Lastly, family life and external support outside organization was mentioned by I3 in her interview. She introduced an insight of strong relationship and support coming from home that have beneficial influence on the work life and occupational roles.

4.4.1 Highlights and bottlenecks of career path

As from the interview structure can be seen, the question that mapped positive and negative cases during the career was an individual question. However, the purpose of the question was to let the interviewees to tell more in-depth stories from their career to bring value to the interview theme. Not all interviewees were able to identify specific incidents that have had an impact to their current managerial or leadership role. That is only natural, as the question is rather vague and outermost subjective – even though there might be similar incidents between two persons, some individuals can identify it being significant to the work identity and role assimilation and some do not think .

I3 names one positive impacts being the support coming from home. Her husband works in supervisory role as well and was able to offer support and guidance related to the work. He also encouraged her to study more and apply for higher positions. Based on I3's experiences, it can be stated that support from outside of the organization is also very important and empowering.

I6 discussed about two cases during his career that have been affecting his work identity. One of them was negative and related to action that was against I6's values. He did not agree with the operation model of the workplace when it came to solving errors found in their work. Management tried to diminish the errors and explain the client that there was nothing

wrong, whereas I6 was strongly on the side of apologizing and offering immediately to correct the mistake. He felt that the way of handling the errors was old-fashioned and bad for the business in the long run. The organizational culture has changed into better direction since the incidents, but previously these cases caused him to question his role and his engagement to work.

Another case had a positive impact to his identity and role assimilation. Their company was growing and stepping into foreign markets at the time. While being in underdog role, their company took over the markets by being trustworthy and listening the client. Winning in the market while doing the right thing was cheering up the business and making I6 proud of their actions, which shines through the discussion. Being proud of the company and of own work certainly uplifts the mood and creates trust and engagement towards the organization, which is beneficial to the role taking.

From the interviews can be drawn that positive incidents build trust toward the work, but negative incidents can also be valuable, if they are handled right. Being able to work accordingly to own values helps one assimilate to the role. Individual going through hard experiences and surviving them has an impact that strengthens the work identity and increases the feeling of belonging. Solving the hard situations as a team or in a larger picture, as an organization, can make a difference in the role assimilation; dealing with difficulties can weld a person into the role and can work as a learning curve, if properly dealt.

4.5 Determining the success of the expert-to-leader role change

The goal of the last theme in the interview was to understand the success factors of role changes, which is important for understanding the main research question. The interview question covered two areas inside the theme: how success of role change can be determined and what are the factors affecting to the success.

It came apparent from the interviews that the factors determining the success of the role change fall somewhat naturally into two categories: there are internal and external determinants for success in role change. External factors are factors such as productiveness, meeting the goals set for the person who possess the role and fitting into the work community, whereas internal factors are related to internal cohesion, individual happiness and extent of assimilation to the role. For example, I3 determined the role change success

by measuring business efficiency and performance indicators on the other side and well-being at work on the other side. Other interviews resulted similar discussions, as I5 stated:

"... that you can benefit the work community - you have a natural role for yourself, and you can work as a part of the community."

According to I1: *"Success in organizational point of view is as a matter of productivity, in well-being point of view a matter of being stressless and accepting the role and identity. In communal point of view, it is a matter of role partners accepting the role change."*

Interestingly, interviewees did not seem to regard internal and external factors equal. Most of the interviewees named external factors first, some interviewees named straight-forwardly only external factors, and one of the interviewee emphasized internal factors over external. Overall view, however, was that both factors determine whether the role change is successful, and both have significance in measuring the success of the role change.

Main factors that interviewees brought up were related to understanding the goals and purpose of the role and having organizational boundaries. Another major theme was factors related to individual and personality. Both I4 and I6 described the personality and internal resources being vital in the success; I6 declaring that education and trainings can do so much acting in the supervisory role, but the basic elements in the personality are the key, some have them and some not. I4, on the other hand, takes an example of the field of his work; the organization acts in a very fixed way in introducing new positions to staff; there are fairly good processes relating to role changes in the organization, but the system assumes that the field does not change. In reality, it changes significantly between some roles. That is why it matters greatly who is the person changing between the positions, and the success comes firstly from the person. Further, I2 and I3 mentioned how important it is to have, or to form, a thick skin when playing the supervisory role. I2 reflected to her early career and noted that she has been noticing that not everybody wants to have supervisory role, and some are not suitable for it even though they are willing to take the role.

The data of the interviews could be interpreted in a way that it not only highlights the need for certain person in certain role, but the assimilation capability, flexibility and resilience of an individual. Taking the role and owning it by assimilating to it and molding the role within the boundaries may be key to success. Transition from expert role to a leader role means a transition to a role that has a whole new focus points and is evaluated very differently.

As I1 puts it: *"There is a certain presumption that expert should stand in the pedestal, but in the supervisory role one should understand to step down from it. ... When it comes to leadership, one should understand that it is a supporting function [in organization], not the core function."*

I4 continues: *"In leadership positions individual is expected to work as a transformative force and seek for novel ways to do the work."*

Internal success factors that interviewees listed are related to understanding the social construction of the roles and paying attention to the subtle changes in individual's behavior that the role change needs to be successful. I2 mentions recognizing own boundaries, which is a result of conscious thinking if an individual. All internal success factors leads to conscious identity work.

Interviewees mentioned the organization as an enabling factor for success of role change. Inherent goals for role change, the cohesion, the assimilation and such, will not benefit the individual if the organization will not give room for the change. Interviewees mentioned the importance of role boundaries that are elaborated clearly, that also have possibilities for individual to mold the role suitable for them. Elaboration of the expectations are also important according to the interviewees.

5. DISCUSSION AND CONCLUSIONS

In this part of the thesis, the results of the research are presented in the light of literature and important points are discussed further. These views are married with research questions in order to offer insights from literature and the study to deeply comprehend the research questions. The research questions are brought up one by one and the theoretical contributions and implications chapter combines the answers and presents the conclusions.

First, before discussing the main research question, it is important to answer the sub-questions to maintain logical flow and build a foundation for better comprehension of the main interest of this research, the elements of a successful expert-to-leader role change.

5.1 Successful role change

Interviewees defined successful role transitioning through internal and external factors, such as inner cohesion between global identity and the new role, and fulfilling the expectations associated to the role. Discussions with interviewees shed light to the change itself. Experts perform differently in organizations than leaders, and that is important: key to succeed in the role change is to understand the need for behavioral change. Literature conforms the results of the interviews, as success is understood to be reached from the individual's comprehension of the needed behavior and ability to assimilate to the new role in a way that is cohesive not only externally but also internally. For instance, earlier mentioned Hall (2004), Louis (1980) and Eby, Butts and Lockwood (2003) all state the same – whether the discussion is about individuals' self-awareness, metacompetencies or sense-making process, the solution for successful role change is to understand what is demanded from the role, how one should behave and what one is expected to achieve in the role.

It is to be mentioned that success is rather subjective matter and can vary between different roles. Roles, understood as socially constructed, always require counterparts who naturally have expectations about the role. Inner expectations can be mirrored from the external expectations and society, but also from internal desires and own global identity. Two interesting elements come into play especially in the expert-to-leader role change, and they are organizational environment, where the change happens, and social environment, as leader role involves and touches other people more than expert role usually does. These add more content for measuring the success of the role change, compared e.g., role changes outside the organizational environment or role changes that does not change the domain as

much as changing from an expert to a leader. As success is subjective and variant by nature, it is not reasonable to seek for the exact measurement points and the general definition for the success, for it may be considered different depending on the case. However, it is important to understand the stakeholder groups, or general elements, of the change, which are more generalizable and shared between different cases. These groups have been depicted in the figure 13.
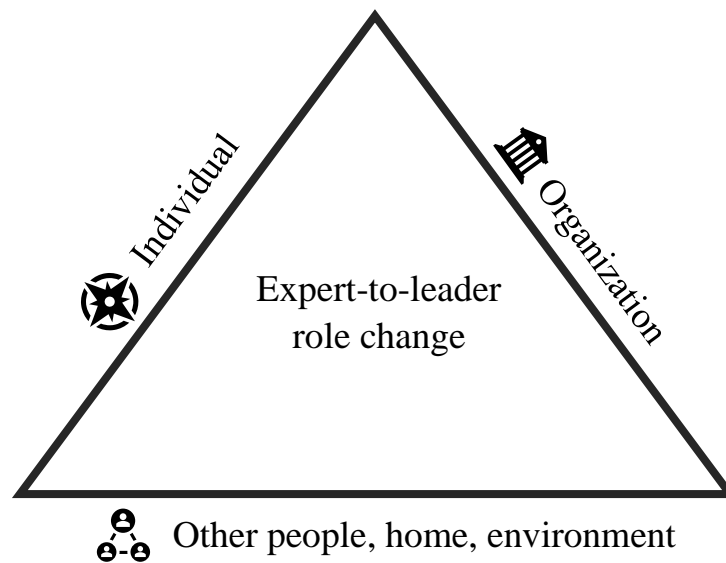

Figure 13: General elements of expert-to-leader change

The figure consists of three sides of triangle, two of which are describing external stakeholders and one describing internal element. The number of external or internal elements mark no inequality between them, the external part is divided into two for clarification. The common elements that are explaining the success of the expert-to-leader change and elements that can be used to assess and measure the success can be placed under these three sides of the triangle.

The three general elements remain in the expert-to-leader change, even though the situations vary tremendously. The most generalizable definition of successful role change can be said to be achieved when the expectations of all stakeholders are met. Earlier mentioned Ibarra and Khapova (2007) have found one of the prospects of successful role change being the familiarity of the work field, same as Louis (1980) analyses the sense-making process being easier for the insiders of the company. This fits nicely to the idea that being able to modify oneself and assimilate to the new role determines how successful the change was. Change is

less painful and faster completed if the field is familiar, as understanding in beforehand the expectations gives a head start compared to those who come outside the organization to the new role. However, the individual is not the only element of a successful role change, which can be seen from the framework of general elements. Other two elements participate in the determination of the successful expert-to-leader role change. All three elements contribute to the main research question and are discussed further later in this thesis.

5.2 Influence of social environment

The purpose of this study was also to focus on few external elements, that are interesting attributors to the topic of changing the role in corporate world, and therefore could possibly offer insights to the main research question. Influence of subordinates and other stakeholders for the change was anticipated to be important, but the importance shone through also differently as predicted. In this discussion also parts of other external elements of the expert-to-leader role change that emerged from the interviews are brought into further discussion.

Earlier mentioned setup of having former colleagues as subordinates after the role change can cause clashes between the counterparts. These social constructions and relationships can make the role transitioning harder by tightening the role boundaries and causing vagueness for the role behavior – at worst, former colleagues not accepting the different behavior that individual is presenting in the new role. This will definitely complicate the transitioning and understanding the role boundaries and behavioral models for a leader to act.

Overall, it was evident from the interviews that subordinates and other people have significant impact to the role change. New aspect found from the interview discussions was the fact that individuals transitioning from expert to leader wanted to succeed in the role change because it was related to other people's wellbeing at work. The element of being responsible of other people's work was significant, as interviewees discussed that they felt the pressure and responsibility to really put thought being equal and promoting good values related to an admirable leader, even though their own underlying global identity was sometimes contrasting. Interestingly, even though some interviewees were sightly pushed to take the supervisory role and they identified as experts, they felt the need for assimilating to the supervisory role, because there was other people who were directly impacted how well the individual would succeed in the new role. This element can be also identified one of the psychological motives which Ashforth (2000) describes in his framework. Ashforth's identity motive is about self-coherence, and relating to it, the interviewees were aiming at

being good leaders, something that would be assumed most of us would do in similar situation. Having fair, equal leaders as role models will create a need for aiming to be a good leader in a supervisory role, otherwise individual's own role behavior would clash with the inherent image of what individual is expecting leadership to be.

Many interviewees discussed the necessity of taking some kind of distance to the former colleagues, especially if they have become close friends in the former role as an expert: interviewees mention words such as controlled behavior and feel of responsibility to act equal. The need for taking distance is little hint of identity change that can be connected to the role transitioning. This can be one of the reasons why some individuals struggle getting in the leader role and experiencing a clash at first with their global identity.

While subordinates and colleagues have significant impact on the role change, another theme related to external elements of the change emerged from the interviews: the influence of other roles and social environments outside the workplace. The discussion disclosing this theme can carried through an example of I3. In the interview, I3 told that she experienced direct and indirect support from her husband to reach for higher positions and new adventures in her working life. Her husband supported her directly by encouraging her to study more, apply for higher positions and working in supervisory role himself, he was able to give advice and discuss with I3 about her role change. Indirectly he supported her by taking care of family life while she studied and worked farer away from home. As stated previously, support is beneficial for the success of role change and from the experience of 13 it can be said that with stable ground it is easier to conduct the change.

The narrative of I3 encloses another element from the theme of external influence outside of organizational life. I3 also has alongside of the supervisory role other roles: at home she is a mother and a wife. Ashforth, Kreiner and Fugate (2000) discuss about micro-role transitioning and role boundaries in this sense, when the change considers simultaneous roles that individual has. Other roles individuals have influence also on the role change process: Ashforth et. al. categorize roles as high segmentation roles with high contrast in role identities and impermeability in role boundaries and low segmentation or high integration roles with low contrast in role identities and low permeability in role boundaries. Roles with high segmentation means greater magnitude in the role change as the roles are distant or very separate from each other, and low segmentation or high integration roles have blurred role boundaries and the change is more subtle. These both can cause hurdles to the role change

process, as the roles outside from the organization influence on the global identity of an individual, but they can also work as reinforcing and supporting strengths. Becoming a parent for a child is a fundamental identity change, which usually awake the parenting skills, i.e. mother or father instinct in an individual. This may be even beneficial in organizational context, as leadership and management skills comprise also dealing with people, perhaps coaching, sometimes nurturing or setting the boundaries. Roles in home and other places outside the organization can be utilized as strengths.

5.3 Influence of the structure of the career path

Two kinds of methods forming a career was observed: path that was formed by "drifting" and very organized and driven path with a clear direction. Whether the choice of making the role change in question came from the individual him/herself or from the organization, the individuals faced similar problems and similar thoughts emerged from the interviews. It came clear that there is always a chance to visit the stage 5 in the identity matrix of Ristikangas et. al (2008), which is a point of clashing roles. Career narratives also gave insights what are experienced important during the role change.

However, examining the six career narratives and descriptions how interviewees got to the point they were at, there was a notable difference in the atmosphere of the interviews that included a chosen career path, influenced by the individuals themselves, compared to the paths that were described to be achieved "by drifting". Interviewees seemed to be braver to assimilate themselves to the new role and respectively adjust the new role to their global identity, if they had more self-composed career. This observation indicates that they may be more likely to focus on the transition, more sensitive to interpret their external environment in respect to their new identity and more eager to develop themselves for the role. It is only logical: unwillingness or uncertainty influencing to the role change can lead growing pain and problems in the change process as the existing expert identity clashes with very different leader role.

Interestingly, the interviewees who had deterministic careers were also offering more insights in the discussion about role models affecting their leadership identity. All the interviewees recognized the importance of the role models, but the discussion was livelier, and the importance of former experiences was more emphasized and detailed by the interviewees, as if they had observed leadership behavior more precisely throughout their career. Past experiences of leadership role behavior and boundaries seem to be more

significant to them than to those who did not describe their career paths as deterministic. Given the fact that all of the interviewees had had rather similar positions during their career regarding that all had experiences of different supervisors, and assuming that all the interviewees put effort reminiscing the influential factors during their career, it could be drawn that there is a difference how individuals value the experiences of the past career. Considering this, although there is no single correct way of building a career that is successful, individuals' attitudes towards the transitioning seems to have influence on the assimilation to the new role. Those who are engaged to succeed in the role change, can draw learning experiences from their past career, although they have not played the supervisory role before.

Another remark examining the career paths was that some interviewees seemed to benefit their former expert role: in certain supervisory roles it was necessary to understand the core business and subordinate's field of work, and the former experts fulfilled the supervisory role well, offering both insights for the work and also were capable of performing leadership tasks. In some supervisory roles the gap between being an expert and being a supervisor was larger, but they also could focus more developing their leadership skills and doing purely leadership tasks in the new role. Although the interviewees had all very different backgrounds and the level of expertise is therefore harder to compare, the interviews interpreted that the best combination benefitting the expert-to-leader role change was a strong expert, having multiple years of expertise in the field and simultaneously wanting to have supervisory role on the side or change to role entirely to a leader role. This way the expertise from the field was enhanced with the willingness to learn to be a supervisor, and in these situations also the experiences from the past career were exploited the most, based on the interviews of this study. These individuals could maybe have a better change avoiding the stage 5 in the identity matrix by Ristikangas et. al. (2008), however, this is not the case in every expert-to-leader role change. For instance, one interviewee in this study described the leader role being added top of the expert role, leading to more difficult time and task management, bouncing between the two roles he had to fulfill simultaneously.

Regardless how deterministic the individual was proceeding towards the expert-to-leader role change, all the interviewees mentioned a need for training, education, support or a combination for all of these. This presents yet again the view of the elements of the role change being dependent on each other. In addition, individuals' personalities and capabilities

vary as external elements vary also. Organizations can balance external element to some extent by offering the support and some education to leadership tasks.

Interesting aspect can be learned from the career path of I4. Military organization is strict and even though 14 described that he has had deterministic take on his career, he has also experienced the lack of a say when it comes to certain positions. Whether the role change was initiated by I4 or the organization, it was clear that strict boundaries in a role can help individual to assimilate to the new role and pick up the expected behavior. In a way, communicating role boundaries and making the behavior in a role transparent, organization can support in the role change.

5.4 Success factors of expert-to-leader role change

Concluding the analysis of interviews and literature, the successful role change can be derived from internal and external factors: an individual stepping into a new role must fulfill both internal and external expectations in order to succeed in the change. These expectations form the foundation for successful role change and, as argued before, success of the change vary from case to case.

5.4.1 The characteristics of an individual

The one element remaining the same despite external expectations is the individual doing the role change. It came very clear from the interviews and is carried through in literature that individual has the most impact in the success of the role change. By assimilating to the role or adjusting to it to avoid clashes between the new role and global identity require cognitive action from the individual in question. The statements in the interviews considered arguments such as having a thick skin, being able to rehearse the new role in beforehand or seeing someone acting in the role being helpful during the role transitioning process. These are related to the discussion in literature; being able to assimilate to the new role, being aware of the role boundaries and using role models to reflect own desires. For example, Hall (2004) argues similarly in his research and discusses about protean orientation as a characteristic of an individual. He argues that, for instance, self-awareness and adaptability affect the flexibility or in other words, being protean, which can be seen to have a part in the success of the role change. This can be recognized also from Goodall's (2012) framework of expert leaders, naming innate capabilities as one of the element of expert leaders.

Already in the 80's, Nigel Nicholson (1984) mentions a term 'personal growth' in his article on work role transitions. In addition, the discussion of individuals' almost virtuous traits benefitting in the role transition is close to literature of organizational citizenship behavior (OCB) (e.g. Podsakoff, Ahearne & MacKenzie 1997 and Carpenter, Berry & Houston 2014). The theory of OCB can be linked to the idea of individual's own influence on the success of the role change – OCB, that is individual's voluntary commitment within organization, positive behavior and proactive approach to organizational situations (ibid.), could influence on the motivation to adapt and deal with the growing pain caused by the new role. Ashforth's framework indicates the same, as he lists behavior such as motivation of identification of own preferences and the role expectations and ability to reach the belonging and control. Ashforth's framework's results could be described as personal growth of an individual. Being able to assimilate to the role can be then considered as organizational citizenship behavior – an individual is willing to tackle the confrontations and difficulties in the role change by developing him/herself to offer him/herself for the organization.

Interviewees described also clashes between the global identity and the new professional identity. For instance, in supervisory position the desire to be equal and lead with patience was contradictory to some of the interviewees personal characteristics. The threat of acting against global identity is higher in a major work role transition such as a change from an expert to a leader. Persons who have the capabilities to assimilate to the new role, understand the differences in behaviors and work towards achieving inner balance, succeed better in the role change. Hence, it can be clearly stated that the agility of an individual is important in the role change.

5.4.2 Education and support

Another element that answers to the research question is one factor that is also named in Goodall's theory of expert leaders: leadership and management skills. It is certain that expert who has good leadership traits, possible experience in managing or has studied the field enough, can function better as a supervisor than expert who does not possess these traits or knowledge. However, we may ask is this element vital for succeeding in the role change. Based on the interviews of this research, the answer is leaning towards "no", because the emphasis should not solely be on the shoulders of the individual. Related to this, two external factors were brought up in the interviews: organizational support and surrounding personnel in the workplace. Based on the interviews, organizational support is highly valued and

wished by the experts taking on supervisory role. Interviews highlighted that organizations need to be aware of the possible difficulties the social or organizational aspects may create. Support, whether it is education and trainings or supervisors understanding the situation, marks good ground for role transitioning to happen. Interviewees described the supervisory tasks difficult in the same sense that makes political decisions hard: sometimes one cannot please all and often one has limitations in resources to fulfill all needs. A desire to be appreciated when working hands tied in a hard position was underlined in many interviews.

Some interviewees experienced organizational leadership and management education important while other interviewees appreciated organizational support higher than trainings and other education. Nevertheless, it can be stated that external organizational elements, especially support in the transitioning process, are important success factors. As stated earlier, organizational activities supporting the individuals going through the role change can balance the differences between the individuals or the external situations, offering methods and easier environment to cope with the turbulence of new role, ensuring the easier success of the role change.

Even if the individuals would not appreciate the leadership education or get knowledge out of it, it is easy to connect the management trainings to the fourth motive in Ashforth's (2000) theory, the belonging. This is brought up in the interviews as a need for support from the organization. Ashforth's motive of belonging indicates a need for being part of a group. Change from expert role to a leader role can be easier, when organization communicates individual's roles and their boundaries by inviting them to "manager group" by arranging trainings for the managers only.

5.4.3 Other people and subordinates

Third theme emerging from the interviews can be also classified as external element, but it ties closer within individuals' inherent characteristics than the organizational elements, such as trainings, education and support. Other people in individual's life and subordinates in the moment of the role change can be said to have an influence on the success of the role change.

Interviews shed light to the role models and their significance to the role change. This is partly related to the individual's favorable characteristics, adaptability and self-awareness, however, the element is also partly external. All of the interviewees reported to recognize at least one good or bad role model, which has affected consciously to their identity as leaders.

Role models can be argued to have important part in the role change process, and they can guide to successful role change if they lead to accurate and expected behavior in the new role. Role models can have even more significant influence on role change that came apparent from these interviews, because individuals can be influenced also unconsciously, which is more difficult to disclose.

Based on the interviews, other people the individual worked with, and the counter roles individual played during the career path seemed to have important influence on the occupational identity in supervisory roles. Roles can be defined as social constructions, and former experience can really strengthen the roles and therefore define the boundaries more clearly. Interestingly, from the interviews it came also clear that those who had worked a long time in the same organization utilized the experience from the social context of their organizations and were able to identify the needed and expected behavior that is inherent to the role and usually not communicated verbally. In the case of I6, he was even able to negotiate the role to suit him and the work, as he had seen few individuals fail in the same role. This conforms the literature, as Goodall (2012) describes organizational knowledge as one important part of the definition of expert leader.

Subordinates have also an influence on the expert-to-leader role change: they play the counter role and can communicate with their behavior or straight forward vocally, similarly as in I6's case, what is expected of the leader. Certainly, support in the new role from subordinates will reinforce self-confidence of an individual in question.

It could be thought that these success factors reinforce each other – understanding the social construction of roles and realizing what is expected with the help of an organization that is supporting and offering clear role boundaries, a flexible person is capable to do the role change without further problems. Having good feedback gives certainty to play the role, mold the role to be coherent with individual's global identity, which increases the internal cohesion.

5.5 Theoretical contributions and implications

Unarguably, there is an academic interest towards modern day career changes. Discussion about rookie managers and the problematic transitioning from one role to another has been raised (Walker 2002). Especially in Finland, the theme has been in a spotlight and the news have addressed issues related to leadership and management emerging in healthcare sector.

This thesis focused to unveil elements related to the expert-to-leader role change and various external and internal factors influencing to the success of this specific role change.

The results of this thesis indicate that organizational support, other external support and inherent features of individual have an influence on the success of a role change. These results are in line with the literature, but they also consider the external elements more precisely. While inherent features of individual are out of organization's reach, the support via trainings and other educative activities, assistance in the first steps, clear communication of the role boundaries and offering role models or coaches to talk to could benefit the individual doing the role change. With the external support of organizations, it could be possible to diminish the differences of individuals' competencies and in this way to steer the role change towards into more successful one.

Essentially, the contribution of this thesis is to evoke organizations to understand the elements that are related to role change of experts becoming managers or supervisors. This specific role change has unique elements that emerge when the role which an individual changes from differs quite a lot from the role an individual is transitioning into. According to the results of this thesis, organization can have a major influence on the success of the role change, even though the fundamental role change is done by the individual and internal elements do matter significantly.

5.6 Limitations and directions for further research

The limitations of this thesis offer possibilities for further research on similar subjects. The sample size regarding this study is rather small, and therefore it could be useful to repeat the study similarly but with a broader sample size. It would improve the generalizability, which this thesis lacks as a qualitative research with a small sample size.

This study shed light to the support needed in the role transitioning. Possible further research could take more concrete approach and study the usefulness of external support activities in the role change process in organization's point of view.

Based on the career narratives of this study and the research of Ashforth, Kreiner and Fugate (2000), further research could be focused also into examining the relationship between the leader role and other roles outside the organization, for example does being a parent influence in a certain way to individual's leadership style. Also, this research touched the theme of family life and its influence on the success of the role change, and the theme could

be carried further in other type of research, for instance considering the expert-to-leader role change and how it is affected by individual's other roles.

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APPENDICES

Appendix 1: Interview structure

Theme interview, to be recorded. Questions are open and more precise questions are used only if more precise themes are not emerging from free discussion.

Background questions:

- Age

- Current position at work

Interview questions:

1. Career narrative. Describe the career path that had led to the position you are currently.

- Education?
- Current position?
- Different phases during the career?
- At what point do you feel you reached expert position?
- At what point do you feel you were given leadership or managerial position?
- How much do you feel you have had an impact on your career path?
- What initiated the expert-to-leader role change?

2. Describe the role changes throughout your career.

- What has initiated the changes?
- What elements you recognize to have an impact on the changes?
- Have you noted any behavioral changes?
- Have you noted any changes between the expert role and leader role? How are they different?

3. Bottlenecks and highlights during the career.

- Why did you name these things to have negative/positive impact on your career?
- How have these things influenced to your work role?
- Have you faced any moments where you have questioned your capabilities as an expert / as a leader?
- Any moments where you have had to behave differently than you would have behaved in your normal life (outside of occupation)?

4. Things that have influenced positively/negatively on the expert-to-leader role change and more specially to the assimilation or acceptance of the new role.

- Role models? Have they had any impact on the role assimilation?
- Did you have a change to practice the new role (participate to meetings, seeing others play the role)
- Do you have any education or trainings related to the leadership tasks? What, when and have they had any influence on you?
- Social environment (inside and outside organization), the meaning of it to the role assimilation?
- Did you have any presumptions of the role? Have you played the counterpart of your current position?
- Do you like your current role? What role you would like to be in? Does your current role fit to your personal identity? Do you separate your occupational identity and personal identity?
- How free you feel you can behave in the role? How would you describe you play the role? Have you noticed any role boundaries, if yes, were they easy to find, how did you like them?

5. The impact of colleagues and subordinates during the role change.

- Change in their behavior?
- Change in your behavior?
- How important you see external, social elements for the career transitioning?

6. Successful role change

- How would you say expert-to-leader role change is successful?
- How would you measure the success of role change?