

Developing a Scalable Consultancy Model for IPSAA

(Independent Professional Security Advisory Agency)

A Critical Evaluation of Work-Based Research Methodologies

Assessment Component 1

Module: Work-Based Research

Module Code: BMPF7330D

Program: Professional Practice Framework

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Word Count: 3117

Submission Date: 07/08/2026

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1. Introduction

IPSAA (Independent Professional Security Advisory Agency) is a specialist security advisory and training consultancy based in Nairobi, Kenya and established in 2017. It serves diplomatic, humanitarian, commercial and security-sector clients. The founder's experience, judgement, reputation and training credibility are its central business strengths. However, these same strengths create a work-based problem. If knowledge, client relationships and quality decisions remain centered on one person, IPSAA may find it difficult to grow without reducing consistency or trust. The work-based challenge is to decide how the founder's expertise can support growth while quality, trust and professional credibility are protected.

The proposed research title is Developing a Scalable Consultancy Model for IPSAA: A Critical Evaluation of Work-Based Research Methodologies. The main question is: which research approach would provide the strongest evidence for developing a scalable IPSAA business model that uses the founder's expertise strategically while maintaining quality, trust and professional credibility?

Scalability can take two forms. Founder-independent scalability involves documenting, standardizing or delegating activities so that they can eventually be delivered by approved associates or through repeatable systems. Founder-led scalability uses the founder's specialist knowledge, reputation and personality to reach more people through services such as mentorship, executive briefings, guest talks or group masterclasses. These options diversify the business but still depend on the founder's direct contribution.

The proposed research aims to determine which IPSAA activities should remain founder-led, which could be standardized or delegated and which new founder-led services could increase reach and income. It asks how clients and learners understand quality and value, what demand may exist for diversified services and which combination of research methods would provide credible evidence for future growth.

This report critically evaluates the methodological approaches, research designs and data-collection methods most suitable for IPSAA's work setting. Its central argument is that a pragmatic mixed-methods action research case study offers the strongest design because the scalability problem requires both measurable evidence and a context-sensitive understanding of professional practice. The discussion therefore focuses on the alignment between philosophy, methodology, research design and methods before examining ethics and the implications of the founder's position as an insider researcher.

2. Main Findings

2.1 Philosophical Foundations and Methodological Alignment

A research paradigm is the broad set of assumptions that guides how a study understands reality and produces knowledge. Ontology concerns what is assumed about the nature of reality while epistemology concerns how that reality can be known and what should count as credible evidence (Saunders, Lewis and Thornhill, 2023; Creswell and Creswell, 2023). For this study, the ontological question is whether organizational realities such as quality, trust and scalability exist as objectively measurable features or whether they are partly constructed through the experiences and interpretations of clients, learners and instructors. Methodological alignment means ensuring that these assumptions about reality and knowledge are consistent with the research approach, design, methods and interpretation of findings.

Positivism assumes that important features of reality can be observed and measured objectively using systematic procedures intended to reduce the influence of the researcher (Saunders, Lewis and Thornhill, 2023; Bell, Bryman and Harley, 2022). For IPSAA, relevant measures could include assessment scores, attendance, learner ratings, enquiries and repeat-client activity. These indicators can reveal patterns but they are insufficient on their own because a course may receive high satisfaction scores without necessarily improving judgement, confidence or operational readiness.

Interpretivism focuses on how people understand their experiences and the social settings in which those experiences occur (Bryman, 2016; Neuman, 2014). This is relevant to IPSAA because trust, instructor credibility and perceptions of security risk are shaped through interaction. A client may value a course because the instructor understands the client's environment, rather than only because the content is technically correct. However, interpretive evidence is context-dependent and is not primarily designed to produce standardized comparisons across groups; used alone, it would therefore make cohort comparison and longitudinal judgements about consistency more difficult (Bell, Bryman and Harley, 2022; Creswell and Creswell, 2023).

Pragmatism is therefore the best philosophical position for this study. It allows methods to be chosen because they answer the practical problem rather than follow one fixed view of knowledge (Creswell and Creswell, 2023; Creswell and Plano Clark, 2018). IPSAA's scalability challenge includes measurable issues such as feedback, repeat business and demand for possible new services through diversification. It also includes trust, credibility, professional judgement and the value clients attach to the founder. Therefore, both forms of evidence are needed.

This philosophical choice leads directly to a clear methodology link. Pragmatism supports mixed methods because IPSAA needs numerical evidence and an explanation of what that evidence means in practice. An action research case study is suitable because the purpose is to improve the organization, not simply describe it. Surveys, interviews, focus groups, document analysis and reflective observation can each answer a different part of the problem. The research question acts as the connecting thread for the mixed-methods approach ensuring they are integral to the study rather than less significant additions.

2.2 Methodological Approaches

A quantitative approach would help IPSAA collect comparable evidence across training cohorts. Data could include pre-course and post-course confidence ratings, assessment results, attendance, satisfaction, enquiries and repeat-client activity (Kothari, 2004; Bryman and Bell, 2015). Standardized measures can identify patterns and indicate whether delivery is becoming more consistent. Nevertheless, numerical results should not be treated as neutral or self-explanatory. Survey responses can be affected by question design, response bias and social desirability particularly where participants wish to protect an existing relationship with the founder-researcher (Bryman, 2016; Bell, Bryman and Harley, 2022). Quantitative findings should therefore be interpreted cautiously and triangulated with qualitative and documentary evidence.

A qualitative approach would provide deeper insight into how clients, learners and instructors understand IPSAA's value (Liamputtong, 2010). Interviews and focus groups could explore tacit knowledge, scenario realism, barriers to growth and the connection between trust and competence. This matters because security training depends on judgement and context and not only on course outputs. However, qualitative research takes time, is harder to compare and may be influenced by the researcher's own position. This is especially relevant if the founder is also the researcher. Qualitative methods should therefore be used to explain and challenge the quantitative numerical findings rather than replace them.

A mixed methods approach is the strongest option for this study because it deals with the limitations and weaknesses of using only one method. Surveys could show whether learner confidence improves while interviews could explore whether that confidence is meaningful in practice. Document analysis could show whether knowledge has been standardized while observation could reveal whether delivery still depends on the founder's personal expertise. However, mixed methods only add value when the findings are brought together correctly rather than presented as separate sets of numbers and comments (Denzin and Lincoln, 2018; Flick, 2022).

For IPSAA, integration should happen through triangulation. If learner ratings improve but interviews suggest that scenarios do not feel realistic enough, that conflict should be treated as an important finding. If assessment results are strong but clients still worry about instructor consistency, then IPSAA should now question whether the assessment is measuring the right capabilities. The strongest approach is therefore not simply a mixed method but an integrated mixed method focused on the central scalability question.

2.3 Research Design Options

According to Punch (2013), each broad methodological approach can be implemented through several possible research designs. A survey-led design would allow IPSAA to compare learner satisfaction, confidence, service interest and perceived relevance efficiently across cohorts. However, it would be too limited as the principal design because it would not explain why clients value particular services or which activities require the founder's involvement. A survey should therefore form one component of the study rather than constitute the entire design.

An experimental design could, in theory, test whether a new training intervention improves outcomes. Its strength is control. Its weakness is that IPSAA's work does not happen in neat laboratory conditions. Security consultancy is live, varied and client specific. Randomization, control groups and fully standardized conditions may be unrealistic or even unsuitable. An experimental design could oversimplify the setting and produce findings that are technically tidy but not very useful.

A case study fits well because IPSAA is a specific organization with a defined work-based problem (Yin, 2018). It would allow the researcher to examine founder dependency, training systems, client relationships, quality assurance and both forms of scalability in context. The findings, while not universally applicable, could offer useful insights for similar founder-led businesses.

Action research is also highly relevant because the aim is not only to understand IPSAA's challenge but to improve practice through cycles of diagnosis, planning, action, evaluation and reflection (Lewin, 1946; Coghlan and Brannick, 2014). Its main risk is that the researcher may become too invested in proving that the changes worked. A more traditional case study may offer greater distance while a survey design may offer easier comparison. However, neither would support learning and improvement in the organization as strongly as action research.

No single design addresses the problem fully. A mixed-methods action research case study is the strongest option because it combines organizational perspective, measurable data and practical change. It can show what is changing, explain why it is changing and allow IPSAA to refine its approach. Its credibility will depend on safeguards such as triangulation, anonymous feedback, reflective journaling and external professional challenges.

Table 1: Evaluation of research design options for IPSAA

Design Option	Value for IPSAA	Limitation	Judgement
Survey-led	Comparable cohort evidence	Limited explanation and possible social desirability bias	Useful but insufficient alone
Experimental	Potential causal testing	Impractical in live consultancy settings	Not suitable as primary design
Case study	Strong organizational context	Limited statistical generalizability	Strong fit
Action research	Supports practical improvement cycles	Insider bias and role conflict	Strong if safeguarded
Mixed-methods action research case study	Combines measurement, context and change	Complex to manage and integrate	Preferred design

2.4 Preferred Research Design

The preferred design is a pragmatic mixed-methods action research case study. This design fits IPSAA because the scalability challenge is practical, complex and rooted in professional work. It can examine founder-independent growth through documented systems and possible future delegation while also testing founder-led growth through mentorship, guest talks, executive briefings or similar services. Diversification remains a practical issue that the proposed research methods can investigate.

The case study element keeps the research grounded in IPSAA's real operating environment. The action research element allows IPSAA to test improvements such as revised course documentation, instructor development processes, quality assurance checklists and feedback systems. The mixed-methods element ensures that any changes are judged through both measurable indicators and stakeholder experience.

This design also recognizes the limits of the available evidence. IPSAA may not have large datasets, stable comparison groups or complete historical records. Instead, it should use several complementary sources, explain how judgements were reached and highlight that the findings are analytically transferable to similar settings but not statistically generalized to all consultancies.

2.5 Research Methods and Practical Implementation

The **quantitative** part should use anonymous surveys with learners and selected clients. Questions should measure confidence, relevance, instructor effectiveness, realistic scenarios and usefulness at work. They could also measure interest in mentorship, guest talks, executive briefings or group masterclasses. Comparing scores before and after training would show perceived improvement (Kirkpatrick and Kirkpatrick, 2006). Response patterns and changes between courses would help IPSAA identify strengths, problems and possible demand. Questions should first be tested with a small group.

The **qualitative** part should use semi-structured interviews with clients, instructors and learners selected for their direct experience of IPSAA; this is purposive sampling ([Patton, 2015](#)). Interviews could explore which services require the founder's personal involvement, which could be standardized, and why clients might value mentorship or guest speaking. Surveys would provide a broad picture while interviews would explain the reasons behind the responses. The findings would help IPSAA but would not represent the entire sector.

Focus groups could enable learners or instructors to discuss scenario realism, course improvements and the application of learning at work. Interaction can be valuable because participants may extend, qualify or challenge one another's views ([Liamputtong, 2010](#)). However, group dynamics can also allow dominant participants to shape the discussion, while confidentiality concerns or workplace relationships may discourage others from speaking openly ([Liamputtong, 2010](#); [Bryman, 2016](#)). Focus groups should therefore complement rather than replace private interviews and anonymous feedback.

Document analysis should examine course materials, operating procedures, instructor guidance, client proposals and quality-assurance records. Documentary evidence can corroborate interview and observation findings and show whether organizational knowledge is recorded consistently and can be transferred or repeated ([Yin, 2018](#); [Saunders, Lewis and Thornhill, 2023](#)). For IPSAA, this would help identify activities that are already repeatable, those that still rely on the founder's tacit judgement, and knowledge that could support services such as mentorship, briefings or masterclasses.

Reflective observation would examine training delivery in practice, including instructor decisions, learner participation and adaptations made for different scenarios. Observation can reveal a difference between documented procedures and actual practice but the presence of the researcher may also influence behaviour ([Bell, Bryman and Harley, 2022](#)). The purpose of observation should therefore be explained in advance, observations should be recorded through a consistent template and records should be used to improve systems rather than to criticize individual instructors.

Numerical and qualitative findings should be integrated rather than reported separately. Survey results can identify patterns and changes over time while interview and focus-group data can be analyzed through familiarization, coding, theme development and review ([Braun and Clarke, 2021](#)). Themes such as trust, founder-led value, repeatable delivery and interest in diversified services should be compared with survey, documentary and observational evidence. Mixed-methods credibility depends on examining convergence, complementarity and contradiction across sources ([Creswell and Plano Clark, 2018](#); [Denzin and Lincoln, 2018](#)). Consistent procedures, reflexive analysis and an audit trail would strengthen dependability ([Silverman, 2016](#)). Enquiries alone do not demonstrate service quality or sustained demand without supporting feedback, conversion and booking data.

Diversification should be investigated rather than assumed to be a solution. Surveys could measure client interest, preferred formats, pricing expectations and repeat-business potential while interviews could explore why clients value the founder's involvement, which expertise is difficult to transfer and which new services they would trust IPSAA to provide. Through action research, IPSAA could pilot a mentorship program or executive briefing, collect feedback, revise the offer and retest it (Coghlan and Brannick, 2014). The case-study framework would keep testing grounded in IPSAA's market position and professional reputation (Yin, 2018), while financial and operational records could compare each option's reach, income potential and founder-time requirements.

2.6 Ethics and Insider Research

An insider researcher conducts research within an organization or professional setting of which they are already a member providing direct access to its people, practices, relationships and organizational knowledge (Coghlan and Brannick, 2014). Here, the researcher is both IPSAA's founder and the sole investigator of its scalability. This positionality offers detailed contextual understanding, trusted access to clients, learners and instructors and insight into tacit knowledge, professional judgement and operational realities that may not be visible to an external researcher. However, the founder's personal, professional and financial investment may influence the questions asked, evidence prioritized and findings interpreted particularly where results challenge established practices, founder-led decisions or the proposed business model. Familiarity may also cause assumptions to be treated as facts, contradictory evidence to be overlooked or favorable findings to receive greater weight. Participants may provide socially desirable responses, withhold criticism or feel obliged to participate because of the researcher's authority and existing relationships with IPSAA.

These risks are heightened because no second researcher is available to challenge decisions or interpretations. Insider influence should therefore be made transparent, critically examined and carefully managed. Safeguards should include voluntary participation, informed consent, the right to withdraw without consequence, anonymity or confidentiality, secure data handling and clear separation between research participation and training, assessment, employment or commercial relationships. A reflexive journal and decision-making audit trail should document assumptions, role conflicts and changes in interpretation, as outlined in Appendix B.

Research transparency should be demonstrated through a clear audit trail with selected examples included in Appendix B. These records include a positionality statement, reflexive journal extracts, coding and theme-development records and a decision log showing how alternative explanations and conflicting evidence were considered. They help distinguish evidence-based conclusions from prior assumptions and reduce confirmation bias.

Triangulation across interviews, surveys, observations and documentary evidence should be used to test the consistency of findings while negative or contradictory cases should be actively sought rather than excluded. Independent academic supervision, external peer review, anonymous data collection and participant checking should provide further challenge to founder-centered interpretations. Collectively, these safeguards would not eliminate the researcher's positional influence, but they would make it visible, accountable and open to scrutiny allowing the benefits of deep insider knowledge to be retained while reducing the risks of confirmation bias, power imbalance, selective interpretation and conflicts of interest.

Before collecting data, IPSAA should prepare a participant information sheet, consent form, privacy notice and withdrawal procedure. Survey responses should be anonymous where possible and interview data should be pseudonymized before analysis. Data should be stored securely, access should be restricted, retention periods should be stated, and records should be deleted when no longer required. Because IPSAA works in security-related environments, client identities, operational details and sensitive examples should be removed or generalized. The collection and processing of personal data must comply with Kenya's Data Protection Act 2019 ([Republic of Kenya, 2019](#)), while ethical review should continue throughout the project rather than being treated as a one-time approval exercise ([British Educational Research Association, 2024](#)).

3. Conclusion

This report has critically evaluated the research philosophies, methodologies, designs and methods available for investigating IPSAA's potential for sustainable growth. The central purpose was to identify the research approach that would provide the strongest evidence for developing a scalable IPSAA business model that uses the founder's expertise strategically while maintaining service quality, client trust and professional credibility.

Taken together, this evaluation establishes that an integrated, pragmatic mixed-methods action research case study is the most credible and useful route to the study's goal of developing a scalable IPSAA consultancy model. Grounded in pragmatism, it combines quantitative evidence of demand, performance and repeatability with qualitative insight into trust, stakeholder experience and the distinctive value of the founder's expertise. Its action-research cycles ensure that findings are not merely descriptive but are used to test, refine and embed workable changes. This approach will enable IPSAA to make evidence-based decisions about what must remain founder-led, what can be standardized or delegated and which services can be expanded without compromising quality, credibility or client confidence. In short, scalability will be treated not as growth at any cost, but as responsible, measurable and sustainable growth.

4. Recommendations

- IPSAA should adopt a pragmatic mixed-methods action research case study. The study should examine founder-led and founder-independent scalability, stakeholder views of quality, possible demand for diversified services and the evidence needed to support responsible growth.
- The quantitative element should include anonymous learner surveys, pre-course and post-course confidence measures, course completion data, satisfaction ratings and selected business indicators such as repeat-client activity and qualified enquiries. The qualitative element should include semi-structured interviews, selective focus groups, document analysis and reflective observation. These methods should be integrated through triangulation rather than reported separately.
- Before data collection begins, IPSAA should develop an ethics pack containing participant information, consent, withdrawal and secure data-storage arrangements. Reflexive notes and academic review should reduce insider bias. The final scalability framework should identify activities that must remain founder-led, processes that can be standardized or delegated and diversified services that justify further testing through evidence rather than assumption.

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6. Appendices

Appendix A: Proposed Research and Ethics Implementation Plan

This implementation plan translates the recommended pragmatic mixed-methods design into practical research activity for IPSAA.

Method	Participants or evidence	Purpose	Main safeguard
Anonymous survey	Learners in selected cohorts	Compare confidence, relevance and consistency	Voluntary participation and anonymous responses
Semi-structured interviews	Clients, instructors and selected learners	Explore trust, value and founder dependency	Consent, pseudonyms and secure transcripts
Document analysis	Course materials, procedures and quality records	Assess whether knowledge is documented and repeatable	Remove client and operational identifiers
Reflective observation	Selected training delivery	Examine instructor decisions and adaptation in practice	Clear notification and a reflexive audit trail
Triangulation review	Survey, interview, observation and document findings	Identify agreement, contradiction and practical implications	External professional challenge and transparent decisions

Appendix B: Research Transparency and Audit-Trail Documentation

This appendix outlines the documentation that will be maintained to support transparency, reflexivity and accountability throughout the research. Together, these records will create an audit trail showing how evidence was collected, analyzed and interpreted, how the researcher's insider position was considered, and how alternative or contradictory evidence was used to reduce the risk of confirmation bias.

Document or record	Purpose	Information to be documented	Evidence included in the appendix
Researcher positionality statement	Makes the researcher's insider role and possible influence on the study clear.	The researcher's role as the founder of IPSAA, existing relationships, professional interests, prior assumptions and possible conflicts of interest.	A brief positionality statement explaining how the researcher's position may influence data collection and interpretation.
Reflexive journal	Encourages the researcher to reflect critically throughout the study.	Assumptions, reactions, role conflicts, unexpected findings and changes in the researcher's understanding or interpretation.	Selected and anonymized extracts showing how reflexivity informed the research process.
Research decision log	Provides a clear record of important research decisions.	Changes to research questions, participant selection, data-collection methods, coding decisions and reasons for methodological changes.	A summary table listing key decisions, the reasons for them and their effect on the study.
Secondary literature and evidence log	Shows how existing research and external evidence were used to examine the researcher's assumptions.	Relevant academic literature, industry evidence, areas of agreement or disagreement, and their influence on the interpretation of findings.	Selected examples demonstrating how conclusions were compared with existing knowledge rather than based only on the researcher's experience.
Coding and theme-development record	Demonstrates how qualitative findings were developed from the collected data.	Initial codes, changes to codes, emerging themes, supporting evidence and reasons for combining or rejecting themes.	An example showing the development of codes into final themes.
Triangulation matrix	Tests whether conclusions are supported by more than one source of evidence.	Comparison of findings from interviews, surveys, observations, organizational documents and relevant secondary evidence.	A summary matrix showing areas of convergence, complementarity and contradiction between the evidence sources.
Contradictory and negative evidence log	Reduces the risk of confirmation bias and selective reporting.	Findings that question the researcher's expectations, challenge favorable interpretations or suggest alternative explanations.	An anonymized summary of contradictory evidence and an explanation of how it was considered in the final analysis.
Participant checking record	Helps confirm that participants' views have been represented fairly.	Participant comments on interview summaries, preliminary themes or the researcher's interpretation of their experiences.	A summary of the checking process and any changes made following participant feedback.
Academic supervision or peer-review record	Provides independent challenge to the insider researcher's decisions and interpretations.	Feedback from the academic supervisor or external reviewer and the researcher's response to that feedback.	A brief record of the main issues raised and how they were addressed.