

# Mapping the Transitional Experience of Switching Leadership Roles

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### Purpose

It is proposed that executives need to be prepared to switch roles and membership of groups in order to fulfil their leadership responsibilities effectively.

### Design / Methodology / Approach

A validated framework provides insight into the leadership roles that executives can switch between as they move from one formal, informal or temporary group to the next within the organisation's wider senior management team. The methodology adopted is qualitative, focusing on inquiry-based learning which enabled the authors to gather data on those aspects of context that relate specifically to the leadership roles executives switch between.

### Findings

Changing role is found to facilitate improvement in each executive's decision-making effectiveness, and over time, in the decision-making capability of an organisation's wider senior management team.

### Research Limitations / Implications

A one-organisation intensive case study of a multinational engineering company engaged in the design, development and manufacture of rotating turbomachinery provides the platform for the research. The concepts advanced will require validating in other organisations of both similar and different demographic profiles.

### Practical Implications

The concepts advanced, and implications discussed, provide an insight into the nature of leadership as a network of relationships. The practical steps individual executives can take to develop their ability to adopt different leadership roles are highlighted.

### Originality / Value

This article attempts to assist executives within the wider senior management team to better adapt and coordinate their behaviour with other executives. In so doing, it is suggested that executives contribute more positively to the organisational decision-making processes and wider senior management team interaction by being adaptive and responsive to changes in their surrounding context.

## **Introduction.**

Organisations are made up of differences and contrasts (Kakabadse & Kakabadse, 1999: 147). What one person feels is valuable and should be preserved, someone else may wish to change. Over time some may change their point of view, while others rigidly stick to their ideas. However, in order to live and work together, bridges need to be built between people who hold differences of perspective.

The allocation and switching of roles has become accepted as a mechanism for building bridges between individuals and so facilitating the effective contribution of an individual within the work place to a team (Belbin, 1981; Belbin, 1993; Furnham et al, 1993; Dulewicz, 1995; Parkinson, 1995; Broucek & Randall, 1996; Fischer et al, 1996; Senior, 1998; Partington & Harris, 1999). Indeed it has long been argued (Parsons, 1951) that the relationship between an individual and their situation may be characterised in terms of role. Parsons (1951) defines role in terms of a “normative consensus” that sets limits on acceptable behavioural patterns for individuals occupying a specific role, recognising the positive effect that appropriately distributed roles can have on the process and acknowledging differences. This article examines how switching roles within an organisation’s wider senior management team facilitated each executive’s contribution to the organisational decision-making process and as a consequence senior management team task accomplishment.

Leadership research may be broadly characterised by the continued development and testing of generalisable theoretical frameworks to explain the effects of pre-existing executive and senior management team characteristics on an organisation’s performance (Gupta & Govindarajan, 1984; Eisenhardt & Schoonhoven, 1990; Miller, 1991; Wiersema & Bantel, 1992). Some researchers focus on the use of historical documentation when establishing a link between characteristics and performance (Finkelstein & Hambrick, 1990; Hambrick et al, 1996) while others have used quasi-

experimental methods to link characteristics and performance (Boon et al, 1998; Carpenter & Golden, 1997). Few studies have considered organisational outcomes in terms of psychological influences; however Miller et al (1982) and Boon & De Bradander (1996) have considered executive's locus of control and Kets de Vries & Miller (1984) have contemplated executive's neuroses.

A further branch of leadership research has been that of identifying relationships between the characteristics of executives and the effectiveness of the organisation, while at the same time being criticised (Boal & Hooijberg, 2001; Cannella & Monroe, 1997) for its positivist form. Positivism assumes that the researcher is a sort of "spectator" of the object of enquiry (Chia, 2002; 7). Reality is assumed to unproblematically exist "out there" independent of the perceptions, beliefs and biases of the researcher. For positivists, sound research consists of the "undistorted" recording of observations obtained through efficiency-driven methods of investigation and the use of precise terminologies and classification in the process of documentation (Kakabadse & Kakabadse, 2005). Explanations regarding the observed pattern of regularities connecting one set of phenomena with another can then be systematically developed and empirically verified.

The research described in this article addresses the question of the extent to which a role based perspective on leadership can provide a basis for senior management team task accomplishment. The approach adopted focuses on individuals' interpretations of their environment and of their own and other's behaviour, and in so doing helps to explain how characteristics of executives are related. To address this question the authors adopted an action research approach (Lewin, 1946; Eden & Huxham, 1996), in contrast to a positivist approach. Action research (Bryman, 1989: 135) falls into the family of research methodologies broadly referred to as inquiry-based learning (Kakabadse & Kakabadse, 2005). Action research focuses on individual's

interpretations of their environment and of their own and others' behaviour, and in so doing helps to explain how characteristics of executives are related.

In this article the authors first examine the literature on leadership that supports a role-based perspective. A methodology section that explains and justifies the data-gathering strategy follows. The framework that emerges from the gathered data is then described. The framework highlights practical steps individual executives can take to develop their ability to adopt different roles. Changing roles was found to facilitate improvement in each executive's decision-making effectiveness, and over time the decision-making effectiveness of the wider senior management team. The article concludes with a consideration of the implications for both leadership theory and the practising executive.

### **A Role Based Perspective of Leadership.**

There have been as many as sixty-five different systems developed to define the dimensions of leadership (Fleishman et al, 1991). In his comprehensive review of leadership theory and practice Northouse (2004) observed that despite the multiple ways leadership has been conceptualised two components can be identified as central to the phenomena of leadership:

- Leadership is a process. It is not a linear, one-way event but rather an interactive event.
- Leadership occurs in groups. Groups provide the context in which leadership takes place.

Northouse's (2004) perspective on leadership facilitates the sharing of leadership challenges and responsibilities. The tasks of leadership are not restricted only to the formally designated leader in a group.

When considering how individuals interact within groups, Surowiecki (2004: 86) observed that independent decision making within groups was pointless, as what one individual is willing to do depends on what that individual thinks others in the group are going to do, and vice versa. According to Surowiecki (2004) dependency exists within a group when group members are capable of action independently of other group members. As other group members are capable of action over which each individual group member has no control, the individual group members must consider the implications of other's response when contemplating what action to take themselves. Perhaps paradoxically it is the independence of individual group members that results in dependency within the group. Surowiecki (2004) goes on to say that as a result of the dependency between members of a group, there is no guarantee the group will emerge with good solutions to those problems it faces. What Surowiecki (2004) discovered, however, was that despite the issue of dependency, groups do make what he terms "smart" decisions far more often than could be explained by random chance. The conclusion Surowiecki (2004) reached was that within those groups that made smart decisions, individuals were coordinating their behaviour with other group members, even if they were not consciously aware of the fact they were doing so. In all Surowiecki (2004) identified three challenges if the group was to make smart decisions:

- Cooperation. The challenge of inducing self-interested distrustful people to work together, even when narrow self-interest would seem to dictate that no individual should take part.
- Coordination. Members of a group must figure out how to coordinate their behaviour, knowing that everyone else is trying to do the same.
- Cognition. Collectively solving problems that have or will have definite solutions to which there may not be a single right answer, but to which some answers are certainly better than others.

The issue of cooperation may be considered to be the problem of gathering together those who can contribute to resolving a specific organisational issue. Attempting to gather group

members with appropriate skills in turn leads to a problem of coordination, ensuring that a particular group does indeed contain all those who have knowledge and experience relevant to the issue at hand. If all the relevant individuals are successfully brought together, the problem becomes one of cognition, as data is gathered, analysed, shared and feedback is received within the social system the group has become.

Parsons (1951) emphasises that all actions available to an individual within a social system are a function of the relationship between the individual and their situation. He characterises the relationship between an individual and his or her situation in terms of role, which is described as the primary point of direct articulation between personality of the individual and the structure of the social system. Theoreticians and practitioners, therefore, view roles as the basic elements of a social system; Belbin (1993: 31) defined roles in the broad sense as clusters of behaviours. Belbin's (1993) observations suggest that by recognising the roles of others and by becoming aware of the range of roles that are available to one self, people learn to modify their behaviour to take account of the situation. When specifically considering leadership Belbin (2000: 17) observed:

“The quintessential feature of a small well-balanced team is that leadership is shared and rotates. As critical issues arise, different individuals come to the fore and make their special contribution.”

The theoretical roots of role making were reviewed by Seers et al (2003: 82) who observed that over decades of research the basic process of role differentiation has been documented. With respect to leadership, Bass's (1949) analysis noted that two individual group members often emerged into complementary roles. One of these leaders was generally the member most respected for his contributions to the accomplishment of tasks within the group. The other was generally the best-liked member, who was most respected for his contribution and support of friendly interaction

amongst members. Similar results were reported by Carter (1954), Slater (1955), Borgatta & Bales (1956), Bales & Slater (1955) and Bales (1958).

The above early studies are focused on role differentiation, however it is important to note that not all of these studies consistently showed the same emergence of two high-status leadership roles and resulting follower roles for the remaining group members. Bales & Slater (1955) found that member roles were also differentiated by member activity, with Slater (1955) observing that the degree of group consensus in the identification of the status hierarchy was related to the pattern of role differentiation. The strongest consensus was generally achieved when the two most active individuals emerged into the task specialist and relationship specialist roles. Consensus was lowest when the most active member did not score highly in either task or relationship dimensions, indicating that group level conflict reduced when active group members emerged into a distinct leadership role.

Griffin (2002) studied the roles of leaders, and argues that there is complexity in the interdependency of people in a large organisation in the moment of the living present, and that the focus of attention must be on everyday interactions between people in their local situation. Griffin (2002) concludes that it is through this interaction that roles emerge, including the roles of leaders. The perspective of Griffin (2002) is again helpful when considering how to characterise the roles of leaders. He argues that the roles of leaders must be considered in terms of the everyday interaction between individuals in their local situations. Characterising the roles of leaders must therefore be undertaken utilising a research method that considers the actions of individual executives in their local situations.



In terms of discrete roles, Sheard & Kakabadse (2002a) developed a perspective on leadership using an ethnographic methodology whereby the roles of leaders were defined in terms of four distinct categories *legitimate*, *social*, *task* and *macro*. Sheard & Kakabadse (2002a) concluded that it was necessary to subdivide the subject leadership if those in leadership positions were to be provided with a deeper insight into the impact of their own behaviour.

The *legitimate* leader was defined by Sheard & Kakabadse (2002a) as the publicly appointed leader of the team who is accountable for delivery of the team's objectives. The *social* leader was defined as the individual who undertakes to build a network of relationships with other team members. Sheard & Kakabadse (2002a) regarded *task* leaders as deriving their legitimacy to lead other team members from the formal allocation of responsibility for delivering a specific task by the team's *legitimate* leader. The *macro* leadership role was defined as the leadership role played by a senior executive when interacting with the team. The senior executive brings a "macro" view of the organisation to the team, and whilst Sheard & Kakabadse (2002a) observed that although the time the organisation's senior executives spent interacting with any one team was relatively small, the impact this had on the team was found to be great. Sheard & Kakabadse (2002a) concluded that it was entirely possible for every individual within a group to occupy one of the four leadership roles. Further, the ability of executives to adopt complementary leadership roles to other group members was closely correlated to their own effectiveness as a leader.

### **Methodology.**

In the inquiry that is the subject of this article, the authors studied the extent to which a role-based perspective on leadership can provide insight into a senior management team's formal mechanism for task accomplishment. To examine this issue the authors selected a number of executives who were used for the basis of the inquiry. These were drawn from the wider senior

management team of a single organisation, with inquiry focused on executive's interpretations of their environment and of their own and other's behaviour.

Action research (Bryman, 1989: 135) focuses on individual's interpretations of their environment and of their own and others behaviour. The term "action research" refers to a form of qualitative research which, broadly, results from an involvement by the researcher with members of an organisation over a matter that is of genuine concern to them and in which there is an intent by the organisation's members to take action based on the intervention. Qualitative research tends to emphasise individual's interpretations of their environment and of their own and other's behaviour. Sensitivity to what people say and to the context in which their actions take place is a primary consideration of action research. When characterising action research Kakabadse & Kakabadse (2005) defined its primary purpose to be facilitating change at individual and organisational levels. In this context improvement is achieved through at-the-moment awareness of how actions and emotions are affecting decision-making effectiveness.

Classical action research starts from the idea that if you want to change something effectively you need to understand it (French & Bell, 1978; Hodman, 1979). Easterly-Smith et al (2002) consider that the following two features are normally part of any action research project:

- A belief that the best way of learning about an organisation or social system is through attempting to change it, and this should to some extent be the objective of the action research.
- A belief that those people most likely to be affected by, or involved in implementing these changes should as far as possible become involved in the research process itself.

Whilst characterising action research Eden & Huxham (2002) observed that theory elaboration and development is an explicit concern of the research process. New theory is expressed

through the design of tools, techniques, models and frameworks. Eden & Huxham (2002) contend that the basis for tool, technique, model or framework design must be explicit and shown to be related to the theories that comprise the researcher's "pre-understanding". It is accepted that the researcher brings a preconception, a starting theoretical position to the inquiry (Gummeson, 1991). Awareness of preconceptions is an important consideration towards the latter stages of the project. It is therefore important to move towards reflecting on the role of pre-understanding only as theories begin to emerge. Deferring reflection in this way may be regarded as a middle way between the positions taken by Glaser (1992) who argues for complete suppression of pre-understanding and Alderfer (1993) who favours a hypothesis-testing approach to action research.

As the nature of each action research intervention is determined by its immediate context, action research does not lend itself to replication of empirical data. However action research based organisational interventions do provide an opportunity to test complex theoretical frameworks. Theory develops from a synthesis of that which emerges from data and that which emerges from the use in practice of theory influenced by the researcher's pre-understanding. As such Eden & Huxham (2002) contend that it is unusual for action research to deliver fundamentally new theories, but that the theories tested influence the actions of all those engaged in the inquiry. Sutton & Shaw (1995) described theory thus:

"Theory is about connections among phenomena, a story about why acts, events, structure and thoughts occur."

The process of testing theories influences actions of those engaged in the inquiry by illuminating how acts and events are related. By implication, therefore "emergent" theory draws attention away from those aspects of the situation that are not included in the theory. Emergent theory is instrumental in helping those participating in action research to understand cause and effect

within their specific context. A key strength of action research is that its basis in action means that causality is established as a consequence of what people do in circumstances that really matter to them, as opposed to what they say they would do in hypothetical situations.

The action research process may be considered as an interweaving of the consulting process with the research process. The Consulting involves providing a solution to the specific issues that prompted the intervention (Eden & Huxham, 2002: 261). In this article, design of a post-merger organisational structure was the principal author's consultancy contribution following merger of three organisations. The research process is the process of drawing out theory during the intervention. The label "action research" is appropriate only when the emerging theory informs the action taken during the consulting process.

### **Study.**

One of the main concerns following the merger was establishment of an integrated post-merger organisational structure. The three organisations each employed approximately 1,400 staff, giving the combined organisation a total of 4,200 employees. Each organisation had its own production centres plus global network of sales offices and distributors. The senior management team of the newly merged organisation estimated that a harmonised and integrated organisation could offer the same range of products and services with a 20% reduction in staff. In this context the senior management team is defined as the organisation's Chief Executive Officer (CEO) and those who report to the CEO directly. To deliver the reduction, however, integration was required of the original organisations into an entirely new structure.

During design of the post merger organisational structure the authors had observed that some executives were actively involved in the decision making process, whilst some seemed unable to contribute at all. Executives within the organisation had their own explanations as to why this was

the case. Typically the CEO would offer examples of executives ‘outstanding personal qualities’ as the ‘reason’ why they were so influential during the decision making process, with little evidence to support the assertion. The authors formed the view that first and foremost it was necessary to take into account the explanations of the executives involved, whilst also remaining objective enough to take into account the context within which the decision making process was taking place. To this end it was necessary to get close to and actually work with the executives involved as decisions regarding design of the new organisational structure were made and implemented.

The authors negotiated access to the organisation over an eighteen-month period, working with the senior management team in a variety of contexts: board meetings, staff meetings with middle managers, coffee breaks and casual conversations. Daily field notes were taken and unstructured interviews conducted throughout the project. Towards the end of the project semi-structured interviews were carried out with the executives that comprised the senior management team plus approximately 20% of the executives who comprised the wider senior management team. In this context the wider senior management team is defined as the one hundred most senior executives within the organisation who were each year invited by the CEO to attend the organisation’s annual management conference.

The first six months of the project were characterised by observation and unstructured interview. The authors recognised that the senior management team spent less than three days a month attending meetings as a single large group. The remainder of executives’ time was spent working in informal groups with their peers, or more formally with those who reported to them. The majority of the time executives did spend together was spent in discussion regarding a different issue each time they met. The issues typically discussed related to the operational consequence of strategic decisions, for example the strategic decision to have only one legal entity in each of the 31

countries within which the post merger organisation operated. When this decision was announced, those executives affected recognised the likelihood of their becoming part of the 20% reduction in staff associated with the post merger harmonisation and integration. Each found different ways to bring to the senior management team's attention those consequences that would follow closure or merger of the entity for which they were responsible.

The approach most commonly adopted by executives was to seek guidance from the senior management team as to which legal entity in a particular country should respond to an unusually large request for quotation from an important client. Generally the executive making the request would be running one of two legal entities in a country, be the likely choice for closure, and simultaneously alone possess the necessary capability to convert the request for quotation into an order. A second strategy adopted by executives who felt their organisation was under threat of closure was to seek approval to hire staff or purchase capital equipment, to enable completion of orders already taken. Such requests exposed the truth that whilst a decision to have one legal entity per country had been taken, and was ultimately fully implemented, the operational consequences of the decision were not thought through at the time it was announced. As a result executives within the senior management team found themselves spending time in both formal and informal meetings, making tactical decisions about how the new structure would function. As soon as a decision was made regarding the issue that had prompted a meeting, executives would immediately scatter to take phone calls, check emails and generally address other urgent problems.

When the authors reviewed their field notes, they observed that some executives spent up to 50% of their time in informal small groups with peers and subordinates discussing operational consequences and issues associated with the strategic move to a single legal entity per country, whilst others spent no more than 5% of their time voluntarily contributing to informal small group

debate. When the senior management team as a large group discussed the issues executives had been intensively discussing in small groups, the authors realised that a collective senior management team decision was made quickly.

The authors also observed that a decision made after intensive small group discussion was more likely to be implemented, in contrast to decisions made relating to issues raised by executives who had not debated them before hand with small groups of their peers and subordinates. Due to the tight time scales associated with responding to client requests for quotation, for example, it was relatively easy for executives in the wider senior management team to make ‘mistakes’ if a decision went against them. These mistakes were something that happened more regularly when an issue was associated with a member of the senior management team who choose not to debate it informally with peers and subordinates prior to a large group senior management team meeting. The authors speculated that the way in which executives were working in small groups facilitated more effective senior management team decision-making.

The authors spent the second six months of the project involved in discussions with executives on a daily basis. The authors focused specifically on those issues executives were addressing in small groups with other executives. Approximately one hundred of these discussions were considered significant enough to record. Each of these discussions was regarded as a separate and distinct data set. Each data set contained approximately fifteen “batches” of data that collectively summarised significant aspects of the discussion.

Twelve months into the project, the data within each data set was reviewed. The data itself was regarded as "evidence" that was collected together into groups that related to a similar theme. The authors then generated an “emerging truth” in the style of Lewin (1946), summarising the theme

they considered the data supported. In this context the authors consider that an emerging truth is verifiable from experience or observation, with the collected data comprising evidence of the authors experience and observations. When considering how best to design an action research program, Eden & Huxham (2002: 262) observed that the exact nature of reflection is relatively immaterial. Two specific characteristics of good quality action research are, however, defined:

- For good quality action research a high degree of systematic method and orderliness is required in reflecting about, and holding on to, the research data and the emergent theoretical outcomes of each episode or cycle of involvement in the organisation.
- For action research, the process of exploring the data, rather than collecting the data – in the detecting of emergent theories and development of existing theories, must be replicable or, at least, capable of being explained by others.

The process of capturing significant conversations as batches of data and then collating data into groups relating to a similar theme is the process of complying with the first of Eden & Huxham's (2002) requirements. The formal recording of each group of data and the emerging truth the authors considered it to support is the process adopted for complying with the second.

In total 92 separate “emerging truths” were generated in this way, supported by 1,357 distinct batches of data. When the authors reviewed the emerging truths, it became apparent they related to similar themes. The decision was made to repeat the process used to generate emerging truths, aggregating emerging truths together into groups relating to a similar theme. A single “hypothesis” was then generated by the authors, which they considered the collected emerging truths supported. In this context the authors defined a hypothesis as “a suggested explanation for a group of emerging truths, accepted as a basis for further verification”. Eight of these hypotheses emerged, which the authors recognised could each be associated with one of the “key factors” proposed by Sheard & Kakabadse (2002b).



Sheard & Kakabadse (2002b) proposed that the transformation of a group into an effective team could be regarded as the process of developing a supportive group social structure, with each individual adapting his behaviour to optimise his personal contribution to the group. Sheard & Kakabadse (2002b) argued that the contribution of an individual to a group could be conceptualised in terms of key factors. The data gathered during the current study related to the contribution of individuals to the groups of which they were a part. Key factors were originally developed from a consideration of the contribution of an individual to a group. The authors concluded that the approach to data gathering during the current study was self-consistent with the intent that informed development of the key factors, and it was therefore valid to associate emerging hypotheses with key factors.

Sheard & Kakabadse (2002b) considered the contribution of an individual to a group in terms of leadership and eight key factors:

- (1) *Clearly Defined Goals*
- (2) *Priorities*
- (3) *Roles & Responsibilities*
- (4) *Self Awareness*
- (5) *Group Dynamics*
- (6) *Communication*
- (7) *Context*
- (8) *Infrastructure*

The key factor's conceptual foundations are rooted within the work of Adair (1986). It has been postulated by Adair (1986) that 'groups' at the most generic level share certain common needs, and those needs can be categorised into three basic elements; task, group and individual. Adair (1986: 121) concludes that a leader's core responsibility is to simultaneously achieve the task, build and maintain the group and develop the individual. Sheard & Kakabadse (2002b) developed the

work of Adair (1986), concluding that when contemplating leadership a lower level of granularity was required. In this context granularity is defined as the level of detail into which a subject is subdivided. Using the basic elements of Adair (1986) as their starting point, Sheard & Kakabadse (2002b) went on to expand and subdivide the basic elements into key factors.

The key factors were discussed and debated by the authors with executives from whom data had originally been gathered. The objective of these discussions was to verify that the executives involved could indeed contemplate their action as being associated with one of the key factors. To facilitate the discussion the authors and executives involved used the work of Sheard & Kakabadse (2002b) to develop and agree a definition for each of the key factors, Table One. The authors realised with mounting excitement that executives could conceptualise different actions as being within the scope of different key factors.

### **Take in Table One.**

In parallel to the above data classification exercise, the authors reviewed data sets, and considered the role played by the executive who had been interviewed. The authors recognised that by considering the leadership an executive was providing in terms of discrete role, they could assign the executive one of Sheard & Kakabadse's (2002a) four leadership roles *macro*, *legitimate*, *social* or *task*. The four-category model of Sheard & Kakabadse (2002a) was selected as it was developed in a context within which the groups being studied were faced with finding solutions to problems for which there was no single correct answer. A feature of the problems executives were addressing in the current study was, also, that there was no single correct answer. The authors therefore concluded that there was similarity between the context within which the four-category leadership model had been developed, and into which it was now being applied.

A second factor influencing the choice of leadership model was that the more traditional role based models of leadership, Bass (1949) for example, whilst identifying two individuals as emerging into high status leadership roles, still characterised remaining group members as adopting follower roles. During small group discussion with the executives participating in the current study it became clear that whilst some occasionally considered themselves to be 'first amongst equals' as a consequence of having a particular skill relevant to a specific issue, none regarded themselves as followers. As such other models of leadership seemed less appropriate to the current study, and therefore were not adopted during the data classification exercise.

The data classification exercise became significant in two ways. First, it was instrumental in highlighting that the evidence collectively could be considered in terms of key factors. Secondly, each data set of evidence could simultaneously be used to associate the executive involved with a leadership role. The insight that the data could be both viewed in terms of key factors and leadership roles led the authors to conclude that leadership roles could be described in terms of key factors.

As the idea that leadership roles could be considered in terms of key factors emerged, additional data sets were collected from executives previously not involved. The intent was to verify that the leadership roles could be considered in terms of key factors when data was gathered from a wider group of executives. Introducing executives to leadership roles and describing them in terms of key factors continued the theory development during the last six months of the project. In small groups executives discussed the features, focus and attendant key factors of each leadership role, and the leadership roles each had occupied in different situations. This prompted a lively debate as to which key factors were most relevant to each leadership role.

**Results.**

The executives involved recognised that their ability to contribute positively towards the decision making process within a small group was enhanced by associating themselves and others with a leadership role. The association of different key factors with each leadership role helped executives to focus on the key factors most relevant, given the leadership role they were occupying. This in turn helped executives make a positive contribution to the group of which they were a part, reducing overlap with the roles of other group members and in doing so reducing group level conflict. A key issue the executives faced, however, was their constant movement between those groups in which they worked. The executives each had busy schedules, with formal meetings, telephone conferences as well as unplanned urgent issues that required their immediate involvement. When informal meetings were included, the executives recognised that they moved between groups up to twenty five times a day. Executives realised that they habitually continued to behave in a new group as they had in the last. This insight helped to explain why movement from some groups to others were successful, but the majority were not. When an executive moves between groups, and the leadership role required did not change, the new group usually performed well. When, on reflection, an executive considered why a move to a new group was unsuccessful, it could usually be associated with a failure to switch leadership roles to that most appropriate to the new group.

The dynamic nature of the change from one leadership role to another was recognised by the executives participating in the project. During small group discussions the concept of “transitional factors” was developed. Transitional factors are separate and distinct from the concept of leadership roles. Leadership roles are defined in terms of the significance of key factors; transitional factors, by contrast, are defined by the changing relative significance of key factors as an executive switches from one leadership role to another. The two combine, as a new leadership role may be regarded as the old leadership role, plus the transitional factor that transforms one into the other. Defining the switch from one leadership role to another in terms of the changing relative importance of key

factors was found to help executives focus on the transitional experience of switching leadership roles.

With four separate leadership roles, it is possible to switch from any one of the four to any of the remaining three leadership roles. As such each leadership role has three transitional factors associated with switching to the remaining three leadership roles. With four leadership roles and three transitional factors per leadership role, this indicates that a total of twelve transitional factors may be defined to “transform” any of the four leadership roles into any of the remaining three leadership roles. Once membership of a new group is established, the transitional factor effectively ceases to exist, as the previous leadership role has now been “transformed” into a new, different, leadership role. What now exists is the new leadership role.

### **Leadership Roles – A Framework.**

The authors recognised that in order to characterise the twelve transitional factors, it was necessary to establish the changing relative importance of the key factors associated with each transitional factor. Before the changing relative importance of key factors could be established, however, the authors recognised that it was first necessary to actually establish the importance of key factors when associated with each of the leadership roles. The authors conceptualised the eight key factors and four leadership roles as an eight by four matrix comprising thirty-two "links". This matrix was named the "leadership role model", Figure One, as it comprised an executive's mental map of those key factors that are important to each leadership role.

### **Take in Figure One.**

Whilst all thirty-two links are theoretically relevant, it was recognised that in practice some would be relatively more important than others. The data classification exercise demonstrates this,

Table Two, with for example the link between the key factor *communication* and the leadership role *social* having 110 batches of data associated with it, whilst the link between the key factor *infrastructure* and the leadership role *task* being associated with only six batches of data. From this the authors concluded that the key factor *communication* was very significant to the leadership role *social*, whilst the key factor *infrastructure* was of little relevance to the leadership role *task*.

### **Take in Table Two.**

The data in Table Two has been presented on the leadership role model graphically. The case for graphical representation was made by Huff & Jenkins (2002) who conclude that graphical modelling naturally lends itself to developing conceptualisations that are both complete and systematic. The data for each link was divided into four categories:

- Category One: 0-30 batches of data assigned to the link.
- Category Two: 31-60 batches of data assigned to the link.
- Category Three: 61-90 batches of data assigned to the link.
- Category Four: 91-120 batches of data assigned to the link.

This model's thirty-two "links" each have "height" that is proportional to the link's significance, Figure Two. A Category Four link, for example, is taller than a Category One, Two or Three link. The concept is simple; you are more likely to stumble over taller objects!

### **Take in Figure Two.**

The most striking feature of the model is that there are major features associated with each leadership role, and with each key factor. The leadership roles have all been demonstrated to be

significant in that they all had data assigned to them in at least one key factor, Table Three. The level of granularity associated with the leadership roles is also considered to have been shown to be appropriate. Of the four leadership roles defined, none was found to be significant to every key factor, and all were significant to at least one key factor.

### **Take In Table Three.**

#### **Dynamically Characterising Transitional Factors**

The dynamic nature of transitional factors can be illustrated by considering the switch from the *macro* to the *legitimate* leadership role. The leadership role model characterises the key factor *group dynamics*, for example, as being a category one link when associated with the *macro*, and category four link when associated with the *legitimate* leadership role. The difference between the two, when switching away from *macro* to *legitimate* leadership roles, is a positive increase in significance of three from a category one to a category four link. A consideration of the difference between the significance of the eight key factors when switching from the *macro* to *legitimate* leadership role enables these differences to be tabulated, Table Four, to help make immediately apparent the nature of the dynamic change occurring as a consequence of the switch. When the “*macro to legitimate*” transitional factor is viewed in this tabular form (the “difference” column in Table Four), it is clear that the key factor *group dynamics* has increased in significance most, and the key factors *infrastructure* and *clearly defined goals* have reduced in significance the most.

### **Take in Table Four.**

The decrease in significance of the key factor *clearly defined goals* can result in executives focusing primarily on defining the new group’s goals. A focus on defining goals, when it is the role of other group members, will result in new group members perceiving behaviour to be inappropriate.

The switch sees the key factor *group dynamics* increasing most, indicating that a conscious effort to separate the process of group life from the content of group discussion is necessary. The leadership role model may be interpreted in a similar way for all twelve transitional factors (Sheard & Kakabadse, 2005). What remains constant throughout the interpretation process is that:

- The complex nature of the network of formal, informal and temporary groups that make up an organisation's wider senior management team can result in an individual executive switching leadership roles many times in a single day.
- An awareness that as an executive moves from one group to another, the behaviour that was appropriate is no longer necessarily so.
- A failure to adapt behaviour to that appropriate in a new group can provoke conflict resulting in an increasing probability of very inappropriate behaviour.

### **Implications For Managers.**

The twelve transitional factors are each associated with a different switch, with different key factors increasing (Table Five) and decreasing (Table Six) in relative importance. Presenting transitional factors in this way (Table Five & Six) was found to help executives understand how to adapt to their new leadership role as they moved from one group to another. Firstly, it was found by executives to be relatively easy to associate individuals within a group with one of the four leadership roles. Secondly, it was relatively easy for executives to follow their own switch from one leadership role to another. A focus on the appropriate transitional factor enabled executives to see the changing relative importance of two or three key factors that enabled one leadership role to be transformed into another. By mapping the transitional experience of switching leadership roles in this way, those involved found the process of switching role became much easier. Defining the transitional experience of switching leadership roles in terms of transitional factors in turn resulted



in executives actually starting to switch roles in practice, as opposed to just talking about switching roles.

### **Take In Table Five & Six.**

As the executives involved became familiar with the process of switching leadership roles, three practical lessons concerning role transition were identified:

- The process of switching leadership roles starts with consciously analysing the members of a new group, associating existing group members with a leadership role and then choosing a complementary leadership role to adopt.
- Switching role is facilitated by an awareness of the transitional factor associated with the transition from an old to new leadership role.
- The changing importance of two or three key factors associated with a transitional factor provides an executive with specific guidance of how their focus should change in order for their contribution to a new group to be perceived as positive by existing group members.

Taken together, it is the focus on leadership roles and transitional factors that constitute the process by which an executive adapts behaviour to that most appropriate, given the leadership roles other executives occupy in a new situation. An awareness of the transitional factor which will convert a previous leadership role to a new one is the sensitivity to context required of executives as they move between formal, informal and temporary groups within an organisation's wider senior management team.

### **Concluding Comments.**

The concept of transitional factors, transforming one leadership role into another, acknowledges the degree to which the formal mechanism for task accomplishment is intertwined with a senior management team's internal role system. The process of familiarising executives with leadership roles available to them, and the transitional factors that enable them to switch roles constitutes a form of role analysis. Role analysis is an intervention strategy, enabling individual executives to take action to solve those problems with which they, and the wider senior management team of which they are a part, are faced.

The existence of informal and temporary small groups of executives within the wider senior management team and larger formal group that is the senior management team presents executives with a challenge. The authors observed that those executives who were able to develop their ability to apply transitional factors, and in so doing adapt from one leadership role to another as they switched groups made a more positive contribution to both the speed and quality of organisational decision making. The challenge for executives is to consider their behaviour in terms of role, specifically the leadership role appropriate to their current situation and therefore by implication the change in behaviour needed if this leadership role is different to that appropriate in their previous situation.

The concepts advanced in this article provide an insight into the nature of leadership as a network of relationships. By recognising the roles of others and by becoming aware of the range of roles that are available to the self, executives learn to modify their behaviour to take account of the situation. This clarification of role boundaries helps to define the limits of authority and responsibility amongst executives and facilitates resolution of internal group issues.

The role theory developed in this article builds on the concept that roles are the basic element of a social system, specifically developing a role based perspective on leadership. The authors propose that by considering leadership in terms of role, individual executives are able to adapt more effectively as their situation changes, and so better coordinate their behaviour with other executives. This in turn enables executives to contribute positively to the organisational decision-making process and wider senior management team interaction by being adaptive and responsive to change in their surrounding context, resulting in decisions both being made more quickly and more likely to be implemented.

The need for further research into the nature of the four leadership roles is clear. The concepts advanced in this article, and the implications discussed provide an insight into the distributed form of leadership, but does not comprise a distributed model of leadership. A study of the practical application of leadership roles is required to identify specifically how they are related, and more generally how they are applied in practice. A limitation of the current study is its basis in a one-organisation intensive case study. To test their robustness, the concepts advanced require validating in organisations with significantly different cultures from that in which they were developed. It is hoped that the observations and emerging theoretical framework offered in this article will stimulate debate and enthusiasm for more research.

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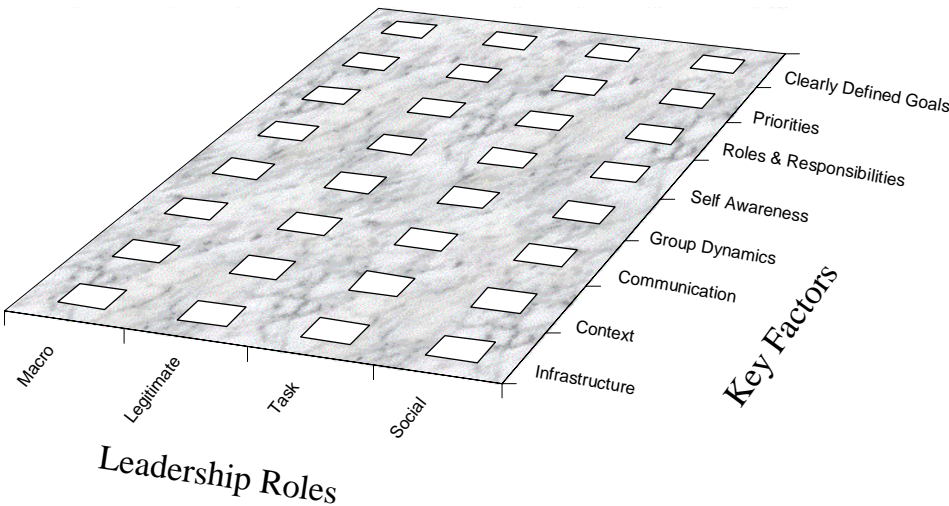


Figure 1: Proposed Leadership Role Model.

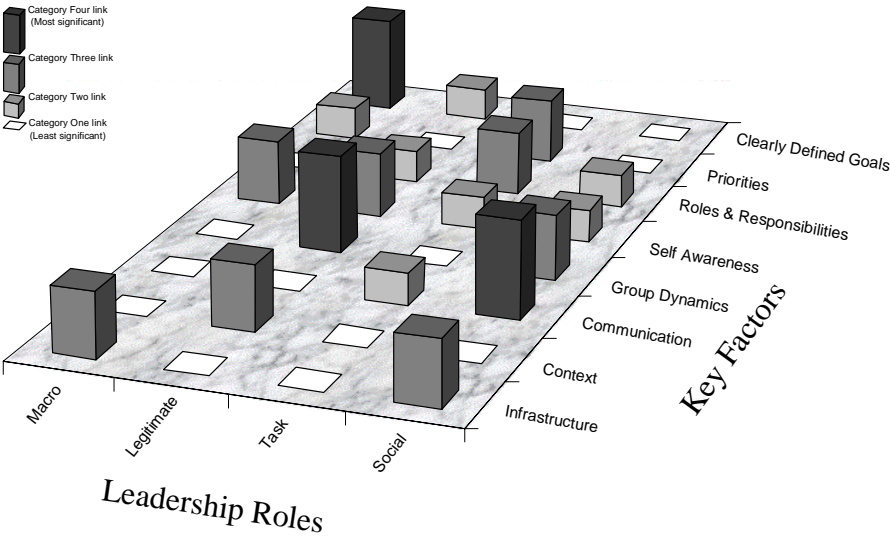


Figure 2: Leadership Role Model.

<b>Key Factors</b>	<b>Definitions</b>
<b>Clearly Defined Goals</b>	It is considered essential that the task be articulated to the group in terms of clearly defined goals. The alternative would be a prescriptive or tactical approach, in which the activities the group was to undertake were specified. The process of defining a group's goal is a strategic process, in which that which the group is to achieve is clearly defined, but the process by which it is achieved is left to the group.
<b>Priorities</b>	Within any organisation there are a wide range of options, many of which would be advantageous if pursued. In practice, due to the practical limitations of time, money and available resources an organisation must choose a small number of options from those available, make them the organisational priority and pursue only those. A very common failing of organisations is attempting to undertake too many projects, with the consequence that all are under-resourced. The concept of priority is therefore central to an organisation's ability to define those options that will maximise its competitive advantage, and then allocate resources to deliver them.
<b>Roles &amp; Responsibilities</b>	From the perspective of the group each individual group member must have complementary roles and responsibilities covering all that are relevant to delivering the group's goal. Significant overlap between roles will result in conflict emerging between group members. This is particularly true with regard to the group leader. It must be clearly understood by all who the group leader is if conflict is not to escalate out of control. Significant extension of roles beyond that strictly necessary to deliver the group's primary goal will result in group members spending time on activities that are not relevant to the group's primary purpose. In so doing the ability of the group to perform is reduced.
<b>Self Awareness</b>	Self-Awareness bundles together all of the psychology associated with the impact of individuals' behaviour on their immediate surroundings. Within this context it is considered important to recognise that the behaviour, both conscious and unconscious, of individuals, can have a profound impact on other group members, which in turn can either positively or negatively impact on a group's performance.
<b>Group Dynamics</b>	It is recognised that a group is more than simply a collection of individuals working towards a common goal; it is also a social system. The concept of "Dual Task" put forward by James (1999) requires that social structures are built within the group to generate the necessary social system the group needs to function. Certainly on the day group members first meet there is no social system. Once performing, effective groups are clearly well ordered, supportive social systems in which each member has a place, which he is comfortable with. The transformation of a loose group to an effective team may then be viewed as the generation, and acceptance, of a new social system.
<b>Communication</b>	The regular flow of information about the job, the task and how the group is undertaking it. Too much information would defeat the purpose, becoming noise and a burden. Too little information and it is ignored, being replaced by speculation. The effective communication between individuals, up and down the organisational hierarchy, is a key factor in mobilising a group around the organisational problem it is intended to address.
<b>Context</b>	Organisational culture was studied by Goffee and Jones (1996) who concluded that significant differences in culture did exist within organisations both horizontally in different parts of the organisation and vertically at different levels within it. From a single group's micro perspective it was considered probable that at some points within the group development process the generic environmental context would impact on its ability to transform from a loose group to an effective team.
<b>Infrastructure</b>	The key factor Infrastructure includes all macro organisation issues from IT systems and Human Resource support to the ability of the senior management team to translate its strategy into a series of goals suitable for a series of teams to tackle. It is recognised that this is a very broad category, however executives recognised that after the skill and competence of employees, the most important factor impacting on organisational performance was adequacy of the organisational infrastructure.

**Table 1:** Definitions of key factors, adapted from Sheard & Kakabadse (2002b).

		Leadership Roles				
		<i>Macro</i>	<i>Legitimate</i>	<i>Task</i>	<i>Social</i>	<b>Total</b>
<b>Key Factors</b>	<b><i>Clearly Defined Goals</i></b>	103	43	16	14	<b>176</b>
	<b><i>Priorities</i></b>	43	15	68	16	<b>142</b>
	<b><i>Roles &amp; Responsibilities</i></b>	14	40	74	39	<b>167</b>
	<b><i>Self Awareness</i></b>	69	64	33	38	<b>204</b>
	<b><i>Group Dynamics</i></b>	15	95	14	72	<b>196</b>
	<b><i>Communication</i></b>	14	14	40	110	<b>178</b>
	<b><i>Context</i></b>	12	74	15	15	<b>116</b>
	<b><i>Infrastructure</i></b>	72	15	6	85	<b>178</b>
	<b>Total</b>					<b>1,357</b>

**Table 2:** Data assigned to each leadership role associated with each key factor.



		Leadership Roles	Sample Data
Key Factors	Clearly Defined Goals	In total one hundred and seventy six pieces of data were associated with the first key factor, <i>clearly defined goals</i> , with <i>macro</i> emerging as the most significant leadership role. Typical data associated with the <i>macro</i> leadership role was:	<p>“Brainstorming mapped out key sub-goals, but the activity needed to reach the first sub-goal was still unclear.”</p> <p>“The goals were clearly enough defined to make it possible to define the tasks needed to achieve them.”</p> <p>“The goal was set, and the team members broke the goal into tasks. At this point it became clear that not enough people were in the team to do the job in the timescales.”</p>
	Priorities	One hundred and forty two batches of data were associated with the second key factor <i>priorities</i> , with <i>task</i> emerging as the most significant leadership role. Typical data associated with the <i>task</i> leadership role was:	<p>“The working solution would not have been delivered by the old system; this team-based structure focused people on a specific goal and a specific deliverable.”</p> <p>“If priorities are not clearly thought through the entire organisation, the team is doomed to fail if the downstream need is simply not there.”</p>
	Roles & Responsibilities	One hundred and sixty seven batches of data were associated with the third key factor <i>roles &amp; responsibilities</i> , with <i>task</i> again emerging as most significant. Typical data associated with the <i>task</i> leadership role was:	<p>“After the team had met it became clear that there was overlap between team members’ perceived roles.”</p> <p>“Some formality to define roles could help reduce conflict, should it occur.”</p> <p>“I was identified as having appropriate skills to take on some of the tasks required to deliver the team’s goal.”</p>
	Self Awareness	Two hundred and four batches of data were associated with the fourth key factor <i>self-awareness</i> , with <i>macro</i> and <i>legitimate</i> leadership roles emerging as the most significant. Typical data associated with the <i>macro</i> leadership role was:	<p>“Lack of self awareness on the part of senior management made changes to priorities far more de-motivating then necessary.”</p> <p>“The mentor aspect of being a team leader, and setting an example by my own behaviour made it possible for me to request specific behaviour from team members.”</p>
	Group Dynamics	One hundred and ninety six batches of data were associated with the fifth key factor <i>group dynamics</i> , with <i>legitimate</i> emerging as the most significant leadership role. Typical data associated with the <i>legitimate</i> leadership role was:	<p>“The key team member’s behaviour was unhelpful, it did not stop the team performing but it certainly did not help.”</p> <p>“If the team comprises people who know each other and are doing something they know how to do, the team can “perform” almost immediately.”</p> <p>“After throwing the ‘inflexible’ part time team member out, the team became a much closer unit.”</p>
	Communication	One hundred and seventy eight batches of data were associated with the sixth key factor <i>communication</i> , with <i>social</i> emerging as the most significant leadership role. Typical data associated with the <i>social</i> leadership role was:	<p>“The key to focusing individuals who are having to give up preferred ways of working is more and better listening.”</p> <p>“Communication only really works face to face at every stage, but particularly during the early stages of the team.”</p>
	Context	One hundred and sixteen batches of data were associated with the seventh key factor <i>context</i> , with <i>legitimate</i> emerging as the most significant leadership role. Typical data associated with the <i>legitimate</i> leadership role was:	<p>“The team had a very broad role; it had to deal with a very ambiguous situation. The goal was clear but the route to that goal was flexible.”</p> <p>“If you aren’t “busy” or “drowning” you are seen as lazy, even though these situations prevent you being proactive.”</p> <p>“The project was too long; it went on for eighteen months. The project should have been split into two phases, with two separate teams working on each.”</p>
	Infrastructure	One hundred and seventy eight batches of data were associated with the eighth key factor <i>infrastructure</i> , with <i>macro</i> and <i>social</i> leadership roles emerging as the most significant. Typical data associated with the <i>social</i> leadership role was:	<p>“The team was never “officially” demobilised. The team was working well, but due to the organisational infrastructure it failed.”</p> <p>“The behaviour of line management is often 180 degrees opposed to the desired direction of senior management.”</p>

**Table 3:** Typical data for each key factor, sample data for the most significant leadership role.

Key Factors	Leadership Roles		
	<i>Macro</i>	<i>Legitimate</i>	<i>Difference</i>
<i>Clearly Defined Goals</i>	4	2	<b>-2</b>
<i>Priorities</i>	2	1	<b>-1</b>
<i>Roles &amp; Responsibilities</i>	1	2	<b>+1</b>
<i>Self Awareness</i>	3	3	<b>0</b>
<i>Group Dynamics</i>	1	4	<b>+3</b>
<i>Communication</i>	1	1	<b>0</b>
<i>Context</i>	1	3	<b>+2</b>
<i>Infrastructure</i>	3	1	<b>-2</b>

**Table 4:** The change in significance of key factors.

		Switching To			
		<i>Macro</i>	<i>Legitimate</i>	<i>Task</i>	<i>Social</i>
Switching From	<i>Macro</i>		<i>Group Dynamics</i>	<i>Roles &amp; Responsibilities</i>	<i>Communication</i>
	<i>Legitimate</i>	<i>Infrastructure</i>		<i>Priorities</i>	<i>Communication</i>
	<i>Task</i>	<i>Clearly Defined Goals</i>	<i>Group Dynamics</i>		<i>Infrastructure</i> <i>Communication</i> <i>Group Dynamics</i>
	<i>Social</i>	<i>Clearly Defined Goals</i>	<i>Context</i>	<i>Priorities</i>	

**Table 5:** Key factors increasing most due to switching leadership roles.

		Switching To			
		<i>Macro</i>	<i>Legitimate</i>	<i>Task</i>	<i>Social</i>
Switching From	<i>Macro</i>		<i>Clearly Defined Goals</i> <i>Infrastructure</i>	<i>Clearly Defined Goals</i>	<i>Clearly Defined Goals</i>
	<i>Legitimate</i>	<i>Group Dynamics</i>		<i>Group Dynamics</i>	<i>Context</i>
	<i>Task</i>	<i>Roles &amp; Responsibilities</i>	<i>Priorities</i>		<i>Priorities</i>
	<i>Social</i>	<i>Communication</i>	<i>Communication</i>	<i>Infrastructure</i> <i>Communication</i> <i>Group Dynamics</i>	

**Table 6:** Key factors decreasing most due to switching leadership roles.

# Mapping the transitional experience of switching leadership roles

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2006

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