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Situational Leadership® After 25 Years: A Retrospective

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Executive Summary

The May 1994 American Society of Training and Development (ASTD) meeting will be the 25th anniversary of Situational Leadership. This article by one of the original developers of that model and two of his colleagues reviews work that led to the model's development, revisions that have since improved the model, and extensive research that has been conducted--much of it never before formally published--using the revised model and related instrumentation.



SITUATIONAL LEADERSHIP® **AFTER 25 YEARS:** **A RETROSPECTIVE**

Kenneth H. Blanchard
Drea Zigarmi
Robert B. Nelson

Early Background

Paul Hersey and Ken Blanchard wrote their first article on leadership entitled "Life Cycle Theory of Leadership" for the May 1969 ASTD journal. (1) Ken had come to Ohio University in the fall of 1966 as an administrative assistant to the Dean of the College of Business. Paul had arrived that same year to serve as chairman of the Management Department. Dean Harry Everts put Ken in the Management Department and asked that he teach a course. Initially, Paul was not excited about having Ken dropped in his department, but that fall Ken began teaching.

During that fall Ken heard from students and faculty what a fabulous organizational behavior course Paul Hersey taught. When Ken asked Paul if he could sit in on his class the next semester, Paul replied: "No one audits my course. If you want to take it for credit you're welcome." Even though Blanchard already had his doctorate, he got his ego out of the way and signed up for the course. The course turned out to be as fabulous as he had heard. Paul was a great teacher.

Paul's course ended with a presentation of William Reddin's 3-D Management Style Theory. (2) His work was an outgrowth of the Managerial Grid but suggested that "there was no best leadership style." While Reddin made a significant contribution to the field, Paul and Ken felt his approach still had some limitations. That's when they began to develop the Life Cycle Theory of Leadership. The theory and its name were inspired by the changing leadership style needed by parents as a child grows from infancy through adolescence to adulthood. An infant certainly needs a different leadership style than an adolescent, and certainly a different style as a young adult. Paul

and Ken felt the same logic held true for managing new, developing, and experienced workers.

In June 1967, Paul came to Ken and asked if he wanted to write an organizational behavior book with him. Paul had been in the management field for ten years but had shied away from much formal writing. Ken had always been told by his faculty members in graduate school that his writing wasn't academic enough. He later learned that meant you could understand it, but at that time he had never thought about writing a book. It was with that unlikely writing alliance that Paul and Ken began to more formally develop their thinking about leadership.

In the fall of 1969 their textbook, **Management of Organizational Behavior**, was published by Prentice-Hall. (3) That book is now in its sixth edition and has held steady as a top seller in the field with well over a million copies sold. Twenty-five years of Situational Leadership® is hard to believe and yet the concept is more widely used around the world today than ever before.

An Evolution of Leadership Theories

Hersey and Blanchard continued to work together on the model over the years. Their approach was to build historically on the models that preceded them. Following are the leadership theories that most influenced their work.

Hersey and Blanchard felt that the first important leadership studies were done by Lewin, Lippitt and White. (4) They discussed the difference between autocratic, democratic and laissez-faire leadership. Sometime after that, Robert Tannenbaum and Warren Schmidt came out with a classic **Harvard Business Review** article entitled "How to Choose Your Leadership Style." (5) Their article seemed to take the initial research by Lewin, Lippitt and White and popularize it into a continuum of leadership. While useful, one of the limitations with the continuum approach to leadership is that it was an either/or approach. Either you were autocratic or democratic or somewhere in between--and if you didn't do either, you were laissez-faire.

The first development of leadership as a two-dimensional model was done at Ohio State University by a group led by Ralph Stogdill that included John Hemphill and Andrew Halpin. (6) Their research showed that there were two separate leadership behaviors: "Initiating Structure" and "Consideration." When you contrasted those separate dimensions you ended up with four leadership styles rather than an a single autocratic/democratic continuum.

As happens over the years, good solid research was developed into a training program for practicing managers. Robert Blake and Jane Mouton's Managerial Grid seemed to be an outgrowth of the Ohio State model. (7) They changed the dimensions from "Initiating Structure" and "Consideration" to "Concern for Production" and "Concern for People" and developed what came to be a popular management program. The Ohio State studies implied

that Style 2, high on Initiating Structure and Consideration was the best leadership style and Blake and Mouton picked up that theme and suggested that a 9-9 Style--high concern for People and high concern for Production--was the best leadership style. They called that a "team" style.

Widely respected as the Father of the Contingency Theory of Leadership is Fred Fiedler. In his Leadership Contingency Model (8), he suggested that three major situational variables seem to determine whether a given situation is favorable to leaders: 1) their personal relations with the members of their group (leader-member relations); 2) the degree of structure in the task that their group has been assigned to perform (task structure); and 3) the power and authority that their position provides (position power). Leader-member relations seemed to parallel relationship concepts presented in earlier theories, while task structure and position power, which measure very closely related aspects of a situation, seemed to be associated with task concepts. Ken Blanchard's doctoral dissertation tested Fiedler's model with the chairman of the board and presidents of 20 colleges and universities in New York state.

Taking off from the situational approach developed by Fiedler, William Reddin developed his 3-D Management Style Theory, mentioned earlier. (2) Reddin was the first to add an effectiveness dimension to the task concern and relationship concern dimensions of earlier attitudinal models such as the Managerial Grid. In Hersey and Blanchard's initial Life Cycle model, they built off Reddin's work, trying to emphasize behavioral dimensions rather than attitude, and taking the normative labels off the leadership styles. Reddin's pioneering work influenced them greatly in their development of the Tri-Dimensional Leader Effectiveness Model. (3:128-133) It was in the 1972 edition of **Management of Organizational Behavior** that Hersey and Blanchard first started to use the term Situational Leadership to describe their approach to leadership.

Hersey and Blanchard continued to work together on Situational Leadership until the late 1970's when Blanchard's wife, Dr. Margie Blanchard, and he founded Blanchard Training and Development, Inc. By that time evidence for needed improvements to the model were widely apparent. For example, Graeff and others noted that the LEAD instrument that was used with the original model had numerous flaws that needed to be addressed. (9:285-291). The model and its accompanying instrumentation was thus changed to reflect learnings from experience, research on individual learning and group development, extensive feedback from management clients, and from colleagues at Blanchard Training and Development, Inc. (see Note 1).

Improvements to the Situational Leadership Model

A new instrument called the Leader Behavior Analysis (LBA) was created by Ken Blanchard, Ron Hambleton, Drea Zigarmi and Doug Forsyth in 1982 to correspond with the changes in Blanchard's and his colleagues' thinking. (10) The first publication of the revised model Situational Leadership[®] II appeared in a series of three articles Blanchard wrote for **Executive Excellence** during January-March 1985. (11) Later that year, Situational Leadership II was presented in book form with the publication of **Leadership and the One Minute Manager** by Kenneth Blanchard, Drea Zigarmi and Patricia Zigarmi. (12) The LBA instrumentation was revised that same year to create the LBAII.

The following is an overview of the basic changes that were made to the original Situational Leadership model to create Situational Leadership II, as presented in Figure 1.

Directive/Supportive Dimensions

We found that a manager who practiced Situational Leadership needed to be concerned with both directive and supportive behaviors when seeking to help others to successfully complete a given task. The dimensions of the old model "task behavior" and "relationship behavior" were at times confusing, suggesting, for example, that a manager who used task behavior is concerned only with job accomplishment--an assumption that we believed was unfounded. Likewise, we found that an effective manager who provides socio-emotional support does not do so independently of the task.

Leadership Styles

Three of the four leadership styles were relabeled in the revised model.

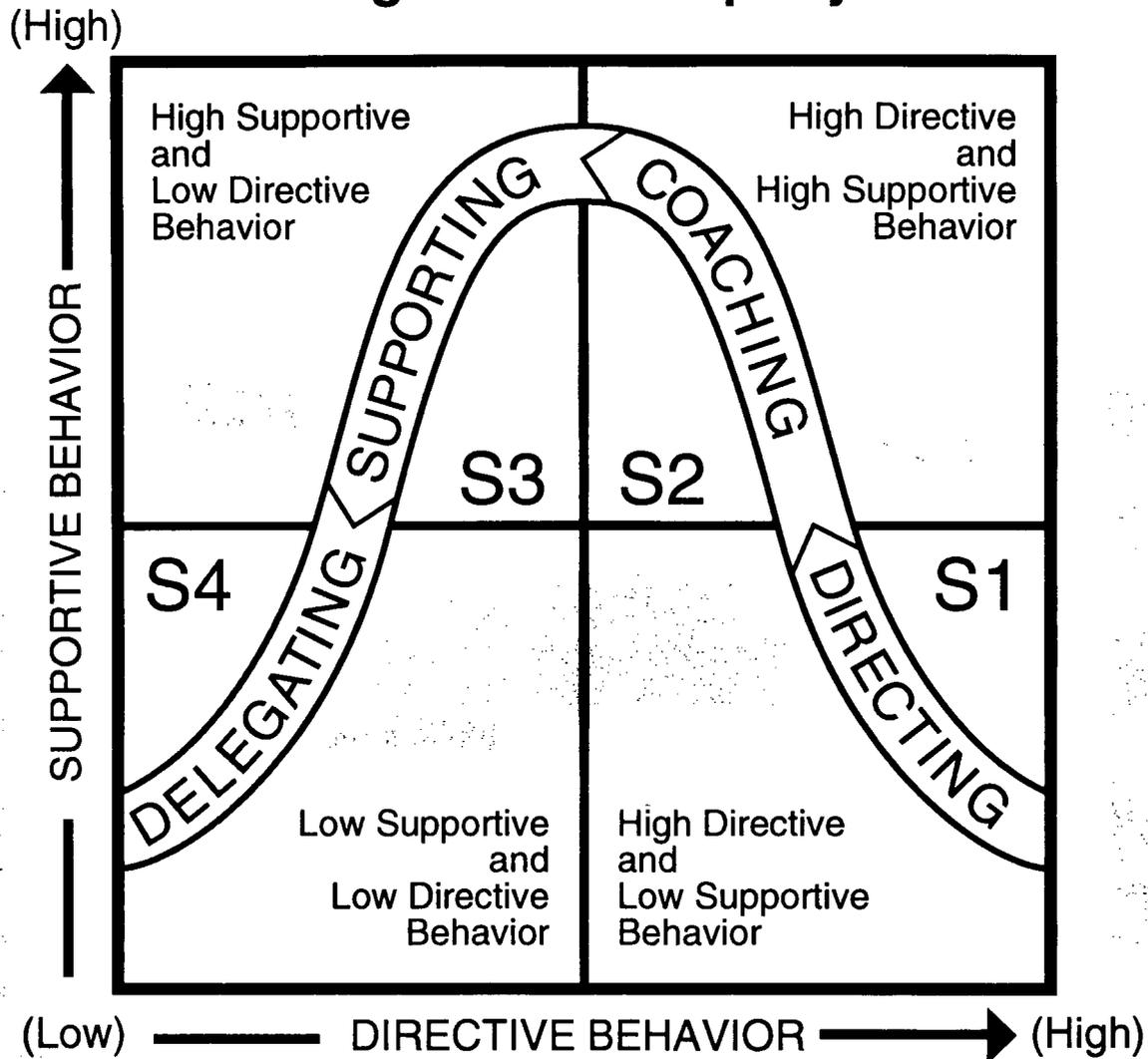
Style 1 became Directing instead of Telling; Style 2, Coaching instead of Selling; and Style 3, Supporting instead of Participating. Styles 1, Directing, and Style 3, Supporting, were relabeled because it made it easier for managers to remember the two dimensions of leader behavior--Directive and Supportive behaviors.

Style 2, Coaching, was relabeled from Selling (old Style 2) because we believed that managers--like coaches--use a combination of leader behaviors, both supportive and directive, when developing people's skills, motivation and confidence. In addition, many managers felt that Selling meant manipulating while we believed that management was more a function of what you did with people rather than to them.

Figure 1:

Situational Leadership® II

Manager Leadership Styles



Developed ← Developing

Employee Development Level

Supporting, Style 3, was also relabeled from Participating (old Style 3), which implied that managers didn't allow participation in the other styles. We determined, however, that the degree, frequency, and type of participation varied from style to style.

Development Level

The term Development Level refers to the extent to which a person has mastered the skills necessary for the task at hand and has developed a positive attitude toward the task. We believe that competence and confidence can be developed when the appropriate leadership styles are used. The old model terms, Readiness and Maturity, were updated because Readiness connoted an attention mode and Maturity was more commonly used to relate to age and personality development. We also learned that it was difficult for most managers to describe someone as low in maturity without implying that he or she was immature.

The old model referred to the two dimensions of development level as Ability and Willingness. The revised model uses Competence instead of Ability because a majority of managers told us that they equated ability with natural ability. We teach instead that skills and knowledge are developed when people receive the leadership style they need from their managers. The revised model uses the word Commitment for Willingness because being unwilling in many countries was interpreted as stubborn resistance. Rather than being resistant, individuals are more apt to lose their commitment to a new job because they feel overwhelmed.

Development Level 1

One of the most significant changes made to the model relates to the way people are perceived at Development Levels 1 (D1). The old model describes a person new to a task as unwilling and unable. Our experience, coupled with the experiences of the managers we've trained, said this isn't true. Most of us hire or promote people who may be low in competence (knowledge and skills), but have high commitment because of their initial motivation and eagerness to learn. Therefore, we believe people at the initial level of development are not unwilling and unable, but rather high on Commitment and low in Competence. As Malcolm Knowles' research on adult learning confirms, people begin learning new skills with high expectations. (13)

Development Level 2

Another change reflected in the revised Situational Leadership model is in relationship to Development Level 2 (D2), which the old model describes as unable but willing. The revised model views a person at D2 as having developed some competence, but having low commitment. Again, managers

told us that someone who has been at a task for a short while is typically discouraged or disillusioned because they realize how far they yet have to go to become competent. This discouragement may be amplified due to insufficient training, supervision or recognition for the job they have done. A manager, we feel, needs to watch for this drop in commitment and adjust his or her leadership style to use more supportive behaviors, that is, he or she should provide more praise, listen more closely to concerns, and encourage employee involvement in decision making at the same time still emphasizing directive behaviors such as explaining how a task should be done and providing follow up to that task as needed.

Development Level 3

The final change in the revised model is regarding Development Level 3 (D3). The revised model describes D3 as high competence with variable commitment. The old model describes D3 as able but unwilling. We made this revision for several reasons:

- Some employees welcome the responsibility of day-to-day decision making, which happens when they move from D2 to D3. These subordinates appreciate their managers' recognition of their competence, but they can sometimes become less committed even though they have the necessary skills. Their confidence and motivation may vary from day to day. In such a situation, managers need to listen more, assist the employee with problem solving and share more information about the organization's operations--all Style 3 supportive leadership behaviors.
- In some instances, employees are competent, but fear additional responsibility. They feel insecure, unready, and dependent on others with expertise. They may lack confidence. Such high competence and variable confidence means they need reassurance and encouragement.
- Sometimes employees can become demotivated or unsympathetic to the task at hand. Such employees need Style 3 because of job-related or non job-related issues that influence their motivation. Either motivation or confidence can cause variable commitment.

Research on Situational Leadership II

Since 1983 over 50 dissertations, masters theses and research papers have been written using the improved LBA and LBAII (see Note 2).

Between 1984 and 1987 the authors strengthened the instrumentation that is used to measure the Situational Leadership concepts of Style, Flexibility and Effectiveness. Content validity, predictive validity and internal reliability properties of the LBA, and later the LBAII, were established. A

comprehensive summary of these studies and instrumentation can be found in **Research on the LBAII: A Validity and Reliability Study** by Zigarmi, Edeburn and Blanchard. (16) What we will present here is a general synopsis of only the research using the LBA or LBAII as it relates to the revised Situational Leadership II model. Because of the improved psychometric properties of the LBA and LBAII, some research findings have been found to be more conclusive.

Before presenting the general findings, let us say one thing that is evident in all the findings. "Pure" demographic studies have yielded almost no significant differences between such demographic characteristics as age, gender, experience, education levels, and so forth. Even in different cultures such as Thailand (17) or Venezuela (18), managers show no significant differences when demographics were analyzed.

We have divided the general findings into studies done with the LBA or LBAII Other and studies using the LBA or LBAII Self. We believe that results from those individuals being managed, that is, the results from studies using the LBAII Other, are more socially significant so those results are presented first.

Meaning of LBAII Scores

For those unfamiliar with the LBA or LBAII, six scores are derived from the instrument, yielding two primary and four secondary scores.

Primary Style Scores

The two primary scores are the Flexibility score and the Effectiveness score. The Flexibility score is a numerical indicator of how often the respondent used a different style (S1, S2, S3 and S4) to solve each of the twenty situations in the LBAII. The more often the respondent chose a single style over the 20 situations, the less Flexibility is indicated in his or her score. The more evenly the four choices appeared over the 20 situations, the more Flexibility is shown in his or her score. The Flexibility is a scale ranging from 0 to 30 and can be subject to traditional parametric statistics.

The Effectiveness score is a numerical representation of the respondent's appropriate use of the chosen style in the light of the situation described. The Situational Leadership model advocates that a certain style is more effective in certain situations. A value is assigned to excellent, good, fair and poor answers, respectively. If the respondent chose all excellent answers, the score would be computed by multiplying 4 times 20 questions answered to produce a score of 80 points.

On the LBAII Self, the Effectiveness score is an indicator of the respondent's diagnostic skill in choosing the appropriate style advocated by the model. There are five situations in which S1, S2, S3 and S4 styles would be more effective, given the competence and commitment of the follower. In the case

of the LBAII Other, the score represents the perceived behavior of the manager applied to the various situations described. The Effectiveness score is the most important score derived from the LBAII instrument based on findings from various studies. The Effectiveness score ranges from 20 to 80 and can be subjected to parametric statistical analysis.

Secondary Style Scores

The secondary style scores of S1 to S4 are frequency counts of the number of times a respondent chose one particular style out of four within the twenty opportunities to do so. Choosing one style from four excludes the other three in each situation answered. The data obtained is thus ipsative (see Note 3) in nature and must be subject to non-parametric statistical analysis in most cases. It should be remembered that the style score is an "extracted" subscore of Effectiveness and, therefore, does not reflect the concept of diagnosis or appropriate use. The cumulative style score does, however, reflect the amount of direction and support most frequently used by the respondent or manager at the time the data was collected.

Findings with the LBA or LBAII Other

One of the key reoccurring findings with the LBA or LBAII Other centers around the concept of Climate or Satisfaction. In five separate studies, researchers found connections between selected climate measures and the effectiveness scores on the LBAII Other instruments. Birden (19); Lobban (20); Stoner-Zemel (21); Wilkinson (22); and Zigarmi, Edeburn and Blanchard (16), found strong positive correlations between Effectiveness scores and selected climate variables.

To highlight three studies, Wilkinson (22), compared high-scoring versus low-scoring leaders on the Effectiveness scores and found a positive relationship between high Effectiveness scores and Employee Satisfaction with Supervisor ($t=3.18$, $p<.001$), Satisfaction with Administration and Policies ($t=2.09$, $p<.019$) and Total Satisfaction scores ($t=1.78$, $p<.039$). Wilkinson's study was in a government agency with an $N=116$.

Stoner-Zemel (21) found positive correlations between high effectiveness scores on the LBAII Other and seven dimensions of employee perceived satisfaction in a business setting. Positive correlations were found between LBAII Effectiveness and employee perceptions of High Performance ($R=.24$, $p<.001$, $N=293$), High Productivity ($R=.25$, $p<.001$, $N=293$), Team Effectiveness ($R=.25$, $p<.001$, $N=293$), Inspiration ($R=.23$, $p<.001$, $N=295$), Alignment ($R=.28$, $p<.001$, $N=292$), Commitment ($R=.12$, $p<.021$, $N=290$) and Feelings of Empowerment ($R=.34$, $p<.001$, $N=292$).

Our research (16) showed that if we compare managers with high Effectiveness scores to managers with low Effectiveness scores as rated by

their employees, that managers who had high Effectiveness scores had employees who had higher Morale ($F=4.29$, $p<.036$, $N=552$) and reported Positive Opportunities for Growth Within the Organization ($F=4.87$, $p<.018$, $N=552$). Also if the manager had high Effectiveness scores the employees reported significantly less Tension in the Organization ($F=6.89$, $p<.001$, $N=552$).

The results of these studies indicate that when appropriate amounts of direction and support are used (as perceived by employees) higher levels of morale and employee satisfaction will result. And if a leader is seen by employees as matching his or her leadership style to their development level more frequently, those employees will tend to be more satisfied with the organization in general. The significance of these findings cannot be underappreciated.

It is easy to produce positive employee climate perceptions while using high Supportive/low Directive behavior. Support without direction costs little in a manager's relationships with others. But the select appropriate use of both support and direction in the course of managing others implies managerial skill in both meeting individual needs and obtaining organizational objectives at the same time.

There are other noteworthy findings using the LBAII Effectiveness score that confirm the findings about various climate studies. Dukes' (23) nursing study, found positive correlations between the Effectiveness score and the PKPCT Barrett Empowerment Scale. Like Stoner-Zemal, she found that managers who are seen by their employees as matching appropriate leadership style with development level were also seen as empowering. Duke found positive correlations with the Effectiveness score and perceptions of the Freedom to Act Intentionally Subscale ($F=4.02$, $p<.01$, $N=324$) and the Involvement in Creating Change Subscale ($F=4.68$, $p<.01$, $N=324$).

In other findings, which enhance the predictive validity of the LBA Effectiveness score, Haley (24) found positive correlations between the Effectiveness score and subordinates' perceptions of managers' Overall Effectiveness ($R=.40$, $p<.001$, $N=95$) and Work Group Effectiveness ($R=.18$, $p<.05$, $N=95$). Jacobsen (25) found positive correlations with the Management Advancement Quotient (MAQ) and the LBA Effectiveness score as rated by employees ($R=.13$, $p<.05$, $N=267$). Managers who have the skill to match leadership style to development level also tend to move up the corporate ladder more quickly. Jacobson also found this positive correlation when using the managers' bosses in the ratings of LBA Effectiveness ($R=.12$, $p<.05$, $N=238$).

The Effectiveness score on the LBAII was further validated in a study done by Price (26) in which he looked at managerial competencies and leadership style. He found positive correlations with nine of the Boyatzis managerial competencies. LBAII Other Effectiveness scores correlated positively with

Efficiency Orientation ($R=.28$, $p<.0001$, $N=334$), Self Confidence ($R=.16$, $p=.12$, $N=344$), Oral Presentation ($R=.16$, $p<.008$, $N=344$), Managing Group Process ($R=.20$, $p<.009$, $N=344$), Socialized Power ($R=.19$, $p<.002$, $N=344$), Developing Others ($R=.20$, $p<.001$, $N=344$), Stamina/Adoptability ($R=.15$, $p<.01$, $N=344$). LBAII Other Effectiveness scores correlated negatively with Spontaneous Behavior ($R=-.28$, $p<.001$, $N=344$). Based on the results of these and other studies not presented here, the ability to match leadership style to development level as measured by others' perceptions can be said to be a crucial managerial skill!

Findings with the LBA or LBAII Self

The findings using the LBA or LBAII Self sometimes suffer from leniency (respondents giving themselves the benefit of the doubt) and inflation (respondents scoring themselves more positively than others perceive them) because of rater tendencies to respond from intent instead of from accurate perceptions of self behavior. Since correlations with other self instruments also have the built-in distortions of a single-rater response set, we will limit our presentation of results to studies that compared LBA or LBAII self ratings to the perception of others on selected instruments that measure various constructs of interest.

For example, Nye (27) found a significant positive relationship between high, moderate, and low Effectiveness LBAII Self scores and the Change Behavior and Innovation Success Survey as seen by others. If the leader scored high in the LBAII Self Effectiveness score they were more apt to be seen by others as supporting innovation. Clark (28) found a positive correlation between the LBAII Self Effectiveness score and student ratings of college teaching effectiveness. Wooten (29), however, found no significant correlations between high and low cognitive level scores and Effectiveness self scores.

In an unpublished study we did in 1992, LBAII Self Effectiveness scores of high and low scoring managers were compared to employees' perceptions of climate and satisfaction. (30) We found correlations with high self Effectiveness scores and positive employee perceptions of Work Involvement ($F=4.30$, $p<.039$, employee $N=243$), Co-worker Competence ($F=4.14$, $p<.04$, employee $N=243$), Opportunity for Growth ($F=7.54$, $p<.006$, employee $N=243$), Morale ($F=3.80$, $p<.05$, employee $N=243$) and Commitment to the Organization ($F=4.57$, $p<.033$, employee $N=243$). It would seem that if managers display appropriate levels of direction and support, they are more apt to have employees who are involved in their work, see their co-workers as competent, see opportunities for growth within the organization, enjoy working for the organization, and are committed to the organization.

Conclusions and Future Research Needs

As we have reviewed the constructive critiques of Situational Leadership, we are continually struck by the mixed results confounded by differing levels of understanding of the model and the review of the research. We wish there were more research studies besides dissertations being conducted on the model and we are beginning to do more of our own studies to help shed additional light on the model.

We believe that the "proof" of the Situational Leadership II model may lie in a mosaic approach in which different pieces are fit together to display an understanding of what happens in the interplay between employees and their manager. To reach that point, research needed includes work on development level, standard instrumentation, and match studies.

Development Level

One building block that needs to be in place to progress further is more knowledge concerning development level. Work must be done to classify or pinpoint others' competence and commitment around a specific task or goal. Wirfs (31) and Clothier (32) were working in the right direction with their research.

Standard Instrumentation

The publication of standard scores from a common instrument is also needed for future studies. After reviewing two meta-analyses, Wiggin (33) and Anderson (34), we agree with Anderson's recommendation that a common leadership instrumentation be used whenever possible. We would ask researchers to consider the use of the LBAII Self and Other instruments for this purpose in their future studies.

Match Studies

Greater emphasis should also be given to "match" studies that examine style in relation to employee perceived development level on a specific goal or task. We ask researchers to understand that correlations of style to other measures will not involve appropriate use based on the model as would use of the Effectiveness score. Therefore, correlations to style, while important and useful, will suggest indiscriminate use over time. If a manager is viewed as using primarily Style 1 or Style 2 leadership behaviors with low Flexibility, for example, then any correlations made with other variables may imply consequences for use of that style over time. While the investigation of extended use of leadership style over time is worthy of investigation, it should not be confused with the appropriate use of style as measured by the LBAII Effectiveness score.

Finally, we respectfully suggest that researchers do more than pure "demographic" studies if they are seeking significant findings (see Note 4). There seems to be no fruitful gains to be made by the examination of any demographic variable except maybe gender. Thirty-two percent of all studies done thus far seem to indicate demographics have little correlation with leadership style. Of the 50 or so studies we have seen, 16 demographic studies were done. These studies typically contained only measures of leadership style and demographics. As one researcher so aptly put it, "the findings of previous investigations and the finding of this study have provided adequate evidence that demographic variables are not meaningful predictors of leadership styles. Replications of this study or similar research studies are not recommended." (18)

In conclusion, we realize that the data on the Situational Leadership model has been mixed for reasons already stated. The model has yet to be investigated conclusively, but there is enough data to suggest that there is benefit in its use. We have embarked on some in-depth studies that we hope will shed light on this historic model and would welcome your efforts to do the same.

Note 1: The impetus to revise the Situational Leadership model was led by Drs. Donald Carew and Eunice Parisi-Carew based on their work with group development theory. Others that played a significant part in this revision were Drs. Kenneth Blanchard, Marjorie Blanchard, Frederick Finch, Lawrence Hawkins, Drea Zigarmi and Patricia Zigarmi.

Note 2: To clearly understand the research trends on the Situational Leadership model, the reader must recognize that the model and the instrumentation have changed. That change has caused the research to be confusing and at times inconclusive. Articles such as Blank, et al, (14) and Johansen (15) cite studies that use the LEAD Self to make conclusions about Situational Leadership even though the failings of the LEAD have been known for sometime. They talk about the model as if Situational Leadership and Situational Leadership II were the same. This is confusing and should be avoided by researchers.

Note 3: Ipsative means a forced choice of one answer precludes the choice of the other options in the question.

Note 4: We would classify a demographic study as one in which the authors' main focus is to describe the sample's demographic characteristics (i.e., age, gender, education, etc.) in relationship to the LBAI scores.

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Editor's Note: When I approached Dr. Blanchard and his staff about the possibility of doing this article, they were gracious enough to listen to our proposal. I frankly thought that would be the end of it...but I was wrong. We are indebted to these good people and we believe the product of their hard work will benefit students of leadership theory around the world.

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