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The importance of leadership: Setting the stage

What is leadership?

It's hard to sum up leadership in one or even a few sentences, but we tend to know it when we see it—it probably wasn't hard for you to quickly think of a great leader and a poor one.

Leadership is complex and important. It's central to every aspect of society, and everyone is impacted and influenced by a leader at some point.

With that said, let's sum it up as concisely as we can before we explore it in more detail.

Leadership is social influence. It is initiating, guiding and influencing the behaviour of others in order to create change that wouldn't happen otherwise.

Leaders need to be able to attract capable people, motivate them to put forth their best efforts and solve problems that arise.

This week, and throughout the course, we'll look in detail at the many factors that influence and contribute to leadership.

Your turn: In your experience

Take some time to think about a project that you were involved in. It could be:

- A school project
- A work project
- An event or celebration you helped organize
- A move from one place to another

Take a moment to review how that project went.

- Was the project a success? For example, did you achieve your goals? Was it completed on time?
- Did the project have a strong or poor leader?
- How did the leader impact the project outcome?
- Was your experience with the project a positive one?

What does your experience tell you about the importance of leadership?

Why is leadership important?

As you'll explore throughout this course, effective leadership is crucial to the success of any project.

There are lots of examples outside of the workplace, however, that really emphasize how important leadership can be.

Social leaders like Martin Luther King Jr. and Susan B. Anthony influenced massive social changes that significantly impacted the lives of many people.

Military leaders like Alexander the Great, Joan of Arc and Julius Caesar influenced the fate of entire nations, as our political and military leaders still do today.

Philosophers and thinkers like John Stuart Mill and Adam Smith proposed ideas that shaped the very nature of our civilization.

When you consider that our lives today are still impacted in many ways by the actions of leaders from decades ago, the importance of effective leadership becomes pretty clear.

Types of leaders

There's more than one way to lead. Two leaders may both be great at solving problems, for example, but they might go about it very differently.

We tend to consider historical leaders as being teachers, heroes or rulers.

Teachers	▼
Heroes	▼
Rulers	▼

You're probably familiar with some of these names, and they illustrate how leaders can take very different approaches.

We'll explore different leadership styles in more detail later on.

How does someone become a leader?

Are leaders born or are they made? What matters more, the individual or the environment?

We've been asking, debating and studying these questions for a long time. We know now that individual qualities and environmental factors are both important elements of leadership.

Historically, people leaned more towards the idea that it's all about the individual.

Ralph Stodgill, a prominent leadership scholar, identified several traits that are associated with leadership, including:

- Strong drive for responsibility and task completion
- Vigour and persistence
- Originality in problem-solving
- Initiative in social situations
- Self-confidence and a sense of personal identity
- Willingness to accept consequences of decisions and actions
- Readiness to absorb interpersonal stress
- Willingness to tolerate frustration and delay
- Ability to influence behaviour
- Capacity to structure social interaction systems to the purpose at hand

He proposes that this combination of traits differentiates:

Leaders from followers	Effective leaders from ineffective leaders	Upper echelon leaders from lower echelon leaders
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More recently, we've started to view leadership as something that is acquired due to a number of factors, including the environment and personal circumstances. This way of thinking helps explain why leaders who are successful in one situation aren't successful in another.

The fact that conceptions of leadership vary across cultures supports this idea.

The ancient Egyptians, for example, demanded that their leaders demonstrate authority, discrimination and just behaviour above all else.

In contrast, an analysis of Greek literature showed that the ancient Greeks valued many different leadership qualities, including:

- A sense of justice and strong judgment

- The ability to provide wisdom and counsel
- Shrewdness and cunning
- Valour and willingness to take action

More recently, a study by the United States Chamber of Commerce found that people want their leaders to have, in this order:

Job-knowledge

People-building skills

Clearly, people in different times and places think differently about leadership.

Here's another example: Take a look back through the leaders we've talked about so far. How many are men? How many are women?

You may have noticed that historically, male leaders far outnumbered female leaders. This fact strongly supports the idea that leadership is, at least in part, a social phenomenon.

Consider the example of Edith Wilson.

It's well documented that she governed the United States while her husband, President Woodrow Wilson, was incapacitated. However, at the time, she received no credit for her leadership—this wouldn't have been in line with the norms of the time.

While gender balance in leadership isn't necessarily where it needs to be, the fact that we can point to many more women in leadership positions today—whether in politics, business or other contexts—illustrates that perceptions of leadership can change over time and are influenced by cultural norms.

Opportunity is another environmental factor that influences leadership.

New leaders often arise, for example, during times of social crisis when there is a leadership void. A famous example is Lech Walesa, who went from working in a shipyard to leading Poland's national labour union in the 1980s before ultimately becoming President of Poland in the 1990s.

Opportunity includes having the opportunity to learn how to lead. The aforementioned study by the United States Chamber of Commerce identified the top three ways that people learn to lead:

Examples or models

Books and school

The key takeaway is that both individual qualities and environmental factors are important elements of leadership—you can't separate one from the other.

Leadership satisfactions and frustrations

When you think about being in a leadership role, how does it make you feel?

Does it seem appealing? If yes, why? If no, why not?

Leadership has both positive and negative aspects. Andrew DuBrin identified seven satisfactions and frustrations that leaders typically experience.

Frustrations

Do any of these stick out to you as important? Are any of them surprising?

In the future, as you consider leadership roles, keep both the potential satisfactions and frustrations in mind.

Leadership vs. management

When talking about leadership in the workplace, it's important to distinguish between leadership and management. These terms are often used to mean the same thing, but they're actually quite different.

Leadership vs. management

Management	Leadership
<p>Management involves four key functions, as identified by Henri Fayol:</p> <ul style="list-style-type: none">• Planning• Organizing• Directing	<p>Leadership is commonly used to describe what takes place in the first three management functions:</p> <ul style="list-style-type: none">• Establishing a direction (planning)• Aligning people and resources (organizing)

<ul style="list-style-type: none">Controlling	<ul style="list-style-type: none">Energizing people to accomplish results (directing) <p>Notice the absence of “controlling”.</p>
Managers are formally chosen and have formal authority and accountability.	Leaders aren't always formally chosen (anyone can demonstrate leadership).
Managers focus on order, consistency, results and getting the job done on a daily basis—a bottom-line focus .	Leaders focus more on the big picture and how to produce change—a top-line focus .

These differences are important. John Kotter, a well-known business author, has argued that many organizations focus too much on control (which is associated with management) and not enough on motivation and creativity (which are associated with leadership).

Caring leadership

If a leader simply doesn't care, it won't matter if they're a hero, a ruler or a teacher, or what individual qualities they have.

Caring leadership involves two key aspects:

Concern for people





The leadership equation

The leadership equation

We've taken a high-level look at what leadership is and why it's important. Now, let's dive a bit deeper by exploring some leadership theories and research on what makes leadership effective.

Trait theory

According to **trait theory**, leadership effectiveness is determined by a leader's physical and psychological characteristics.

Three traits in particular are considered important:

- Basic intelligence
- Clear and strong values
- High levels of personal energy

Trait theory has been applied in many contexts. Perhaps most famously, Paul Von Hindenberg, Germany's second president following World War I, used trait theory for selecting and developing leaders.

He identified two qualities that determine leadership ability:

Intelligence

Vitality

For example, someone deemed bright and energetic would be developed as a field officer, while someone who was believed to be bright, but lazy, would be developed as a staff officer.

Building on the work of early learning theorists, Edwin Ghiselli studied hundreds of managers and identified six traits of effective leaders:

- A need for achievement
- Intelligence
- Decisiveness
- Self-confidence
- Initiative
- Supervisory ability

Leadership behaviour theory

Leadership behaviour theory began to develop in the 1930s, as researchers in psychology started to study behaviour more extensively.

While trait theory focuses on a leader's personal characteristics, **leadership behaviour theory** focuses on a leader's behaviours.

Here are some key findings from the field.

The psychologist Kurt Lewin identified three leadership styles in his research:

Authoritarian

Democratic

Laissez-faire

In the 1940s, Ralph Stogdill and others at Ohio State University developed the Leader Behaviour Description Questionnaire (LBDQ), in which respondents describe their leaders' behaviours in two leadership dimensions:

Initiating structure

Showing consideration

Rensis Likert of the University of Michigan studied how a leader's behaviour impacts worker motivation and group performance. He found that they are both impacted by behaviours associated with two leadership dimensions very similar to those identified in the LBDQ.

Namely, the extent to which the leader is:

- Job-centered (similar to initiating structure)
- Employee-centered (similar to showing consideration)

Robert Blake and Jane Mouton used the leadership dimensions identified by Likert and Stogdill to develop the **managerial grid for leadership effectiveness**. This tool categorizes leaders based on the extent to which they show concern for production (are job-centered) and show concern for people (are employee-centered).

They defined five major leadership styles based on their work:

Impoverished

Sweatshop

Country club

Status quo

Fully functioning

They also proposed two additional leadership styles:

- **Paternalistic:** High concern for production combined with use of rewards to encourage compliance and loyalty
- **Opportunistic:** High concern for personal advancement

Leadership contingency theory

Both trait theory and leadership behaviour theory were focused on finding a single leadership style that was best for every situation.

As time went on, it became more and more apparent that this simply wasn't possible. This led to the development of **leadership contingency theory**, which proposes that the most appropriate leadership qualities and actions will depend on the situation.

According to leadership contingency theory, leadership effectiveness depends on:

- **The leader:** Different leaders will have different qualities, values and skills.
- **The followers:** Experienced followers, for example, may need different leadership than less experienced followers.

- **Situational factors:** The job being performed, the workplace culture and the urgency associated with the task, for example, will influence what leadership is needed.

We'll break down each of these factors in more detail later.

According to leadership contingency theory, leadership is effective when the ideas and actions of the leader match the needs and expectations of the followers in a particular situation.

Transformational leadership

In the 1970s, J.V Downton introduced the idea of **transformational leadership**, which he described as the use of optimism, charm, intelligence and other personal qualities to motivate, inspire and transform individuals and organizations.

James MacGregor Burns built on this idea and distinguished between transformational leaders and transactional leaders.

He proposed that **transactional leaders**:

- Focus on exchanges between leaders and followers
- Focus on clarifying employees' roles
- Provide rewards based on performance

In contrast, **transformational leaders**:

- Focus on the potential relationship between them and their followers
- Inspire and motivate others
- Fully engage and care about others
- Inspire loyalty

Nelson Mandela and Barack Obama are both great examples of transformational leaders who inspired and motivated others.

Charisma is a fundamental characteristic of transformational leaders, who can often inspire others and encourage loyalty because they:

- Demonstrate competence, which encourages respect
- Show ambition and a strong sense of purpose
- Have ideological goals with moral overtones
- Role model the beliefs and values they want their followers to adopt
- Are self-confident
- Communicate high expectations and show confidence in others' ability to meet those expectations
- Motivate others to take action

Research shows that transformational leadership has a more positive impact on performance and creates higher levels of motivation and organizational commitment.

Importantly, transformational leadership can occur at all levels of an organization—you don't need to be in a formal leadership role to be a transformational leader.

Your turn: Watch a leadership TED talk {[Week 1, Discussion post](#)}

As you've seen, there are a lot of ideas out there about what a leader should be and what makes leadership effective. In fact, one of the things that's most interesting about leadership is that everyone seems to have an

opinion on it.

Take some time now to choose and listen to a HBR podcast on leadership.

Here's what you need to do:

1. Visit the HBR Leadership website: <https://hbr.org/2023/05/podcast-hbr-on-leadership>
2. Choose a podcast that strikes you as the most interesting.
3. Sit back and listen!
4. Make a brief post on the discussion board under "Leadership talks" where you explain:
 - a. What video you chose and why
 - b. 1–2 interesting things you learned about leadership
 - c. Anything that was surprising or challenged your existing ideas about leadership

Transformational Leadership

Transactional Leaders

Transform

Focus on
exchanges
between leaders
and followers

Inspire and
motivate others


Provide
rewards
based on
performance

Inspire loyalty

Focus on the pote
relationship between
and their followe

✓ Check

↻ Reuse

  **Listen** 

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Leaders, followers
and situational factors

As you saw when we reviewed leadership contingency theory, there are three factors that influence the leadership process:

- The leader
- The followers
- Situational factors

Let's take a look at each factor in more detail.

Ten key leadership qualities

We've already touched on some important leadership characteristics, but let's tie it all together with a detailed look at ten key leadership qualities.

Vision	▼
Ability	▼
Enthusiasm	▼
Stability	▼
Concern for others	▼
Self-confidence	▼
Persistence	▼
Vitality	▼
Charisma	▼
Integrity	▼

Negative leadership behaviours

Just like a great leader can motivate and inspire others, a poor leader can have a negative effect on their employees and their organization.

Research findings consistently show that both successful and unsuccessful leaders are typically smart, ambitious and have solid technical expertise.

However, unsuccessful leaders tend to exhibit certain behavioural patterns that successful leaders don't, including:

- Failure to meet performance objectives
- Inability to build and lead a team
- Inability to build positive relationships with co-workers
- Inability to adapt to changing personnel and situations
- Inadequate preparation for promotion

Failure to meet performance objectives is a negative leadership behaviour

☐ True

☐ False

✓ Check



Why are some leaders successful while others aren't? What do unsuccessful leaders do differently?

In her research, Barbara Kellerman identified six common negative behaviours of poor leaders:

Rigidity

Intemperance

Corruption

Cruelty

Another particularly destructive quality for a leader is narcissism.

A narcissist will tend to:

- Brag about how great they are, even when others know they're exaggerating or lying
- Seek attention and always try to be the "star of the show"
- Put their needs before the needs and well-being of others
- Blame others for their failures
- Refuse to apologize when they make mistakes

Earlier, you reflected on someone you consider to be a poor leader. Would some of these characteristics apply to them?

Leadership styles

Earlier, we discussed Kurt Lewin's three leadership styles: Authoritarian, democratic and laissez-faire.

Today, these are more commonly referred to as directive, participative and free-rein. Let's look at each style in more detail.

Participative

Free-rein

There are some key points you should remember about leadership styles:

- People develop their preferred leadership style through modeling others, formal training and learning from personal experience.
- People usually prefer the same style of leading and following.
- Directive, participative and free-rein leaders have all been successful in different situations.
- There is no universally effective leadership style, and leaders may shift styles depending on the situation.

For example:

- A directive leader may not appreciate a free-rein follower challenging their decisions or acting on their own.
- A directive follower may be frustrated if their free-rein leader doesn't provide much detail on how to do a job.
- A participative follower may be upset if their directive leader doesn't ask for their input.

When styles don't match, the leader needs to show extra patience and consider others' preferences when it comes to decision-making, goal setting and communication.

Your turn: What's your leadership style?

If you had to describe your leadership style, would say it's directive, participative or free-rein?

If you haven't been in a leadership position before, what do you think your style would be?

Once you've thought about it, take some time to complete the "What is Your Leadership Style?" survey in your textbook (Exercise 3-4).

Characteristics of followers

Two key characteristics of followers influence the leadership process:

- Respect for authority
- Interpersonal trust

This probably seems like common sense. It's not hard to imagine that it would be easier to lead someone who respects authority figures and tends to trust people than someone who has no respect for authority and is generally suspicious of others.

These tendencies can be measured using the **Interpersonal Trust Scale**.

A high score reflects a tendency to trust and be open to suggestions from others.

A low score reflects a tendency to be less trustful and to manipulate others in order to accomplish goals.

If you're curious, you can take the test yourself in your textbook and see where you fall on the scale.

Generally speaking, trust in leadership has declined in many societies over time. Attitudes towards authority have changed in Western societies in particular over a number of decades.

Many explanations have been proposed to explain these trends. However, probably no factor is more important than the many cases where people in leadership positions have pursued their own interests at the expense of others.

It's important for leaders to be aware of these attitudinal shifts and to take steps to earn their employees' trust.

Stuart Levine and Michal Crom identify six ways that leaders can build trust:

- Deal openly with everyone
- Consider all points of view
- Keep promises
- Give responsibility to others
- Listen to understand
- Care about people

The impact of situational factors

Like leaders and followers, situational factors also impact the leadership process.

These factors, in particular, are important:

The size of the organization



Social and psychological climate



Employment patterns



Type of work



Place and purpose of work



Types of intelligence

Intelligence is an important variable in the interactions between leaders, followers and situational factors. Different situations may require different kinds of intelligence. Leaders should be familiar with two kinds of intelligence, in particular.

Fluid intelligence

Being an effective leader today

Our expectations of and demands on leaders have changed significantly over time.

Over the last 70 years or so, workplace cultures have undergone a dramatic shift, particularly in Western cultures, from a focus on hierarchy to a focus on community. In a sense, they've shifted from being more directive to being more free-rein.

In the past, leaders ruled with authority. They forced employees to respect them and obey orders or face the consequences. We know now that this approach simply doesn't work anymore—people who feel oppressed aren't productive, don't cooperate and don't produce high-quality work.

Research suggests that modern leaders see their job as motivating their employees to do their best, acting as a facilitator rather than a ruler. They also believe that respect and trust are earned, not demanded.

As a result, the focus of leadership has shifted from controlling and directing employees to managing relationships. This has added new demands to traditional leadership duties.

Being an effective leader today

Traditional duties	New demands
Give orders	Empower people
Implement plans	Generate ideas
Manage individuals	Coach teams
Do things right	Do the right things
Organize work	Develop people

To sum it all up, leadership is difficult, and it can be more of an art than a science.

An effective leader today needs to be:

- A director and a motivator
- An implementer and an innovator
- A mentor and a team builder
- An expert and a moral force
- An organizer and a developer of people

Your turn: Projectified!™ podcast

What does it take to be an effective leader in a rapidly shifting business environment? Get the answers on Projectified™, a series of free podcasts from the Project Management Institute.

On the episode titled: Leadership—New Skills for an Age of Flux, guests discuss in-demand leadership skills and how to keep fast-moving projects on track.

Take some time now to listen to this podcast from the Project Management Institute.

1. First, subscribe to the Projectified™ podcast on your platform of choice: <https://www.pmi.org/learning/training-development/projectified-podcast> (<https://www.pmi.org/learning/training-development/projectified-podcast>)
2. Then, select **Leadership—New Skills for an Age of Flux**, sit back and listen!

Project Management Institute. (2018, November 14) Leadership—New Skills for an Age of Flux

Retrieved from <https://www.pmi.org/learning/training-development/projectified-podcast> (<https://www.pmi.org/learning/training-development/projectified-podcast>)

Summary

Key take-aways

Here are a few key take-aways from this week's information and learning activities.

- Leadership is social influence; it is initiating, guiding and influencing the behaviour of others to create change that wouldn't happen otherwise.
- Leaders tend to have certain qualities, but both individual qualities and environmental factors are important elements of leadership.
- There are a variety of leadership styles and no one style is the best for every situation.
- There are common satisfactions and frustrations that leaders typically experience.
- Leadership effectiveness depends on the interaction between the leader, the followers and situational factors.
- Perceptions of leadership, and expectations and demands on leaders, vary across cultures and have changed significantly over time.

Next week, you'll learn about the importance and power of vision in leadership.

Take care until then.