© *Academy of Management Journal*
2022, Vol. 65, No. 4, 1240–1273.
https://doi.org/10.5465/amj.2019.0162

STRANGER LEADERS: A THEORY OF MARGINAL LEADERS' CONCEPTION OF LEARNING IN ORGANIZATIONS

GIANPIERO PETRIGLIERI
ANNIE PESHKAM
INSEAD

Through an inductive study of learning and development (L&D) executives in 69 multinational organizations, we build a theory of marginal leaders' conception of learning in organizations. We found that, as marginal leaders, L&D executives lacked an established template for their leader identity and had to navigate conflicting prescriptions for their function. The conception of learning—a process that involved finding a place in relation to significant counterparts, taking a stance on learning, and building learning spaces—allowed them to craft identities that gave meaning and direction to their work, grounding their identity as leaders. Not all marginal leaders took the same trajectory toward firm ground for their identities. Some left the margins to lead, embracing either an instrumental or a humanistic view of their function. Others learned to lead from the margins, casting that duality as a paradox. Taking a systems psychodynamic approach to examine marginal leaders' trajectories through a defining duality, this study reveals the interplay between existential and strategic layers of leader identity construction. Theorizing the conception of learning as the process through which leadership comes to life and becomes organized, the study expands and bridges the literatures on leader identity and on the management of dualities.

At the dawn of the millennium, the late Jack Welch took the stage in the largest auditorium at Harvard Business School. He was then the celebrity CEO of General Electric, a role he had occupied for 20 years. Fortune had recently named him "manager of the century" (Colvin, 1999) for his accomplishments at the helm of the company where he had spent his whole career. However, the lesson Welch had in store for the aspiring executives in the audience was to prepare for a different journey. They should not expect to rise through the ranks of a loyal employer, as he had done. The deal had changed. Good companies, he proclaimed, "can guarantee lifetime employability by training people, making them adaptable, making them mobile to go to other places to do other things. But [they] can't guarantee lifetime employment" (as cited in Davis, 2015: 1).

Two decades later, Welch's radical reframing of the social contract has become a cliché. Many firms have replaced the promise of loyalty with the promise of learning, coopting the language of educational institutions. Headquarters have become "campuses," former employees are "alumni," and research has suggested that this pays off. Learning is regarded as "critical to the performance and long-term success of organizations" (Argote & Miron-Spektor, 2011: 1123) and valuable for individuals in uncertain careers (Arthur, 2008; Petriglieri, Petriglieri, & Wood, 2018). This turn to learning is part of a broader trend, an emphasis on humanistic concerns meant to counterbalance the instrumental focus on profitable efficiency of contemporary business practice (Martin, 2020).

We have become accustomed to leaders who praise and promise learning—or diversity, integrity, and sustainability. However, we know little about what it means, and what it takes, to keep those promises. Learning, for example, "has been proposed as a

We are grateful to Spencer Harrison, Herminia Ibarra, Ella Miron Spektor, Jennifer Petriglieri, and attendees at the INSEAD inductive research brown bag and systems psychodynamic research gatherings for their caring and creative comments on this paper. We are also grateful to Tobias Dennerlein, Jim Detert, Sally Maitlis, Daan Stam, and Hannes Leroy for kind invitations to present this work at IESE, the University of Virginia Darden School of Business, the Said Business School at the University of Oxford, and the Rotterdam School of Management, and for their feedback. Finally, this paper owes its existence to the persistent holding and insightful guidance of AMJ Associate Editor Wendy Smith, and to the generous suggestions and spirited challenges of three anonymous reviewers.

fundamental strategic process and the only sustainable competitive advantage," but "researchers have not delineated the specific behaviors and mechanisms through which leaders impact learning (Vera and Crossman (2004: 222). When we study (Glynn & Raffaelli, 2010) and develop (Mabey, 2013) leaders, we are more likely to focus on how they impact some measure of performance instead. As a result, learning has been described as "the most neglected celebrated activity in the workplace" (Petriglieri, 2014: 1), and it remains at the periphery of the study and practice of leadership.

This position is reflected in the status of a cadre of leaders tasked to fulfill the promise of learning. A book on the work chief learning officers (CLOs) noted that these executives are "in a unique position to add significant value" (Elkeles & Phillips, 2007: xiii), and yet portrayed them as needing to constantly defend their work to performance-obsessed and cost-conscious colleagues in the C-suite. "Learning should be high up on the business agenda, but too often, learning professionals lack credibility and influence as business leaders," a Corporate Research Forum report concluded a decade later (Pillans, 2017). Those who aspire to lead learning, it seems, have to justify their existence as leaders in the organization in order to pursue the strategic imperative of learning for the organization. We set out to study why that is the case, and how they go about it.

We report the findings of an inductive study of senior executives in charge of learning and development (L&D) at 69 multinationals, focusing on their experience and development as leaders. Despite a position in their firms' upper echelons, we found, our informants were marginal leaders. To varying degrees, they were strangers of sorts, in the sense first articulated by Simmel (1908/1950) and Park (1928)—insiders with loose ties to the establishment, caught between different principles, desirable and suspicious at once. Lacking the anchors of an established profession or a clear organizational mandate left these leaders exposed to a defining duality—that is, contrasting views of their function. Forced to navigate these conflicting currents, our informants took one of three routes toward the shore of a leader identity that secured their place and informed their work. We labeled these identities custodian, challenger, and connector. The first two helped informants leave the margins. The third one, to lead from there. All three were products of a process that moved leaders to treat their function, learning, as an instrumental enterprise, as a humanistic one, or as a paradox that required holding both poles. We named that process the conception of learning.

Our study builds on the premise that leadership is neither a position nor just an activity—it is an identity. Becoming a leader requires internalizing and embodying the meaning of leadership in one's context (DeRue & Ashford, 2010). It is, in essence, a learning process. In many cases, that process involves learning to adapt to an established template of what leadership means and what leaders must do (Ibarra, 2015). In some cases, however, there is no such template and leaders face conflicting prescriptions. The latter is the predicament of marginal leaders such as those we studied. We took a systems psychodynamic approach to examine how they navigated these conflicting prescriptions. This approach is well-suited to the study of multilevel processes, such as leadership, that involve intrapsychic, interpersonal, and institutional forces (Pratt & Crosina, 2016). Leaders are "neither born nor made," seen from a systems psychodynamic perspective—instead, "they are fabricated" (Petriglieri & Petriglieri, 2020: 431). What leadership means, and what leaders do, is the result of an interaction of personal motives and collective demands that are often conflicting and seldom conscious (Petriglieri & Petriglieri, 2015). Reading our findings through this lens helped us theorize how our informants' learning of leadership and their leadership of learning produced a leader identity. The result is a theory of marginal leaders' conception of learning in organizations.

We chose the term conception purposefully, as it evokes the encounter of wishes and norms in the making of leadership (conception is a process contested by instincts and institutions). The word conveys the combination of imagining, relating, and bringing to life that emerged from our data. Finally, the image of conception hints to a more intimate, delicate, and organic process nested within what scholars have often referred to as the "construction" of an identity. In line with a view of leading and organizing as instances and outcomes of identity work (Brown, 2019), we propose that the conception of learning underpins the construction of leadership, binding the crafting of a leader identity *in* the organization to the crafting of a leader's strategy *for* the organization.

How leaders conceive why learning matters and what learning counts influences the work, if not the lives, of employees, and the culture, if not the fate, of organizations. Studying leaders' conceptions of learning, therefore, has both theoretical and practical significance. Our study expands the literature on leader identity development. Concentrating on marginal leaders, who cannot quite fit into an existing

template, we reveal how such templates come into existence. By focusing on the existential struggle and strategic choices that lie beneath and beyond interpersonal identity work, we cast light on the process of bringing leadership to life, not just leaders into roles. We also contend that all leaders, to some degree, must deal with defining their function as an instrumental enterprise, a humanistic one, or both. Marginal ones, however, need to deal with that duality more consciously. Hence, studying them bridges the literature on leader identity to that on the management of paradoxes. Our theorizing outlines the learning process that moves some leaders to treat the duality as a friction to be resolved, and others as a paradox to be held. It involves finding a *place* as a leader, which informs the *stance* one takes and the *space* one makes for others.

L&D executives, as noted above, are an "extreme case" (Eisenhardt, 1989) of a broader cadre of leaders whose identity—and existence—brings into question mainstream templates of what leadership is and what leaders must do. Their *raison d'être* is to challenge and broaden the single-minded pursuit of efficiency and material returns that still dominate the practice of leadership in organizations (Martin, 2020). Companies have been hiring heads of learning, ethics, diversity, sustainability, and so on, to lend credibility to claims that they are communities, not just machineries, and to prove that their leadership is equally concerned, in the words of a recent CEO manifesto (Business Roundtable, 2019), with profits and purpose. Our findings lift the veil on what happens after those hires are made. Our theory suggests that how those marginal leaders respond to their organizations' loose and ambivalent embrace affects whether and how those leaders and their organizations fulfill the promise of conjugating instrumental and humanistic aims.

THE AMBIGUITY OF LEADERSHIP AND THE DUALITY OF LEARNING

As is common in qualitative studies, our focus sharpened over time. We began with a broad interest in an executive population that has risen in influence but received scant scholarly attention. As we moved between data and literature, we became attuned to the parallels between informants' talk of struggling to "find a place" and to articulate a "philosophy of learning," and scholars' texts on leader identity and learning paradoxes. Through these iterations, we settled on the following research question: *How do marginal leaders navigate defining dualities in organizations?* In the sections below, we conform to the custom of turning the fits and starts of an iterative process into a smoother, linear account. We review the literature that informed our data collection and analysis first. We then report our study's methods, expose its findings, and discuss its contributions.

The Ambiguity of Leadership

A secular trend in the study of leadership has seen scholars moving away from treating it as a synonym for a position at the top of a hierarchy (Ancona & Backman, 2008), or for the traits and activities that let one individual influence others (Bryman, 1986), and toward inquiring about how leaders emerge and operate in social interactions (Lord, Day, Zaccaro, Avolio, & Eagly, 2017). The quest for a "dynamic and contextually sensitive" understanding of leadership (Lord, Gatti, & Chui, 2016: 119; DeRue, 2011) has motivated a burgeoning stream of research suggesting that leadership is best understood as an identity (DeRue & Ashford, 2010; for a review, see Ibarra, Wittman, Petriglieri, & Day, 2014). Seen this way, leaders earn followers' trust because they embody identities that those followers hold dear (van Knippenberg & Hogg, 2003). This view implies that becoming a leader takes identity work (Snow & Anderson, 1987)—that is, efforts to craft, claim, and receive validation for one's "leaderly-ness." When such work is successful, people view themselves and act as a "leader" and others validate that view (DeRue & Ashford, 2010). That validation, in turn, makes leaders more likely to seek opportunities to lead (Day & Harrison, 2007), to be effective (Day & Sin, 2011), and to grow further as a leader (Lord & Hall, 2005).

Theoretical perspectives suggest that the meaning of "leader" is not univocal or universal. DeRue and Ashford (2010) argued that precisely because the term entails an ambiguous identity—it can have different meanings in different contexts, for different groups, and at different times—its attainment and maintenance requires ongoing work. That work entails selecting a viable meaning of leader, which suits oneself and is valued in one's social context, among the various ones that inform the study, teaching, and practice of leadership (Petriglieri & Petriglieri, 2015). To date, scholars have documented and critiqued various popular images of leadership (e.g., Alvesson & Spicer, 2010; Hatch, Kostera, & Kozminski, 2009; Lemoine, Hartnell, & Leroy, 2019); observed that people select those templates that bridge their histories and aspirations (Shamir & Eilam, 2005; Zheng, Meister, & Caza, 2020), or theorized about the emergence of different

leadership templates in groups without a preexisting one (Wellman, 2017). Most empirical research, however, like most popular writing, has perpetuated "a denial of the ambiguity of leadership and the uncertainty it provokes among those who try to explain or exercise it" (Petriglieri & Petriglieri, 2015: 635; see also Alvesson & Spicer, 2010; Bolden & Gosling, 2006). In the "nascent field of scholarship" (Day & Dragoni, 2015: 134) on leaders' development, little empirical research has examined how people come to sift through and embody different and perhaps conflicting meanings of leader.

Some of these meanings, it appears, are more viable and popular than others. Analyzing leadership studies in top management journals, Glynn and Raffaelli (2010) found a lopsided duality at its core. Scholars either portrayed leaders as agentic individuals who influence others to achieve financial, or otherwise measurable, performance outcomes, or as symbols of their organizations' cultures and values (leaders in our studies, apparently, either move people or stand for them). The former portrait was far more common, and the streams of scholarship legitimizing each image were segregated. The dominance of a functionalist perspective, focused on getting others to achieve specific goals, also transpires from reviews of leadership case studies (Anteby, 2016), and leadership development in general (DeRue, 2011; DeRue & Myers, 2014) and within organizations (Mabey, 2013). While many such reviews end with calls to challenge the dominant functionalist portrait and broaden the meaning of leadership by acknowledging its duality in research and practice, we still know little about the vicissitudes of those who take the risk to do so.

Scholars have often assumed that in any context there is one dominant template of leadership—if not clearly articulated, at least embodied by role models—and that aspiring leaders must adapt to it, with a few personal touches, following in the footsteps of the consultants and bankers lock-stepping into senior roles in Ibarra's (1999) seminal work. Alternatively, aspiring leaders can resist the pull of dominant templates and carve a niche among likeminded people that help them sustain an identity in opposition to their field's norms, like the health workers in Chreim, Langley, Reay, Comeau-Vallée, and Huq's (2020) study of counterinstitutional identities. That might well be the predicament that many new leaders face: having to craft identities that either fit or reject dominant expectations of who leaders are in their group or organization. In that predicament, the meaning of leadership is ambiguous at the global, conceptual, level, but it soon becomes clearer at the local, practical, level—once a person steps into a specific leadership role. As a result, it is fair to assume that there is more ambiguity in leadership than there is among leaders.

If we want to move ambiguity from theoretical work to empirical research, however, we must relax that assumption. We must study leaders who do not leave ambiguity behind once they step into a local role, but instead find it in the very definition of their role. That is the predicament of leaders whose function is loosely defined and may be controversial. It is a predicament that awaits more and more leaders, Lord, Gatti, and Chui (2016: 130) argued, as organizations become more complex and "focused not just on the bottom line in terms of profits, but also on social and sustainability issues." However, it is most salient for a vanguard of marginal leaders, whose function binds them to work and words that can be interpreted in multiple and contrasting ways.

Chief ethics, sustainability, diversity, or learning officers, who are relatively new entrants in corporate leadership circles, potentially fall into this category. They are no longer emergent leaders, in that they have a formal leadership role, but they are not established ones either, in that their identity as leaders is unclear. We use the term marginal here in the sense first articulated by Simmel (1908) in his essay on "The Stranger" and Park (1928) in his theory of the "marginal man," and later refined by Stonequist (1935) and Hughes (1945). That is, insiders in a social circle who do not quite fit the mainstream, could complement it or challenge it, and whose position forces them to experience a struggle with who they are and what they are doing in and for that circle. Scholars have documented how chief ethics and compliance officers, for example, strive to earn legitimacy (Treviño, den Nieuwenboer, Kreiner, & Bishop, 2014), or how sustainability managers carve their roles amid the demands of their organization and the latitude of their discretion (Sandhu & Kulik, 2019). However, they have yet to cast light on how such leaders deal with a key feature of the marginal experience: confronting two powerful, if unequal, sources of self-definition. That confrontation is perhaps most inevitable, and hence most visible, among leaders of learning, because learning encompassed a defining duality long before it became a corporate function.

The Duality of Learning

Learning is a broad and multifaceted process. There are numerous theories of what people should be learning at work, how they learn best, and how their learning translates into organizational outcomes

(for reviews, see Aguinis & Kraiger, 2009; Noe, Clarke, & Klein, 2014). Underlying these theories are contrasting views of the purpose of learning—that is, why people must keep learning. Going back to foundational work on experiential learning (Dewey, 1938), human development (Piaget, 1969), and adult education (Knowles, 1970), scholars have drawn a distinction between learning that sustains incorporation into a collective, through the transmission of shared truths, scripts, and cultural norms; and learning that sustains individuation, or separation from a collective, through the questioning of those same truths, scripts, and norms. Incorporation involves transmission of requisite knowledge by authoritative experts to novices through instruction and emulation. Individuation involves the (re)production of knowledge through dialogues between learners who may or may not be experts—and may not even agree (Tsoukas, 2009; Vygotsky, 1962). This body of work has not just drawn a distinction between incorporation and individuation aims and their associated practices; it has also described these learning aims and practices as in contrast with each other—and noted the former's frequent dominance over the latter.

Ever since Dewey's (1938) work, scholars of experiential learning have portrayed themselves as an embattled minority, acknowledging that the learning methods they advocate are subversive, with their focus on questioning established truth, their elevation of personal experiences above authoritative sources, and their exhortation to make up one's mind rather than having it made by a group (Mezirow, 1991; Raelin, 2007). More recently, scholars have begun to explore the possibility of balancing incorporation and individuation in work and educational institutions. Cable, Gino, and Staats (2013), for example, found that socialization that made room for authenticity increased retention, job attitudes, work quality, and productivity. However, attempts to give equal consideration to incorporation and individuation, they noted, are still rare. That balancing act often rests on the shoulders of midlevel socialization agents, who reconcile the organization's demand for assimilation and members' desire for individuality (Ramarajan & Reid, 2020); or of "tempered radicals" whose personal identities put them at odds with the organizations they are committed to (Meyerson & Scully, 1995). However, the intent to balance the two is becoming more common among the top leaders of organizations engaged in the so-called "war for talent" (Chambers, Foulon, Handfield-Jones, Hankin, & Michaels, 1998).

In a study of one such organization, Petriglieri et al. (2018) captured the duality of learning aims and practices reviewed above with the labels of instrumental and humanistic ideologies. Organizations that aspire to attract "talent"—that is, knowledge workers engaged in mobile and uncertain careers—they argued, need to embrace both ideologies, contradictory as they might be. Only those firms that manage to do so credibly—if not comfortably—become identity workspaces that help members develop "portable selves" suited to more organizations than their current one. In industries characterized by high mobility, employees flock to these organizations because they bolster future employability (Bidwell, Won, Barbulescu, & Mollick, 2015). Scholars have focused on what those organizations offer to members, however, more than on the work that leaders must do to sustain that offering. That work involves treating the duality of learning as a paradox.

Scholarship on the pervasiveness of paradoxes in organizations is burgeoning (for a review, see Schad, Lewis, Raisch, & Smith, 2016). While generating ambivalence and conflict (Battilana & Dorado, 2010; Vince & Broussine, 1996), this literature has shown, paradoxes can sustain an organization's uniqueness in the long run (Ashforth & Reingen, 2014; Besharov, 2014; Smith & Lewis, 2011). The duality of instrumental and humanistic ideologies can be characterized as one because it involves a "persistent contradiction between interdependent elements" (Schad, et al., 2016: 10). Schad, et al. (2016) noted that research on learning paradoxes (Lewis, 2000) has focused on their strategic facet, investigating how leaders (Smith, 2014) and members (Smets, Jarzabkowski, Burke, & Spee, 2015) balance exploration and exploitation (March, 1991)—the "pursuit of new knowledge" and "the use and development of things already known" (Levinthal & March, 1993: 105)—to adapt to their environment. Less work has examined the existential facet of learning paradoxes, which is related to how organizations mold and free up members' selves. We know that many leaders, like most members, treat dualities as conflicts to resolve, while some can hold both sides of dualities (Smith & Besharov, 2019) that make "competing claims on their selfhood" (Voronov & Yorks, 2015: 568; see also Creed, DeJordy, & Lok, 2010). However, Besharov (2014) noted, we do not know how leaders learn to do so (see also Miron-Spektor, et al., 2018; Voronov & Yorks, 2015). To answer that question, we turned to L&D executives.

METHODS

We chose to study L&D executives because they are exemplars of marginal leaders whose function,

as noted above, exposes them to a defining duality. A survey of 573 companies in 32 countries found that 73% had L&D strategies, and in over 50% the responsibility to craft and implement such strategies fell upon a distinct senior executive (Grebow, 2014). Even when they do not sit on the top management team, these executives command sizeable resources, judging from corporate investments in L&D. In 2017, worldwide spending reached 360 billion U.S. dollars (Training Industry, 2017). At the same time, their role is often vaguely defined and remains at the periphery of corporate leadership circles (Pillans, 2017).

Consider its history. Jack Welch himself, the patron of learning as a replacement for corporate loyalty, created the role. He hired former Academy of Management President Steve Kerr to oversee General Electric's (GE's) learning initiatives in 1994 (Greiner, 2002). Kerr's title was to be chief education officer. However, at the last minute, Welch objected. There could be only one CEO at GE, he argued, so the title of CLO was born (Martirossian, 2018). Since that origin, many more firms have welcomed—and rebuffed—formal leaders of learning. Years after Welch appointed Kerr at GE as the first CLO, for example, another celebrity CEO, Steve Jobs, hired Yale School of Management Dean Joel Podolny to lead learning at Apple. In two symbolic moves, Jobs gave him an office between his own and that of then-COO Tim Cook (Guynn, 2011), and restricted Podolny and his team from speaking in public about their work (Chen, 2014).

Such anecdotes capture a tentative corporate turn toward learning, whose leaders are often seen, not always heard, and placed somewhere between vision and execution. It falls upon them to steer through the ambiguity of their leadership role, through a duality whose roots dig into centuries-old ideologies of learning, and to find simplicity on the other side of all that complexity—to paraphrase a quote by U.S. Supreme Court Justice Oliver Wendell Holmes (Peterson, 2012). L&D executives must articulate the purpose and structure the practice of learning for their organizations—and doing that work, in the end, defines them as leaders in the organization. This population, then, represents a purposeful setting (Patton, 1990) to address the research question of how marginal leaders navigate defining dualities in organizations. We employed inductive, qualitative methods for our study (Glaser & Strauss, 1967), complementing them with a systems psychodynamic approach to theorizing (Berg & Smith, 1985; French & Vince, 1999; Petriglieri & Petriglieri, 2020).

Sample and Data Collection

Our sample consists of 69 senior L&D executives in 69 multinational companies. We recruited informants from different industries and countries to examine their work in a variety of contexts (Patton, 1990). Industries represented in our sample include professional services, finance, and insurance (22 companies); chemical and precision manufacturing (14); information technology and telecommunications (10); retailing and fast-moving consumer goods (8); traditional and renewable energy (7); biotech and pharmaceuticals (5); construction and transportation (3). Given the variety of titles and positions that L&D executives have, we phrased our request broadly, asking to interview "the person in charge of learning and development" at the company. A total of 14 of the executives we gained access to, with that request, reported directly to the CEO; 40 reported to the Chief Human Resources Officer (CHRO), and the remaining 15 were heads of learning for a large region or unit. Informants were based in 19 countries; 24 were men, 45 were women; and 59 had worked in more than one organization.

We collected data through individual semistructured interviews, recorded with permission and professionally transcribed (in this paper, we identify informants with progressive numbers). During the first part of data collection and analysis, which proceeded in parallel, we also invited interviewed informants to group discussions that served as a source of member check (Lincoln & Guba, 1985). At first, our interviews included broad questions about the informant's background, career journey, and activities. As the study progressed, we began to focus on their experiences of marginality as leaders and on the views of learning that oriented their work (Spradley, 1979). We no longer revised the protocol (available in Appendix A) after 55 interviews, and no new themes emerged after 64, suggesting that we had reached theoretical saturation (Glaser & Strauss, 1967). After five more informants confirmed our impression, we stopped collecting data.

Data Analysis

We employed inductive theory-building techniques (Glaser & Strauss, 1967; Strauss & Corbin, 1998), collecting and analyzing data in parallel over two years. We iterated between two analytic stages—or more accurately, analytic modes. In the first, more descriptive mode, we worked toward a systematic categorization of each informant's reported experiences. In the second, more theoretical mode, we

worked to infer a theoretical process model that explicated patterns and flows of experiences in our sample as a whole.

In the first mode of data analysis, we met after reading one or two interviews, discussed insights from each, and worked toward a coding scheme. First separately and then together, we coded each interview line by line, assigning one or more codes to a section of text that provided evidence for a phenomenon of interest. When possible, we used in-vivo codes (Strauss & Corbin, 1998) based on participants' language, such as "confused" or "gatekeeper." On occasion, we resorted to descriptive codes based on our descriptions of a portion of text. When asked about their background, for example, some informants emphasized their work history, and others their educational qualifications. As our analysis progressed, we deployed axial codes to capture broader themes (Locke, 2001). A preliminary coding scheme emerged after 20 hours of conversations about 12 interviews. We used the scheme to code the whole sample, meeting regularly to compare codes, discuss discrepancies, and refine the scheme.

In the second mode of data analysis, we strove to condense our axial codes into a set of theoretical categories. Through a process of constant comparison, we looked for similarities and variations between patterns in the data (Strauss & Corbin, 1998). For example, we noticed systematic differences between informants' relations to the L&D function, to their company's established leaders, and to its employees as learners—which we had identified as axial codes. When we grouped transcripts that showed similar combinations of those codes, we realized that they also reported similar views about whether learning should be primarily in the service of the company, of its members, or both. These comparisons revealed three distinct identities that positioned our informants as leaders in their organization and informed their learning strategies for it. We grouped informants according to the leader identities that transpired in their interviews. In three cases we remained uncertain, and we resolved our differences in conversations. We then sought to understand what the three groups had in common, and what was distinct about each.

The trajectories toward all three identities seemed to bridge personal and organizational, existential and strategic. "I've seen myself more as a leader," one informant told us, "because of the experience [of heading L&D]. I've challenged myself in this role. I've had to. I was nothing in terms of L&D, so I had to create everything, including programs, structure, and framework" (59). Being nothing, in this fascinating turn of phrase, makes creating everything necessary and possible, and that act of creation in turn seems to put a leader where nothing once was, in the organization and in the self. These emerging observations led us to use a systems psychodynamic approach (French & Vince, 1999; Petriglieri & Petriglieri, 2020) to gain deeper insight into our data.

Systems Psychodynamics

The term systems psychodynamics refers both to an interpretive perspective for theorizing from field data and to a body of theories and concepts about organizing, organizations, and the organized (for a review, see Petriglieri & Petriglieri, 2020). Both as a lens and as a set of theories, a systems psychodynamic approach highlights the multiplicity of motives that lead people, more or less consciously, to join, shape, and sustain organizations. Its classic domains of inquiry are "irrational" organizational features that seem impervious to change (e.g., Hirschhorn, 1988) and the enduring appeal of "irrational" leaders (e.g., Kernberg, 1979)—where irrational is understood as poorly suited to achieve the organization's stated task and meet the demands of its environment. In these circumstances, systems psychodynamic scholars have contended, the overt function of organizing comes into conflict with a covert function that has to do with protecting members from disturbing affect and disagreeable ideas (Menzies, 1960). People lead and organize, in other words, not just to get things done but also to feel, think, and act in familiar ways—and not in others (Shapiro & Carr, 1991). Or, more precisely, to be a certain self and not a conflicted one (Petriglieri & Stein, 2012).

A systems psychodynamic perspective builds on the psychoanalytic assumption that human behavior is often motivated by efforts to keep distress and conflict at bay (Gabriel, 1999). However, it departs from the traditional psychoanalytic focus on the management of intrapsychic conflicts rooted in early identifications. It focuses instead on how the emotions that the work elicits, and the politics that surround it, influence the way people organize (Petriglieri, 2020). Given its interest in how members' identities and emotions shape and unsettle organizations' structures and norms, and vice versa, (Vince, 2019), this perspective is well-suited to the study of processes that cross levels of analysis (Pratt & Crosina, 2016), and to answer calls to humanize the study of organizations and institutions, investigating how "people rely on institutions to fashion their sense of

self, and institutions require people to make them phenomenologically real and permanent" (Voronov & Weber, 2020: 881). In addition, given its focus on how intrapsychic conflicts become systemic ones, and vice versa (Ashforth & Reingen, 2014; Padavic, Ely, & Reid, 2019; Petriglieri, et al., 2018), this perspective is particularly suited to study of the management of dualities (Jarrett & Vince, 2017).

Methodologically, a systems psychodynamic analysis complements a classic inductive one. If the latter helps scholars theorize about patterns in the text of reported experiences, the former helps to theorize about the (emotional) subtext and (political) context of those experiences. While collecting data, for example, we were struck by the emotion that many informants displayed when answering a straightforward opening question about their background. People interpreted the question differently, as referring either to their education or to their work history. In addition, while everyone had agreed freely, and often enthusiastically, to take part in our study, as soon as we posed that question many became tentative, apologetic, or even defiant, such as in the case of this informant:

> Interviewer: Would you tell me a bit about your background?
>
> 14: I've been with the company for about seven years, and for the first five I was responsible for graduate programs for engineers and scientists. … I have a degree in English language and literature. I also studied journalism and worked as a journalist.
>
> Int: What type of training have you received for your current role?
>
> 14: For this specific role?
>
> Int: Yes.
>
> 14 [laughing]: None! Only a bit of coaching.
>
> Int: Would you mind telling me how you transitioned from your prior work into this role?
>
> 14: I thought that this was more about the learning and development function and structures, and talent management, and so on, rather than my background.
>
> Int: I am just interested to learn if there's any literature you reference, or any training and development that people like you do, for that role. I ask this question to everybody.
>
> 14: Mmmh, ok. What has been really useful is being part of the network of other [industry] companies, a training alliance for [industry] companies, there is a lot of sharing amongst members. It's a really good way of learning what you are.

The approach to data analysis that systems psychodynamic theorizing requires (Berg & Smith, 1985) involves attending to associations in the text and in the field (Petriglieri, Ashford, & Wrzesniewski, 2019). In the exchange above, the informant highlights her work experience before her studies, gets unsettled when asked about her transition from journalism to L&D, and then collects herself when describing a network that helped her "learn what you are." The fragment of dialogue contains two kinds of associations. One is an association in the text, between ideas and emotions—that is, what themes seems to heat up and cool down the emotional intensity of the conversation. Here, respectively, a professional transition and a valuable network. The other is an association in the field, between the informant and others—that is, a collective that helped her clarify her identity as a leader of learning, over time, as well as regain equanimity in the moment.

Making inferences from—and about—such associations demands rigorous self-scrutiny, as researchers must discard inferences based on their experience more than on the data (Berg & Smith, 1985). For example, we noticed that while most informants articulated firm views of their place in the organization, some seemed to remain marginal. We thought, at first, that their position might be a product of inexperience, a matter of time until they settled on firmer ground or left their company. The data, however, suggested that those "marginals" were among the most experienced in the role, which led us to discard our first hunch and recognize that their unease was related to their resolve to hold both sides of the duality of learning, rather than splitting off one pole.

Besides using a systems psychodynamic lens to theorize about why marginal leaders took different trajectories, we also used concepts from the systems psychodynamic toolbox. We inferred that the mechanism of splitting conflicting elements into clearer poles and projecting the undesired pole into a different group (Klein, 1959) was involved in two of the three trajectories, while the third one involved integration. Most importantly, as we refined our understanding of the marginal leaders' trajectories, we became sensitized by the concept of *relatedness* (Bion, 1961). In contrast with a relationship, which involves an actual counterpart, relatedness refers to an internalized party. The concept builds on the idea that people internalize images of significant others, groups, or organizations, and then identify in relation to those images (Armstrong, 1997). If they regard the organization, say, as a prison, leaders and members might relate to it *as if* it were one, crafting

identities as wardens and prisoners in keeping with it (leadership, seen through the lens of relatedness, is the ability to conjure an organization that resembles the one in our minds). The concept sensitized us to the significance of emerging leaders' relatedness to established leaders in their organization, to other members, and to the L&D function. The evolution of such relatedness was a key element of their trajectory through the duality of learning and toward a leader identity.

FINDINGS

Our iterations with the data, with each other, and with the literatures on leader identity and learning paradoxes culminated in the development of a model of marginal leaders' conception of learning in organizations. In the sections that follow, we first present the duality of learning that provided the background for the dilemmas that informants faced as marginal leaders. We then describe the three trajectories that informants took to navigate that defining duality and craft leader identities that helped give meaning and direction to their leadership. We document the process of conceiving learning through each trajectory, by finding a place in relation to the organization, taking a stance on learning, and organizing learning spaces. We also examine the systems psychodynamic underpinning each trajectory to elucidate how each conception of learning helped informants reduce ambiguity and settle into identities as leaders in their organizations. We illustrate each section with informants' quotes, presenting additional evidence in data tables.

The Dual Function of Learning

In line with extant literature, our data were replete with conflicting, yet potentially complementary, views on the purpose and practice of learning. While everyone agreed, unsurprisingly, that learning mattered, their explanations of why it mattered, what kind of learning mattered, and who should ultimately benefit from it, diverged systematically. Moreover, while most informants oversaw similar portfolios of formal and informal learning initiatives, we gathered contrasting accounts of the design and deployment of those initiatives. These divergent views revealed a duality of learning operating across organizations. While not all informants, as we will see, imported the duality into their organization, it still informed the views and work that would define them as leaders. On one pole stood accounts of the instrumental function of learning. On the other, accounts of its humanistic function (see also Table 1).

The instrumental purpose of learning. According to the instrumental view, *learning was a tool* for people to perform in their role and advance in their careers, and for organizations to attract talent and prosper. The language of utility and relevance, to career moves and business challenges, prevailed in instrumental accounts. One informant was adamant that learning initiatives needed to be "linked to specific moments in [employees'] careers. For example, if you become an executive, before you become an executive, you get prep. You have a preparation phase" (47). Another argued that "pay is important, title is important, but they are not the only things." Respondents highlighted that talent want to learn. "Meaningful development courses are highly valued. [Talent] will be more likely to stay" (59).

Learning, in this view, is *an instrument to turn talent into performance*. "Obviously, the ultimate outcome [of learning,]" one informant noted, stating the obvious within an instrumental worldview, "is that something changes in the job somebody is doing. It needs to lead to a concrete business result. It can be direct, financial, or it can be that somebody, after they went through a 360, changes consistently and sustainably behavior" (17). Learning should anchor people to their roles, and to the organization, helping them to perform their duties competently, and to comport themselves according to the organization's culture. Then, one informant concluded, the "organization satisfies its need for leaders [and] these people satisfy their career aspirations" (56).

One executive said that a central part of her job was "making sure that whatever is offered is really relevant to a [business] need" (51). It might not be coincidental that this quote described the informants' work as providing some assurance. This is what learning is meant to do, according to this view—securing people in the organization, securing organization, and securing the organization. The *organization should be the primary beneficiary*, in short, and people's learning should be subordinated to the needs of the business. "You're creating a practice," another informant explained, "that allows your people to maximize their potential while they're bringing value to the organization, they're bringing dollars and profit. This is perfect" (60).

The instrumental practice of learning. Practices informed by an instrumental view of learning, our analysis revealed, were designed and deployed to foster *incorporation.* A conception of learning as the acquisition of requisite knowledge and skills from

TABLE 1
The Duality of Learning: Coding Scheme and Illustrative Data

Theoretical Categories	Axial Codes	Statements About …	Illustrative Quotations
Instrumental purpose of learning	Learning as a tool	… learning as a duty to keep people, and the organization, performing; importance of utility and relevance to career and business challenges	"I think it's an obligation for senior managers to pass on their experience, as well as an obligation for people to reflect on themselves and to improve continuously." (41)
			"People need to be trained and prepared for their current job, and every year we compare their performance and the competencies required to do the job. … we also look at the long term and we invest in L&D to prepare people for future responsibilities. Sometimes there are company needs which arise." (46)
	Learning as a means to turn talent into performance	… learning as a way to help people fit current and prospective roles; using learning for retaining talent	"It's very important that learning opportunities are related to the organization's challenges, related to the role, that they stretch a person. The bigger learning opportunities but also small ones." (13)
			"To be specific, the [learning initiative] has three objectives. One is to teach them something new to grow their businesses. … The second would be to connect them more to [company] so we retain them and engage them. … And the third is to get them networking between themselves, because we know that's crucial." (3)
	Organization as primary beneficiary of learning	… the needs of organizations as drivers of learning; individuals' learning must be in the service of the organization	"My guiding philosophy, I would say, it's about the business first. It has to be about helping the business be successful by helping individuals be successful." (53)
			"[Learning] needs to be more than just inspirational. It needs to be anchored into, 'What can we use this for in [Company]?' … We're very open to our employees, that you might be a high performer and have potential to jump two levels to another leadership position, and we will develop you. But it's not necessary to accelerate your development, if we don't have a business-critical need." (11)
Instrumental practice of learning	Focus on incorporation through contextualized & standardized practices	… emphasis on acquisition of requisite skills and behavioral change; importance of models; customization to company; rolling-out and consolidating strategy	"We want to change the culture in terms of enhancing performance and feedback, so we designed a global program which was implemented from the top, for the top 400. They said, "Every manager all across the globe should go through this!" So around 15,000 people just went through this program in one year." (23)
			"The approach from the company is to standardize and to find, let's say, the right balance between a good level of standardization ensuring that we cover local needs. If we run a leadership program in Brazil, which is a big and important country, the key themes are supposed to be similar than in China." (17)
			"We ask the countries to understand the model and we try to have them deliver the model and the different elements. So far for me it has been a success that this type of programs is being delivered in all the countries and they are finding them suitable." (38)
	Assessment as a key element of the learning process	...learning related to gaps between skills and standards; activities	"The kind of people who are successful have a particular brain pattern and we're getting better at assessing that, apparently." (3)

TABLE 1
(Continued)

Theoretical Categories	Axial Codes	Statements About …	Illustrative Quotations
		organized by layers or roles; assessment for learners and initiatives	"Yes, we want leaders to develop, but of course we need to give those leaders the tools, the competence, and the attitude to do that. The succession planning process has been an eye-opener in terms of the state of our talent and the gaps that we need to close." (11) "We have a new leadership development curriculum that has two parts: mandatory and elective programs. We're rolling it out, certain programs at each level. If there is a specific training need not covered in the curriculum, there is an opportunity for the leader to look outside. But the curriculum is quite extensive, and it covers, obviously, leadership behaviors that we are promoting." (14) "We have a questionnaire we send out to participants or the manager, and we measure ROI [Return on Investment] and learning effectiveness, basically. It's quite detailed. These are the two key KPIs [Key Performance Indicators] that we use." (43)
Humanistic purpose of learning	Learning as a right	… learning as a commitment to help people grow and organizations evolve; somewhat independent of business needs	"[The founders] always believed in education. In essence, in this organization, there is a deep commitment to learning. It is based on some of the family values and stories of one of the great-grandfathers who always said that it is important to invest in education." (45) "Development is complex and people take things on board in different ways. You can't necessarily line everything up to a return." (48)
	Learning as a weapon against oppression	… offering people opportunities to realize their potential; learning as a way to take distance from current circumstances; emphasis on awareness and breaking habits; helping people be free and employable	"My personal philosophy is helping people to be the best that they can be. I've spent my life doing that. Everybody's got something brilliant about them. Everybody's amazing in their own way. In my work, a lot of time is spent just helping people understand what that is. So many people try and be something that they think everyone is telling them to be or fit into a job that they don't really like. I do a lot of helping people understand themselves and bring that forward. Stop trying to improve what you're weak at and do more of what you're best at. Our guiding philosophy is that at [Company], you can be anything you want to be. You can get wherever you want to get." (50) "As a company, we can't invest anymore in young graduates with the idea of what it will bring in 20, 30 years. We invest in that person to make sure that he or she continues to grow. It has to do with making sure that they stay employable in or outside the company." (42)
	Individual as primary beneficiary of learning	… individuals' needs and aspirations as drivers of learning; organizations' learning must support the individual	"Business performance, in all honesty, is a second priority for me. The higher priority is that [the managers we work with] can make healthier and happier workplaces, then that will help others as well, and the secondary gain will be better business performance." (61) "Evolving does not mean that everyone will be a senior manager. … Not everyone will become a CEO. That's not the goal." (30)

TABLE 1
(Continued)

Theoretical Categories	Axial Codes	Statements About …	Illustrative Quotations
Humanistic practice of learning	Focus on individuation through personalized activities	… importance of experience; spaces to experiment; learning for the whole person; not just courses	"We are moving away from offering training and getting more into what I would call L&D experiences, going beyond just knowledge and skills, and also beyond formal classroom sessions." (42) "I believe in experience, not much in the notion of competencies. Competencies is a buzzword, in a lot of cases it does not mean much. I'm reluctant to do development programs that are not experience-based." (51) "I don't like programs that are too tools- or technical-oriented. I think management is first to take a perspective on yourself and on your role, then of course there are a few techniques you need to acquire. But the first thing is to have a view on yourself and the way you are seen and the way you act." (30)
	Assessment as a hindrance to the learning process	… bringing more people, ideally everyone, into learning processes; helping people develop relationships; separating learning from assessment	"Some of us who go into this work have a fundamental belief that we're here to help everybody. I joined this field because I felt like it was a civic responsibility." (55) "At an individual level, people come back from programs open to different ways of working, and they use some of the tools that they have learned. I have seen that in action. Organizationally, impact has been more around projects where you have a number of people who participate in the same program, bringing other people into ways of working and thought processes and a general approach." (2) "Our MD [Managing Director] is not too worried about the evaluation of [learning] because in his words, 'It's the right thing to do and it will make a difference to people. We just need to have faith in that.' … Some of this stuff is people developing as people." (48)

authoritative sources underpinned the design of these contextualized and standardized learning practices, such as training programs and workshops rolled out across the whole organization. One informant, for example, described a concerted effort to acculturate employees into a common standard.

> After we rolled out the competency framework, mainly we need to see where does [Company] stand, and how can we make sure we upskill people to the main standard in [Company]? We have started to customize training in house, and train people to make sure everyone is talking the same language, at the same level. (9)

The deployment of such initiatives usually replicated the organization's structure and targeted people who transitioned between its layers. Hence, the initiatives reinforced that structure while helping people move through it. One informant described how learning eased such transitions:

> When you're promoted you get meetings with your manager and your HR [human resources] partner, to ensure that you know what support you can get, and which things are changing as you move into a leadership role. … What you need to start doing and what you need to stop doing. And we have programs to ensure that the transition goes as smoothly as possible. (11)

Formal assessment was often a component of instrumental practices. One informant explained that she assessed learners and incentivized providers on the basis of assessment results.

> We try to agree with suppliers on a return-on-investment clause. We make that a financial bonus for them,

> and it's really specific. For instance, we have a program for leaders that just started to be in a managerial role, and there we do a 360[-degree feedback] at the beginning and at the end, and we specify that there has to be a certain progress in the 360. But we don't go as far as to link a training with business results. (41)

The use of individual assessments without an organizational equivalent was surprisingly common in instrumental accounts. We interpreted this as an expression that incorporation was the primary motive of those practices. An extreme version of this motive transpired in wishes to use technology to improve learning assessment and delivery. "Ideally we should have a chip in our brain that gives a clear understanding of what you need," one informant said, "without human intervention" (18).

The humanistic purpose of learning. According to a humanistic view, *learning is a right* to continue growing. Even if it is costly, and might help people go elsewhere, organizations should support that right. "It's part of the dangerous idea," one informant told us, hinting at the challenge that this view poses to the instrumental mainstream, "that if you want to be a 21st-century organization, then you really need to develop everybody" (65). Another expressed pride that investments in learning were somewhat insulated from the predicament of the business, saying:

> We have some great people in the company, and we are looking to create a learning environment where they develop to their maximum potential. Even though there's been a recession in [our industry], we've moved the average amount of training days [up.] (48)

Consistent with a humanistic view of learning, another informant noted that "each demand of the business doesn't necessarily mean that we should develop a training solution" (15).

It was "obvious," within this worldview, that what executives "say they need sometimes is not what they actually need" (64). Learning, then, is a *weapon against oppression* by the status quo. It should help people break free from the constraints of habits and expectations, and experiment with new ways of being, working, and organizing. According to one informant, this view was a rediscovery of holistic principles about what learning really meant. Positioning maturity as an ideal within a humanistic worldview, he observed that the most "mature" companies …

> … are working on going deeper with their talent or leaders, and actually everybody! Helping them, supporting them, not only their minds but their hearts and bodies. That is state of the art. Two thousand years ago, we were already there. It's weird, going back there. (27)

What this informant portrayed as "weird," and others cast as unconventional, was the idea of what learning is meant to do according to this view—freeing people up. *The individuals should be the primary beneficiary*, in short, and the business will benefit from it in turn. "We have a slogan we use: "You grow, we grow," said one informant, using "we" to emphasize a collective commitment:

> We have a strong belief that the better we can make our people grow, it will also make the company grow. We take responsibility as an organization to offer that opportunity to grow. We also expect people to take ownership of their own development. It goes both ways. (42)

The humanistic practice of learning. Learning initiatives informed by a humanistic view, our analysis revealed, were designed and deployed to foster *individuation.* A conception of learning as a series of experiences that bring about insight and change underpinned the design of personalized learning practices, such as workshops, coaching, or on-the-job initiatives, that made space for people to reflect and experiment, alone and in groups. "People love the power of choice, and so we have to expand the definition of learning," argued one informant, elaborating:

> There's so much research that says that most of what we learn is through experience, but we still heavily focus on classroom learning, or mobile, or online learning. Somebody is teaching you something, it's an old model. I'm trying to push learning through experience. The idea is that learning should not be something given to you one way. That experience can happen in a job, through a project. It can happen in a classroom. It can happen online. It can happen with your community. It can happen in all these different ways. (55)

Informants who described these initiatives often used the language of transformation. "We talk about transformation," one told us. "Transformation of self, transformation of company and transformation of the world" (5). They also emphasized involving people as a whole, and all the time, in helping them learn. "My dream strategy," another informant explained,

> is that [people] are in charge of their own learning, and we help them with resources. I don't care if [you take] a cooking class that has nothing to do with your job. If you come back to work motivated and you're doing a great job, who am I to say? (8)

Illustrating the link between purpose and practice, one informant explained the importance of supporting

learners' natural inclinations, rather than pushing them to learn something, as follows:

> I trust human beings to love learning. I trust that every individual intrinsically is always looking to grow. That's the first principle. It's important because if that's true, then I should not be pushing people towards learning. It should be more a pull strategy. (63)

Informants who favored humanistic practices saw *assessment as a hindrance* to putting learning in individuals' hands. If learning was to liberate, learners should be free. One explained that "the employee is responsible in the development dialogue; we say that he or she is in the driver's seat, unlike in performance reviews where the manager is in the driver's seat" (23).

Instrumental and humanistic views of the purpose and practice of learning stood in dialectic opposition—contrasting, yet, potentially, complementary. Our analysis suggests that whether L&D executives embraced only one pole of this defining duality or saw it as a paradox and attempted to bridge the two depended on how they tried to move from the margins of leadership.

The Challenge of Marginal Leadership

The executives we interviewed were well-aware of their seniority and responsibility. One told us that her role involved "working together with the top team to ensure that we follow through on our strategic initiatives" (11). Another stated, "I lead the L&D agenda for half a million people in 13 countries" (50). They also realized the trends that had propelled them up the corporate ranks. "CEOs are worried about attracting talent, retaining talent, and developing talent," one said, "as much as they are worried about the bottom line" (60). Despite their senior roles, however, our informants still felt, to varying degrees, somewhat marginal. Even if some were familiar with the senior corporate ranks, the remit to lead learning remained novel and ambiguous in those leadership circles. For heads of L&D, one informant noted, "a lot depends on the amount of trust that senior leaders have, either because of the competency you bring or because of the results that you've shown" (57). However, claiming competence or results was not easy in the absence of an established profession or a clear organizational mandate (see also Table 2).

Several executives mentioned *loose professional standards* for their roles. Many had no formal training in fields related to adult learning, organizational development, or human resources. "I came into the function completely through the backdoor" (20), said one, laughing nervously. Another told us that she had a "track record in two very big organizations." Nevertheless, she lamented, "what I don't have is a qualification that tells somebody that I am credible in this field. … You do an MBA, and it is obvious what you've done, it has real credibility. L&D does not have an equivalent" (4). Several informants, as we noted earlier, hesitated when asked about their background. "It's always a trick question," answered one, elaborating after a long pause:

> I guess I've been in HR for over 15 years. It's hard to believe. Half of my career in HR has been dedicated to organizational development and learning and development. … But, you know, I don't have a normal background. I studied French literature for a very long time, so I come from an academic background. I don't know how that translates into what I did, but if you look at what I've done my entire life, it's centered around learning. (26)

The feeling of being lost in translation that transpires from this quote, of looking for ways to account for—as well as make sense of—one's somewhat foreign self, recurred in our sample. Most people turned to colleagues for help yet noted that they had few opportunities to discuss their work with peers in other organizations. "Usually, we meet each other as potential employers or clients. This is rare!" said one at a gathering after we stated that our only aim was to share research insights. The remark captured a peculiar feature of these executives' leadership—they were visible yet did not get much attention. It was lonely, and it was unclear how close they really were to the top.

In comparison to established leaders such as the chief financial officer, whose function is well-understood and even encoded in law, informants told us that expectations for their roles were vague at best and they had to fight for resources in the form of budgets, time, and attention. We grouped these accounts within the category of *ambiguous organizational authorization.* For example, the person we cited above concluded that, despite her lack of training, she became an L&D executive because senior leaders at her company decided "to create this role called Learning and Development and to bring someone who has some idea of what that means" (26). Clarity was not the only thing that informants often lacked. Another was financial resources. "I firmly believe that development is most important for us to have sustainable leadership. But in the short term, it

TABLE 2
Marginal Leadership: Coding Scheme and Illustrative Data

Theoretical Categories	Axial Codes	Statements About …	Illustrative Quotations
Marginal leadership	Loose professional standards	… lack of clarity on what training was best for L&D role; not having education or training related to L&D; learning from books, practice, and others on the job; missing an L&D community	"I am a lawyer. I have to confess that. I've been trying to redeem myself for 20 years." (54) "I didn't go to training. It was lots of coaching and guidance from my peers mainly, and from my manager. I had support, guidance, and coaching on the job. I was lucky to have that opportunity." (9) "For this role? Not really, no, not some kind of formal training. I learn mostly from my network and also from suppliers." (41) "I have an external group of learning managers who I try to tap into, but right now I am really in a silo mentality at work. I am only thinking about our own management team where we are trying to implement with this new strategy." (8)
	Ambiguous organizational authorization	… not having a clearly specified mandate; having insufficient or fluctuating budget; struggling to get people's attention and time; lack of focus on the long term	"[When I joined,] the head of HR said, 'Look, I can support you, but I know nothing in this area. You have a blank slate.'" (52) "In a utopian situation, where you have budgets, you have the support of line managers—in my case usually the MD or CEO—and you have things that need to be done, it's great. In a situation where you would like to have those things but there is no budget or there is no support, it can be a very difficult place to be." (48) "The challenging aspect is the tight resources. You will not be hearing this for the first time, and for sure not for the last time. Tight resources means time, financials, and people." (17) "It's very, very difficult to enforce or maintain a long-term vision among the workforce. I'm afraid that the short-term vision is prevalent right now, and it's very difficult to assure enough investment in L&D because the short term prevails." (34)

is the area that is pinched most" (1), one said. Another reported that

> you do a lot of selling. There's so much competition for resources. You're constantly having to say, 'This is why this intervention is right, this is the case for it, this is what it's going to cost, and this is the ROI [Return on Investment] that you're going to get. (55)

Informants also struggled to get attention from other business leaders and employees. One remarked, "I regularly come up against, 'yeah [learning] is good and nice to do, but we need to run the shops'" (4). Another explained that it was not just people's time that was hard to secure, given the pace of business—it was their time horizon that was hard to shift.

> Executive learning requires time. Taking people somewhere, getting their mind out of everyday business, getting them to not only think about how to be efficient today, but to concentrate on mid-term and long-term issues. It's not easy to catch people's attention and get them to think about the future rather than about the complexities of today. (32)

Loose professionalism and ambiguous authorization provided few anchors for informants' identity as leaders, while the duality of learning gave them conflicting prescriptions for defining it. Hearing about our sample, one informant ventured an accurate guess of what we did encounter.

> You're probably seeing a spectrum of sophistication, levels, [seats] at the table, who they report to, how people view the L&D organization. I think a lot of that has to do with articulation and/or interpretation of the value of the learning function. (53)

We take the use of "and/or" in the quote to be significant. Even if they could not always articulate it, leaders of learning had to enact a consistent interpretation of their function. "The context I work in is full of ambiguity," one informant explained. "It is easy to say, she's the one for learning. But what does it mean?" (62). It meant having little to hang on to and a lot to deal with.

The Process: Conceiving Learning to Make (Oneself) a Leader

There was risk as well as opportunity in the predicament of the marginal leaders we studied. "It's easy to flail, it's easy to get lost, and it's really easy to play it very, very safe," (61) one informant noted. "You deal with a lot of different emotions" (59), added another, while a third said that one needed "a lot of patience, the ability to handle a lot of ambiguity and uncertainty. [The role] demands a lot of influencing without authority" (57). Another informant described learning "the job with the book in one hand and trying [things out] as we went along. The advantage is that there wasn't anyone to tell me that I couldn't do something, or that it was too difficult" (48).

The defining duality in their institutional environment and the need to define their function in their organization evoked two dilemmas for our informants as individuals. One was *existential*, and it involved answering the question "Why am I a leader?" As one informant put it, "you need to know your why, because the ego is going to take a lot of bruising" (65). The other dilemma was *strategic*, and its related question was "How do I organize learning?" Because L&D heads had "leadership without authority," another informant said, "you must see where the organization is heading and come up with initiatives which add value. Then you are given a seat" (56). The existential dilemma ignited the learning of leadership; the strategic one, the leadership of learning. Both had to be tackled to define one's leadership. Not everyone, however, tackled those questions in the same way. Our analysis revealed three coherent, yet different, ways to interpret and practice leadership. We labeled these leader identities Custodian, Challenger, and Connector.

Below, we describe the trajectories that led informants to each one of those identities, through a process of conceiving learning that involved *finding a place in relation* to their function, established leaders, and other members in their organization; *taking an ideological stance* on the duality of learning; and *organizing learning spaces*. To highlight the consistency of each trajectory, we illustrate them one at a time below, using the example of one informant who exemplifies it, and representative quotes from others (see also Table 3).

The custodian trajectory. Some leaders in our sample moved from the margins toward a position within the central circle of the organization's established leadership. Reaching that ground required casting oneself as a business steward, whose learning initiatives were instrumental to achieve the business strategy set from that inner circle. Custodians saw themselves as leaders because they were "aligned" with that strategy—and conceived learning as bringing others in line.

Custodians' relatedness to the function was an infatuation of sorts. They often described working in L&D as a result of personal interest or passion. Most minimized the value of professional qualifications. They claimed the expertise that, in their view, mattered most: Expertise in business. Robert,[1] the CLO of a global company, described the onset of his L&D work as "a coincidence." He insisted that his background in finance was "different" because he was "not an HR person by training." His roots lay elsewhere. "Probably I would have become an ordinary finance person, or a normal consultant, but I found my passion there" (44). He was a businessperson, he implied, whose passion made him extraordinary. The same passion for learning in the service of business informed his reading habits. "I read business magazines and draw my conclusions. But I don't read a lot of books and I don't read any scientific articles," he explained dismissing work that, in a recurrent custodian complaint, was "too academic"—a disqualifying kind of excess. Like Robert, other custodians argued that leaders of learning should take responsibility, if not credit, for business results. One laughed when we asked what challenges

[1] A pseudonym, like all other names given to research participants below.

TABLE 3
Leader Identities: Coding Scheme and Illustrative Data

Theoretical Categories	Custodians	Connectors	Challengers
Relatedness to function	*Passion for learning, business roots* "There are two ways to get into leadership development: you study psychology or you take it from the business side, [like me]. That is very beneficial for me when I talk to my clients, you can give a certain standing, you know about their problems, you used to work in the field. … When I started working for [Company,] I discovered my passion for learning and growing people." (43) "I didn't choose this work directly. Twelve years ago, I made a proposal to fundamentally reorganize how [company] approached learning for all members. [It was] a whitepaper that ended up at the highest level. They saw it as a good idea, decided to implement it, and they asked me to do it. I was a director in business and went to implement that new learning strategy worldwide." (47)	*Learning education & business expertise* "I have around 30 years of experience in this industry. I started with [Company], then moved to [Company], and for the last five years I'm working with [Company]. Prior to this role, I headed talent management in India. In terms of professional qualifications, I'm a pharmacist with an MBA in human resources. That's my background." (23) "I have a diploma in German. And I also have a doctorate in leadership education from an American University. Those are my academic credentials. And I have worked for 15 years now in several functions in human resources, primarily in executive education, human resources development, talent management, but also in the classical HR function." (27)	*Education and roots in learning* "I [have] two types of training. I'm completing studies in the field of human capital management. I'm almost done, all I've got left is my [master's] thesis. And I've done more practical training, so to speak, mostly around tools and methodologies to acquire certifications." (39) "I was trained by the Jesuits. I went to a Jesuit high school, I went to a Jesuit university, I did my MBA with the Jesuits. What I learned from the Jesuits is to say, 'Why?' … I was a heavy complainer about the way that we were used to do learning. The CHRO called me two years ago and said, 'Okay, now fix it.' That's how I got the job of CLO." (54)
Relatedness to established leaders	*Insiders, seeking support* "We are working on a few strategic projects. One is aligning the L&D focus globally within the company, and at the same time connecting L&D more to true business needs. We created a steering committee with real senior business people, including the CEO … this gives us a good platform to get their buy-in and support." (46) "Because we serve the top leaders and we're quite close to the board, we also need to make sure we are in alignment and we get their support. We cannot just continue and deliver programs but constantly need to check if it's still what the company needs." (68)	*Marginals, struggling to broaden* "The people around [the CEO] are very good, but they have absolutely no idea about how to put in place the strategy. The speed is not there. … The urgency isn't there. So that's what we're trying to accomplish with learning: we're integrating values and behaviors that have been around since 2005 but nobody's ever done anything about except for creating a poster!" (26) "For the leaders of the organization, historically, leadership development, management development, managing people, has not been a priority. It has been something done between six and six thirty. It has always been business first, clients first, deals first, very short-term thinking." (40)	*Outsiders, demanding redemption* "[The senior team] don't see themselves as the most powerful group of people in [company], they don't think 'We are intimidating people,' they don't understand themselves like this. Having someone [like me] going back to them and speaking his own truth was something they typically don't experience." (58) "I have a very different relationship with [senior leaders] than what they have with their other peers. They see me as someone invested in their success, but a straight shooter. … Mine is a contrarian view of what the goal of working with leaders can be all about. A friend of mine once coined a phrase for it, 'How can you be a challenger in an organization?' The value of that is you bring a different perspective, or a different insight into what's happening and why." (61)

TABLE 3
(Continued)

Theoretical Categories	Custodians	Connectors	Challengers
Relatedness to learners	*Gatekeeping (learners lack skills)* "We focus on [talents]. And what we do is manage the expectations and we inform them electronically that, 'We have received this request from you. We are sorry but we are unable at this moment, in your role, to offer to you this training solution.' When they choose something that is not suitable, we inform them." (38) "The idea in the future is to have a better understanding of these talents' development needs, and then we can push them through different development pipelines." (31)	*Hosting (learners lack inclusion)* "Everybody is made in the image of God and has something to bring into the world, only they can do that. The process of bringing that into the world is always a battle. ... [My work] is about creating communities where people can help each other be at their best and settle stuff." (65) "[My job] is supporting the organization to have different conversations. There's a lot of focus on that … supporting the organization to think about not hiding." (49)	*Liberating (learners lack power)* "We spend time looking at, individually, what do they need. My CEO is doing reviews with me. We look and talk about our talents. Where are they in their development? How can we do better? … We're trying to develop talent all day every day." (50) "[L&D] may shift from being a gatekeeper, so to speak, for certain development activities, to being more of a consultant or coach. Helping people to understand how they best learn. Then helping them, and their managers, leverage opportunities that are less formal." (39)
Ideological stance	*Instrumental (instruct & align)* "One of the challenges that we are facing is to implement our strategy across the board. One is developing a pipeline of high potentials who do not necessarily want to go the leadership direction but want to be professionals. And then I'm developing the organization to be more efficient toward the client." (13) "In our organization, we have to remind ourselves that we are working for the business and that we don't lose that focus so that we're only in our learning world." (68)	*Both (host and connect)* "Leaders have certain words that they don't like, and mine is training. That word is very limiting. When people think of training, it's a reaction to some problem, or trying to build skills and transfer knowledge quickly. As L&D experts, we're more connectors and curators. … How do you curate content and connect people in a way that they can learn from each other? … People still want to come together but not to have a hundred PowerPoint slides thrown at them. They want to come together to build community and learn from each other." (52) "Learning is a social process, to start, so the best way to learn is to bring people together. And to make them learn, the starting point is the experience that they bring. … [Our job is] to create space for that, especially within teams. The biggest connection in the organization is with the team that you are working with. If you manage to make that a strong team, that will have a big effect on the overall organization." (42)	*Humanistic (empower & support)* "What is important to us in terms of philosophy is that we are ready to invest in people's development. We trust people. We tell them that they are in charge of their development. That the company is keen to invest but it's their responsibility to do the best on it. We believe in ownership, in terms of development." (45) "We've learned a lot about opening people's minds and exploring and learning in a different way. I've got to convince the people who are representing the academy—let's say, in China, Korea, somewhere like that—who have a teacher–pupil-type dynamic in their minds, we've got to help them change." (50)
Learning spaces	*Incorporation (learning from models)* "The number one constant focus area is having leaders in the right place at the right time	*Inclusion (learning from others)* "Most of my job is to enable learning in the organization. … There's basically three ways people learn. People learn from	*Individuation (learning from moments)* "We encourage people to really think beyond what they are doing right now and what they should

TABLE 3
(Continued)

Theoretical Categories	Custodians	Connectors	Challengers
	with the right skills." (47) "Most learning & development departments actually do soft skills and basic training, but the training we do is really strategic and directly adds value to the company. Whatever the company invests in people development, it is repaid immediately through strategy projects, and by linking the achievements of the organization's strategy with people development agendas. …. Whomever is trying to waste the company's resources, we directly recover the cost. We are not scared of that. If, for example, somebody has signed up for a program and is not showing up or is not performing well, we make the person pay back the cost of the program. They sign a contract that they will commit to the program. Those who are not signing, we just exclude them from programs." (56)	structured programs, people learn from each other, and people learn from experiences. The ways you learn from others today is different, but you're still, at the base, one person who showed the other person how to make fire. It's just that today you have it on a smartphone." (53) "Once a year our chairman goes to [business school] for five days with members of the executive board and another 30 individuals invited from across levels, across very diverse backgrounds of employees. In those five days, the topics are not all from business management and the faculty are not all from the business school. They are from everywhere in the university. We have themes related to geography, economics, history, and so on." (57)	be doing next week, next month, next quarter. It is not development based on a problem, or a gap. [We ask,] what are we doing to deliver interventions to enhance as opposed than to solve problems?" (5) "The learning practices that I put in place are always voluntary. People don't want to come, they don't. We offer situations in which they can learn. We try to go outside the classroom to include learning moments every day. We have a program called 'What did you learn today?' We keep trying to help [people] understand where they are, be conscious about what you know and don't know, and then giving them possibilities to learn." (63)

she encountered in her role. "My challenges are the business's challenges!" (47) was her reply.

Custodian's relatedness to established leaders was a devoted one. They spoke of other senior executives as peers and sought their approval. "Everybody in my team has to understand finance," Robert explained, in order to speak the most familiar language among top executives. Conversely, he repeatedly distanced himself from HR. "It's probably very important that I didn't have an HR background," he remarked, "because I was able to speak [executives'] language. I wasn't talking the HR jargon with them." It was this affiliation, this "alignment," in custodians' idiom, that helped secure their place, as Robert suggested by claiming that "you need to talk directly with key businesspeople because they will protect you in tough times" (44). Another custodian concurred, drawing a link between alignment, identification, and centrality. Her team, she explained, was "very much aligned with the strategic agenda of our group. It has to keep being very aligned. … As long as it is very identified with the strategic agenda of the group, it's another pillar of the growth of the company" (33). Conversely, another told us that "a bad day" in his role was one "when you pitch something to the CEO and it doesn't get approved" (60). The process of bolstering one's influence with established leaders, for custodians, involved proving to be as devoted to the business as those leaders were. "You need to know board room behavior and communicate well with these people," one told us. "That's the way to earn trust. It's not networking. It's consistently delivering performance and adding value to the organization" (56).

Custodian's relatedness to employees was as gatekeepers of learning. "Nobody can nominate him or herself [for a learning initiative]," Robert explained. "They have to get nominated by their supervisor and the HR organization … you have to go through a process to get into a corporate learning program" (44). Custodians portrayed learners as lacking knowledge or skills and granted them access to learning initiatives when those lacks, in their assessment, could damage the learners' performance and career.

Learners were valuable resources who could perform better, if given the right learning at the right time. "We don't develop all talents identified. It needs to be relevant for the business," said one, casting learning unrelated to one's role as leisure. "It's not just whatever could be fun! All the development activities that our employees join are linked to gaining mastery in their roles" (11). Controlling access to learning bolstered custodians' influence. Their work could boost careers, one hinted, explaining that he had contributed to "success stories," in the company, "where someone starting from scratch has reached GM or CEO level" (60). In other words, they were not just affiliated with business leaders—they helped make them through their work.

Custodians' ideological stance was an embrace of the instrumental view of learning. They came to see the crux of their leadership as ensuring that learners were instructed and aligned to implement the organization's strategy. That, custodians believed, accomplished the purpose of learning—getting people to perform in their roles, advance in their careers, and serve the organization. His philosophy of learning, Robert concluded, was to "link it to business needs. Don't create a program because it is nice, because there's a fashion around it" (44). Another custodian explained that his philosophy was to "always keep in sight what you want to achieve for the organization and just deliver, continuously deliver to your commitments." Conversely, he explained switching to an impersonal "you" perhaps to take some distance from the prospect of sinking into irrelevance, when L&D "is not adding value to the organization, the business side will see you as irrelevant. Also, people will not see you adding value to their career journey" (56).

Custodians' learning spaces, consistent with their place and stance, were organized to promote incorporation. Robert, for example, reported favoring "the case-study methodology" for the initiatives he oversaw, as long as it involved cases on his company. He added that "a lot of these programs are assessment-based" (44). The combination of cases and assessment ensured that learners were made aware of their fit, or lack thereof. Another custodian described a learning initiative with the revealing name of "Central Management Training," and put it in context.

> We perceive Central Management Training as a platform for those who have to step into that [management] role for the first time, a platform for building this toolbox for leaders and managers and helping them to move on in their personal life with different diagnostic tools. … If I talk about levels, the International Management Training would be N-1 until maybe -2 to -3. And -3 would be the Central Management Training. (29)

It is worth noting the language of tools, typical of custodian's instrumental practices, and the centralization of learning and power. "Obviously you always include some kind of measurement," exclaimed one informant, hinting at the use of measurement as a form of control immediately after:

> I don't believe there is a true and clear measurement of ROI for this kind of [learning] initiative, because it is a return that you have in the medium and long term. But we are not ready to wait, so we introduce some measurement or some areas of control that are consistent with our context. (62)

The systems psychodynamics of custodian leadership. The custodian's conception of learning involved moving toward leadership and taking distance from learners. Their accounts cast learners as aspiring to, yet separate from, leadership of the business—a position that custodians might have been familiar with as marginal leaders. Their conception of learning, however, took them closer to the established leadership, granting access to it, even. How did that happen? Taking a systems psychodynamic perspective, we inferred that the move involved splitting the instrumental from the humanistic pole of the duality of learning. We interpreted the quotes presented above—with their claiming of strategic alignment, and othering of human resources and academic interests—as a manifestation of such splitting. For one more illustration, let us look closely at a passage where one custodian summarized what success looked like for him.

> [My approach is] to try to be simple, approachable, and next to the business, to understand their needs and to align our services and products to their needs, and not try to be something like a laboratory or a place of investigation, where we deliver things that nobody understands and nobody uses. For me, the best-case scenario is when I get a call from a business area of the organization, requesting our help in order to move their professionals, in order to make them change. That's the best-case scenario because that's when they understand the value of what we provide, they understand why we are assessing people, and they just want us to go and make an analysis and provide them with a proposal. That's the best-case scenario because we are close to them and they understand our planning. (38)

It is worth noting how, in this quote, a detailed articulation of successful "alignment" is associated

with the rejection of a humanistic view of learning as a "laboratory," a "place of investigation" that cannot be understood or used. In contrast, what follows immediately after such dismissal is the "best-case," or maybe best-self, scenario: an extended example of being understood and used.

After splitting, we inferred, custodians projected the instrumental view on leaders, with whom they aligned, and the humanistic one on learners, whom they sought to bring in line. "Every person keeps on learning and developing throughout their entire life," one explained, "and obviously we need to link it to the needs and challenges of the company" (46). That quote might well have described the custodians' own trajectory. Further evidence for this inference was seen in custodians' portraits of learners as lacking functional knowledge and skills; that is, what they had lacked as marginal leaders. The embrace of an instrumental view allowed them to dismiss that lack for themselves. "Look, I come from the school that a leader is a leader. Okay?" asserted one, who had told us earlier that he had no professional qualifications. "When you are a leader, even if you're not the subject matter expert, you're leading people to do tasks and to reach goals" (60).

The challenger trajectory. Some marginal leaders in our sample took a journey toward a position as valuable outsiders who challenged established leaders for the good of the organization. Reaching that ground required casting oneself as a caring antagonist, an advocate for learners in systems that were somewhat oppressive and needed change. Challengers saw themselves as leaders because they defied conformity and resistance—and conceived learning as freeing others up.

Challengers' relatedness to the function was a devoted one, often rooted in formal studies and membership in professional communities. Martha, head of talent and leadership development for a multinational, described being in her role as a choice and an achievement. After obtaining a master's degree in HR, she had worked in L&D at three blue chip companies, then moved to a fourth that offered her a chance to start the function from scratch. "I wanted to go somewhere where stuff wasn't sorted and I could be part of sorting it out," she explained. "People wanted to change, but they had absolutely no idea how to do it, where they wanted to go. … I liked that. I didn't want to be defined" (64). Ties to learning as a profession, rather than organizational definitions, grounded challengers. One, who had left academia to become a CLO, explained that he "thought that the skills and understanding that I have from an academic perspective could be useful to help one particular organization to accelerate its transformation" (63). Other challengers claimed expertise in transformation and change. "If you were to ask me what I am a specialist in," one told us, "I'd say culture and behavioral change" (50).

Challengers' relatedness to established leaders was antagonistic. One told us that his was "a challenger role, or a challenger spirit. … The value that you bring is a different perspective." As a result, he had found himself "in meetings with key executives, and they look at you and say, 'I have no idea where you're coming from'" (61). Such experiences did not deter challengers. They almost reveled in recounting them. Martha recalled that shortly after her appointment, she attended a social function at her company. "The average age of my peer group is about [a decade older] and they're all male. And this man introduced me to his wife, and he said, 'This young lady is going to teach me about leadership.'" She "wasn't surprised," she assured us, by that veiled hostility. It only motivated her to "find other people to be mouthpieces rather than me. A couple of people who get what you're saying. Also, some influential people who don't get it but are willing to stick their neck out" (64). Cultivating such allies to prove the value of their views was challengers' main influencing strategy. "I've had to learn that skill on the job, to develop alliances, to get a coalition of willing change agents" (61) the "challenger spirit" we cited above explained. Like custodians, challengers needed the attention of established leaders. However, they did not quite seek approval. They portrayed those leaders as monuments to the status quo—and sought their redemption.

Challengers' relatedness to employees was based on an intent to liberate with learning. They often portrayed learners as lacking power. One told us that he aimed to "put power to learn in the hands of the individual. I hope [L&D] becomes more democratic" (50). Another explained that he worked to "encourage everyone to be a leader" and dissuade them from waiting their turn or emulating others. "You should not look at somebody else but take control of your career … We encourage people to take intelligent risks" (5). If their way to influence established leaders was to seek allies to advocate for change, challengers' way to earn clout with learners was to promise freedom and support. Such active support was needed, Martha believed, because learners' disempowerment had deep roots. "From the very beginning," she lamented, "we're told that there are particular ways to do things and to learn

things. The way exam systems run, everything, tells you that there's a definite answer and if you haven't found it, you are wrong" (64).

Challengers' ideological stance was an embrace of the humanistic view of learning. They came to see the crux of leadership as empowering people to pursue their aspirations. Companies that did not welcome such humanistic bent, one explained, were not worth working for.

> I believe that education is the way to help people grow personally and live a better life. … Learning is a fabulous engine in life. It creates energy. That's why I'm absolutely favorable to everything that helps people change or grow in the organization. I've had offers to join other companies, but when I did my due diligence and saw what these organizations were really doing in terms of learning, development, et cetera, I was not convinced. (45)

Emancipation from constraints and from the past, challengers believed, was the purpose of learning. Martha gave a humanistic "measure" of her success. Desire for learning had come to transcend financial concerns.

> People want to continue to learn about something that makes them deeply uncomfortable and they struggle with, but also gives them huge energy. That's my measure [of success]. In an organization where every penny is counted closely, people are coming to me going, "We want more of the stuff that you're doing." That's the measure. (64)

Challengers' learning spaces were designed and deployed to promote individuation. They often emphasized the importance of learning from experience, rather than from frameworks imposed from above, and reminded us that learning did not just happen in formal programs. Having described himself as a "farmer of talent," one explained that this meant "influencing the organization in a direction where everyone feels responsible for learning and for growing, and we create the environment in which people can learn and thrive" (63). Martha recounted that a key choice she made early in her tenure was selecting a key external ally, an executive program provider. She set up a steering committee with other senior executives, and its work culminated in a choice between two providers. The first one made a pitch that would have delighted custodians. "They presented a mirror image to us, it was very [Company], it used [Company] language, it perfectly fitted the organization." The second provider "distorted it, so people were a little uncomfortable." What Martha said next reveals the link between her learning of leadership at the company and her leadership of learning.

> [My colleagues] went towards the first and they were challenged by the second one. That helped me to understand that the second was what we needed. … My job was to help them to understand the uncomfortable, and the different, in a way that made sense for them. (64)

While the last sentence overtly refers to the second provider, it is not too much of a stretch, given Martha's place and stance, to read it also as a statement about herself as a leader.

The systems psychodynamics of challenger leadership. The challengers' trajectory, we inferred, involved moving toward learners and taking distance from established leaders. Their accounts cast learners as needing enough power to defy the constraints of the business—a position that challengers might have been familiar with as marginal leaders. Their conception of learning, however, placed them outside those constraints, choosing what organization to work with, and ready to leave if it was not receptive to their efforts to empower others and disrupt the status quo. "I think of myself in the background," Martha concluded, "helping to guide others, rather than being the person at the front (64). When one of us quipped, at the end of the interview, that maybe she was a leader of unlearning, she laughed earthily and seemed to take that as a flattering portrait.

How did challengers get there? Taking a systems psychodynamic perspective, we infer that their trajectory also involved splitting the instrumental and humanistic poles of the duality of learning. We interpreted quotes like the ones presented above—with their claiming of transformation and personalization, and othering of management and economic rationalizations—as a manifestation of such split. In contrast to custodians, challengers embraced the humanistic pole and denigrated learning initiatives built on competency models. One cast those initiatives as futile attempts to "preempt the future" (5). Another compared them to "a fixed-priced-menu cafeteria. Very efficient to deliver breakfast, lunch, and dinner, but without choices. What we need is a 24/7 gastronomic experience" (54). Notice the switch from the custodian "we" to the challenger "you" as he went on to describe concerns for the return on learning investment as a kind of madness.

> I used to start a program and go, "This program is going to improve our productivity by four million pounds!" Trying to measure it, you just drive yourself mad. I don't do that, these days. … [It's all about]

> how you change your organization and how you empower them to do more things. (54)

Consistent with the operation of splitting, in the above quotes, instrumental learning practices are actively disowned and portrayed unfavorably as a way to affirm the sanity and value of one's own.

Like custodians, we inferred from our data, challengers projected the instrumental view on leaders and the humanistic one on learners. However, unlike custodians, they sought to redeem the former and free up the latter. "People might look like they are not really curious or interested or engaged with learning just because they have been repressed in the past" (63), said one. That quote might well have described the challengers' own circumstances as marginal leaders, but the embrace of a humanistic view placed them far from it. The same informant, in fact, noted that "a lot of organizations now have chief transformation officers and roles like that. But most of the transformation is learning. It's work a chief learning officer will also do" (63). In other words, he was anything but repressed. Unlike the learners he worked with, he got to lead transformation.

The connector trajectory. A third group of leaders in our sample took a journey toward a position of respected marginality, in between established leaders and learners. From that ground, these connectors could cast themselves as agents of inclusion, hosts of sorts. They saw themselves as leaders because they balanced competing priorities, and conceived learning as helping different parties come together and bring about change for individuals and the organization.

Connectors' relation to the function was usually described as a long-term career. Those who had professional qualifications narrated them as only one of a broader set of experiences. Peter, who held the title of chief talent officer at a professional services firm, told us that in roles like his one needed to both "understand the business world" and to "be a student of learning." The combination reflected his career. "I started in academia, as a university lecturer," he began, before listing his roles in six companies. "If you go into different industries, you are forced to learn the business. The movement makes you a better business leader" (19). Other connectors claimed both formal education and expertise in business. "My initial orientation," one said, "was towards clinical psychology. My dad's advice, absolutely spot-on, was that it was a saturated field, and I should consider exploring the occupational side" (49). Revealingly, this person narrated her career choice as a compromise between the advice of a practically minded parental figure and her personal inclinations. That pattern mirrored connectors' relatedness to the company's leadership.

Connectors' relatedness to established leaders was a struggle. Neither central nor outsiders, in these informants' accounts their presence brought balance to the upper corporate echelons. They reported tempering their colleagues' most instrumental views and helping them to see the human side. Peter drew on his personal experience to explain the roots of his efforts to raise the consciousness of his company's top leaders.

> I was there when Nelson Mandela was released [from prison]. I was in college. We were part of the uprisings to release him. And all of his wisdom and advice, his message to all of us—I say us, all South Africans, but specifically South Africans who were not White—was that, the leadership is from within and each of you is part of the struggle. Never give up. … The struggle today is about our planet. Unless we make a difference, we are going to destroy the planet. And I see the struggle between the millennial generation and the baby boomers. How committed [millennials] are to make sure that we are sustainable. This is resulting in organizations having to rethink their purpose and the employee value proposition. (19)

Mentions of struggle and balance recurred in connectors' tales. They sought neither to align with established leadership like custodians nor to redeem it like challengers. They aspired to broaden it. One informant described her balancing act in relation to her company's top team in a statement that wove together supporting delivery and advocating for a "people agenda."

> Trying to make sure that the people agenda is visible can be difficult. [My job] is making sure [that it] comes to mind. … It's about being a dog with a bone, really, talking quite passionately at every opportunity. But equally, there's a balance, you don't want people to think that you're only acting on your agenda. There is a piece of me that needs to deliver because this business values delivery, so that people then listen and value my opinion. (51)

Another hinted that the way connectors tried to influence established leaders, and broaden their views, was inviting collaboration. "It's always cocreation, with a collaborative spirit" (57).

Connectors' relatedness to employees focused on energizing what they saw as motivated, if sometimes distracted, learners. They also sought to balance those learners' interest and that of the organization. "I see my role as building capability in the organization to

be sustainable," said Peter, weaving together talk of upskilling and talk of learning for all. He continued:

> To be sustainable in the future, everyone has to take the time to learn and learn all the time. That is what I need to champion. You have to build the capability of every individual, with the mindset that it is in my interest to be upskilled and I need to do that every day. (19)

One connector explained that in their role "you are passionate about learning, you're passionate about development, but you want to see results in the short run" (57). What learners lacked and needed, in connectors' view, was inclusion into conversations that could affect their careers and companies' future. "You should utilize L&D, one argued, "to help you facilitate some of the conversations that, if you're in the details, you're not able to facilitate yourself" (51). Connectors' "pitch" to learners, the source of their influence and value, combined the access and empowerment promised by the other groups. They could bring learners into conversations, as one put it, that "hold up a mirror to what is working and what is not working. … Successes create change but always preserve harmony. Those two things are in permanent tension. Create the new but don't break anything old." (65).

Connectors' ideological stance encompassed instrumental and humanistic views of learning. Connectors saw the crux of their leadership as fostering inclusion, which would benefit both individuals and organization. "We are aiming to redefine the purpose of leadership and to enable a collaborative organization across cultures, across differences, a really inclusive workplace," said one. "The notion that business is driving learning is like 'last year's model.' It must be business is driving learning and learning is driving business" (28). Connectors viewed people as motivated to grow, and organizations as enablers and beneficiaries of that growth. "Our purpose is to inspire, to protect, and to help individuals achieve their full potential," Peter reiterated, blending the language of profits and purpose, of value and energy, as he continued:

> If you're really committed to the people who helped you achieve superior results, which we have done—one of the key measures is shareholder return or the share price, which has doubled over the last three years—you do have a commitment to give back to them. Energy comes from that purpose to help individuals achieve their full potential. (19)

Connectors' learning spaces were designed and deployed to balance individuation and incorporation. Their accounts of learning practices often included elements of the two. Peter, for example, told us proudly about an executive program he had initiated called "The Complete Leadership Program." While the title contrasts with the custodian informant's "central management training" that we cited above, he combined instrumental and humanistic elements in describing it.

> It is a program that looks at holistic leadership, not only from a strategic perspective and a customer perspective but also from a wellness and resilience perspective. All 1,500 of our top leaders have been to it, and then we cascaded it at every level in a different way. (19)

The ideal that connectors pursued was that individuals could be whole and the organization would improve if learning spaces fostered those inclusive conversations. "I sometimes use the metaphor of setting the table and inviting people to a meal," one told us. "You try and put the most nutritious food on the table, and you set the room. Some are going to come and eat, and some aren't" (56). The metaphor blended deliberate provision of space and content with freedom to use both. Peter offered an example of such practices of inclusion describing another of his initiatives. It was not a training program, but an effort to bring together different generations to learn from each other.

> We have created a group called [Name], which is basically millennials, and we are including them in our senior leadership meetings. They think this is their organization, they're going to be here longer than us, and they want a voice in decisions we make. So we're proactively including them. That's very different from other organizations I've worked in. (19)

The systems psychodynamics of connector leadership. The connectors' trajectory, we inferred, involved moving apart from, but close enough to, both established leaders and learners. Their accounts cast learners as needing inclusion to take part in a broadened, more diverse leadership of the business—a position that connectors might have been familiar with as marginal leaders. Their conception of learning, however, brought them to a different view of the margins, as a place where one could host exchanges that benefited the individuals involved and the organization. Taking a systems psychodynamic perspective, we infer that their move involved attempting to integrate—rather than splitting—the duality of learning by reframing it as a paradox.

We interpreted many of the quotes presented above—with their claims of struggling to take both

sides, and less othering than in the other two trajectories—as a manifestation of seeing humanistic and instrumental views as contradictory yet complementary, and trying to hold both. When it came to learning, one connector said "we tend to manage things as problems. But, actually, lots of things are paradoxes where there are two right answers or lots of right answers" (1). Mentions of balance recurred among these informants, and their accounts included the language of alignment and the language of freedom, sometimes in proximity as in the following case:

> It's about designing an offering that fits all regions, where we can find balance between global consistency and alignment and identity with enough degrees of freedom to adapt it to the local, regional or business needs, to really balance that. (42)

The struggle to balance and bridge center and periphery, instrumental and humanistic, was costly—but for connectors, it was worth it. Connectors might have also done some projecting on established leaders and learners, casting both as potential contributors to a collective that needed to be held together. However, they seemed more mindful of their participation in the struggle they invited others into, as Peter noted, tying his resolve to foster inclusion to his experience growing up "in South Africa during apartheid. I learned a lot about enabling people to achieve their full potential because I was one of those told that you wouldn't achieve that because of the color of your skin" (19). Once more, his conception of learning bound his personal journey to his work as a leader.

DISCUSSION

A Model of Marginal Leaders' Conception of Learning in Organizations

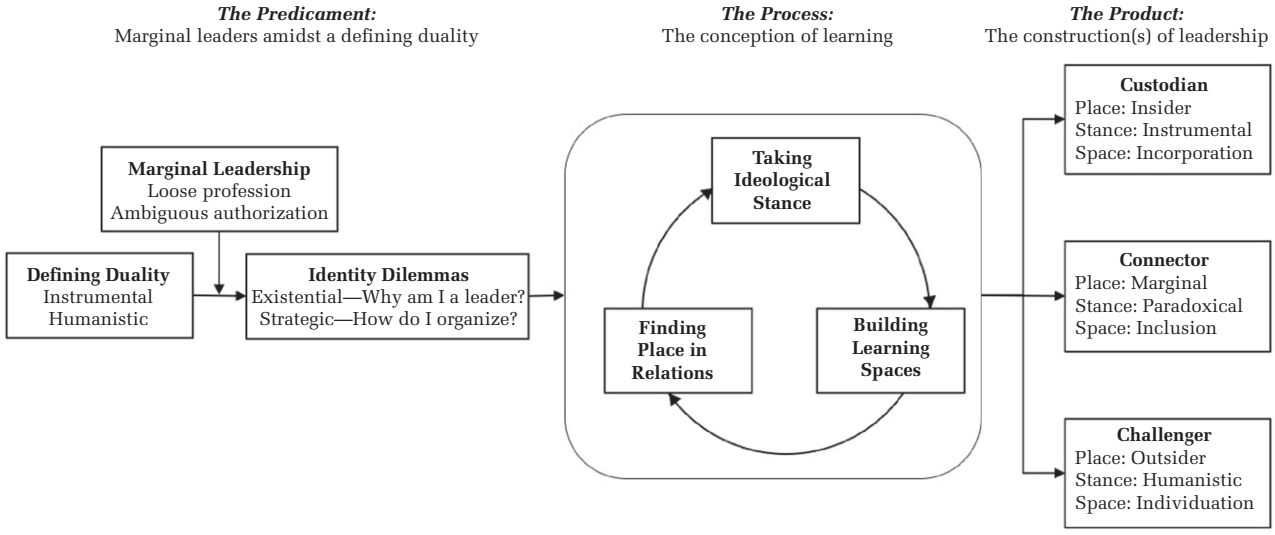
Our findings provide the ground for a theoretical model of marginal leaders' conception of learning in organizations, depicted in Figure 1. In keeping with the bifocal nature of systems psychodynamic theorizing, the model conjugates becoming and organizing. It bridges leaders' existential and strategic struggle to take up their roles as symbols and architects of an organization, and it posits that a process of conceiving learning underpins the construction of leader identities.

The model begins with a predicament that, we contend, all leaders face: a defining duality. Every leader's function encompasses instrumental and humanistic aims—that is, advancing the organization's goals and advocating for members' rights—as they approach organizing. For some, and perhaps most, leaders, that duality is not so salient because their role or organization might have well-established templates that they must fit to lead, and that prescribe a commitment to one pole of the duality or to honoring both poles. The duality, however, becomes salient and presents a conscious dilemma for marginal leaders, such as the corporate leaders of learning we studied. These leaders, who lack a clear professional or organizational template to orient them, must navigate conflicting prescriptions for interpreting their function and organizing accordingly.

That predicament ignites an existential and a strategic struggle associated with having to tackle two identity dilemmas. *Why am I a leader? How do I organize?* Answering both questions, we found, requires a learning process that gives meaning to a leader's identity and structures their organizing—put another way, a process that sorts and coheres one's personal interpretation of the meaning of leadership with one's organizational practice of leadership. The process unfolds in three steps: (a) finding a place in relation to the function, established leaders, and other organizational members; (b) taking a stance on one's function as an enterprise through which people are made to fit or freed up, and; (c) organizing spaces that facilitate incorporation or individuation. We theorize that the process of conceiving learning is recursive, not linear, since relatedness, ideology, and practice inform and reinforce each other. Conjuring caricatures of key counterparts—images of what they want and need—creates a character for oneself—an idea of who one is with them and what one has to do for them, and that character, in turn, reinforces the caricatures it is tied to through relatedness. The result is a leader identity that is no longer marginal, or that stays so deliberately, and that is grounded in relations, intent, and structure.

The same cycle can take marginal leaders in different directions. We documented three trajectories through the defining duality (of learning, in our case) and toward leader identities. The majority of our informants took two of those trajectories. One took them closer to the established leaders at the center of the organization, making them custodians of that circle and of the organization. Custodians stood for an instrumental view of their function and brought it to life in spaces built to foster incorporation of deserving learners into the established order. The other went in the opposite direction, closer to learners and away from established leaders, becoming challengers of that circle and of the organization. The stood for a humanistic view of their function and brought it to life in spaces built to empower and support the individuation of all learners.

FIGURE 1
A Theory of Marginal Leaders' Conception of Learning in Organizations



Both those trajectories minimized ambiguity by grounding one's leader identity in a singular view of their function. We borrowed classic systems psychodynamic concepts to theorize that the mechanism of splitting the duality of learning, then projecting its instrumental facet onto established leaders and its humanistic one onto learners, is the origin of the bifurcation between those trajectories. Custodians and challengers then moved toward the identity that fit their history and aspirations and covered what they lacked. The rest of our informants, however, resisted splitting and took a third trajectory. They settled in a marginal place between established leaders and learners, striving to become connectors of the two. They treated the duality of learning as a paradox and worked to integrate its poles, building spaces to foster inclusion and balance.

Theoretical Contributions

This study contributes to scholarship on the construction of leader identities and on the management of dualities. It also bears witness to the predicament of a new cadre of leaders whose principles and practices are just starting to make their way into corporate leadership circles.

Scholars have observed that the more ambiguous an identity, such as leader (DeRue & Ashford, 2010), the more likely it is that the way it is understood and enacted will be the result of interpretations occurring in the context of institutional discourses and interpersonal interactions (Bartel & Dutton, 2001). This study describes how that interpretive process unfolds, and varies, for marginal leaders such as leaders of learning. Its first contribution is a description of the predicament of such leaders. Scholars to date have focused on how claiming certain identities affects informal leaders' emergence (Hanna, Smith, Kirkman, & Griffin, 2021) or formal leaders' effectiveness (Day & Sin, 2011). Our study unearths a boundary region in between the two, in which leaders are no longer emerging, in that they have already earned a formal leadership role but they are not yet on firm ground, since they have yet to craft and claim a viable leader identity. Our findings highlight the challenges and generative potential of that predicament—for scholarship and practice alike.

What is unique about marginal leaders is that they are not just new leaders entering the organization. They represent, at least potentially, a new kind of leadership entering the organization. Like all new leaders, we found, marginal ones have to do the interpersonal work required to craft and enact coherent leader identities and earn recognition and influence in the organization. However, the (identity) work, for marginal leaders, does not stop there. It might not even start there. Before they can show who they are and prove what they can do, those leaders have to figure out why they are leaders and what they are meant to do to create value. Studying

marginal leaders, then, allowed us to surface existential and strategic layers of leaders' identity work that lie beneath and beyond the social layer that scholars are most familiar with. In doing so, our study broadens the leader identity literature's focus on interpersonal validation and institutional legitimacy. Those concerns, we contend, might be the most salient for leaders whose emergence and effectiveness hinges on fitting a dominant template. However, marginal leaders, whose presence challenges and potentially broadens such templates, have to consciously struggle with existential and strategic dilemmas first. Using a systems psychodynamic lens allowed us to surface the interplay between those struggles provoked by contrasting views of the leader's function.

Scholars have long argued that identity work is "grounded in at least a minimal amount of self-doubt and self-openness, typically contingent upon a mix of psychological existential angst and complex or problematic social situations" (Alvesson, Ashcraft, & Thomas, 2008: 15). Little empirical work, however, has documented that mix in leaders' identity work. To claim a leader identity, we contend, one's story cannot just be told, believed, and endorsed. It must be owned, embodied, and built. If leadership, as Sturdy, Brocklehurst, Winstanley, and Littlejohns (2006: 844) put it, "is concerned with being in control existentially as well as structurally," our study suggests that the conception of learning affords the pursuit of both aims. The process we presented allows emerging leaders to simplify ambiguous and anxiety-provoking circumstances, and to conjure a cohort of caricatures in relation to whom they can then build their own characters.

Keeping in mind that "we cannot understand processes of organizing unless we understand identity" (Phillips & Hardy, 2002: 52), our study answers calls to examine the link between becoming and organizing (Brown, 2019), proposing the conception of learning as that link. Reviews have noted that scholars have paid far less attention to the development of leadership than to its practice (Day & Dragoni, 2015). Or, put another way, the leadership literature has focused on doing more than learning, organizing more than becoming. Even when we look into development, we do so through a functionalist rather than through an interpretive lens—we focus on what leaders do, not on what leadership means (Mabey, 2013). That imbalance reveals a preoccupation, perhaps an obsession, with performance that dominates the study (Glynn & Raffaelli, 2010) and practice (Martin, 2020) of leadership. Or maybe it reveals that most leaders' learning is only visible as organizing. We have done more, then, than the small gesture of adding one interpretive study of leaders of learning, and of leaders' learning, on that unbalanced scale. The predicament of marginal leaders allowed us to surface the process that links leaders' development to their practice. In the absence of a clear identity template, we have shown, the two go hand in hand. Leadership is learned and performed at once, brought to life and put to work, through the conception of learning.

Our study also expands theorizing about the meaning and value of leader identities (Day & Harrison, 2007; DeRue & Ashford, 2010). If acquiring one motivates people to engage in the leadership process, we illustrate multiple ways to interpret, and engage in, leadership. While custodians followed the well-studied path of adapting to mainstream demands to secure a place near the center of the organization (Ibarra, 1999), challengers and connectors took less standard routes. The former cast themselves as valuable outsiders needed to disrupt the status quo, the latter as bridges between different ideas and groups. Our findings reinforce theoretical contentions that there is more than one path to viable identities (Dutton, Morgan Roberts, & Bednar, 2010), including identities as leader, and show how different templates of leadership are produced and propagated.

We have answered calls to defy the habit of segregating functional and symbolic facets of leadership (Glynn & Raffaelli, 2010), by illustrating how leaders become symbols and architects of their function. We also speculate, on the basis of our findings, that the duality of instrumental and humanistic definitions of leaders' function underlie that split previously observed by scholars. Wellman (2017), for example, theorized that leaders emerge by embodying either an "authority ranking model," an instrumental view according to which only a few influential individuals can claim leadership, or a "communal sharing model," a humanistic view according to which leadership is everyone's right. The former model echoes the stance of our custodian leaders, whose work strengthened the influence of an exclusive leadership circle, and the latter echoes the stance of our challenger leaders, whose work endeavored to empower everyone to lead. Our study illustrates the systems psychodynamic process through which, past emergence, such models become embedded in organizations as leaders learn who they are meant to be and build identity workspaces for others.

A conceptualization of learning initiatives as identity workspaces (Petriglieri & Petriglieri, 2010) highlights the psychological and social function of

courses, workshops, job rotations, and other activities usually under the purview of L&D executives. These initiatives provide a venue where organizational members learn who they should or can be. Scholars have focused on what happens to people in such identity workspaces (Ely, Ibarra, & Kolb, 2011; Gagnon & Collinson, 2014; Petriglieri, Wood, & Petriglieri, 2011; Petriglieri et al., 2018). This study expands that work, shedding light on the motives and actions of those leaders who arrange the holding.

Our findings suggest that formal and informal learning spaces might, in part, serve to soothe and amplify the vulnerabilities of marginal leaders. We base that speculation on the finding that all three categories of leaders cast learners as lacking that which they had struggled with themselves—specific competencies for their new roles, enough power to remain different, or the opportunity to stay in difficult yet creative dialogues—and designed learning spaces accordingly. Our findings suggest that leaders who anchor their identity to the organization, and embrace an instrumental view of learning, are likely to provide identity workspaces suited to bolstering incorporation, hence strengthening the reproduction of cultural norms. Leaders who anchor their role to a professional community and embrace a humanistic view of learning, conversely, are likely to provide identity workspaces suited to bolstering individuation, hence allowing the questioning of the organizational norms. Leaders who privilege the former might struggle with innovation; the latter, with execution. Both types will struggle with inclusion, which requires holding the duality of learning as a paradox.

Perhaps the most significant contribution of this study, however, is the idea that the defining duality of instrumental and humanistic views of a leaders' function, most salient for marginal leaders such as those we studied, might be at the core of all leaders' identities. Those views are potentially conflicting, yet equally necessary. Without learning, and leading, that anchors and orients people, organization would dissipate. Without learning, and leading, that frees people up, it would fossilize. Showing how leaders navigate this duality in their identity (and) work, our study answers calls to study how leaders balance "diverse and often conflicting ideals" (Alvesson & Einola, 2019: 395) and contributes to the literature on the management of paradoxes (Schad, et al., 2016). Scholars have theorized that individual differences (Voronov & Yorks, 2015) and professional socialization (Besharov & Smith, 2014) are key to the way leaders manage dualities. Our findings provide empirical evidence for those insights, and our theorizing extends them, introducing the conception of learning as leaders' route toward managing a defining duality.

Our systems psychodynamic lens helped us "explore the organizational context and individual capability" that allow leaders to honor competing demands (Smith & Besharov, 2019: 31). Our analysis suggests that faced with a defining duality, the defense mechanisms of splitting and projection help people secure their leadership but make them lose hold of paradox. Resisting the appeal of splitting, and fostering integration, requires giving up a firm position either as an insider or as an outsider. Our findings jibe with Smith and Besharov's (2019) theory that to hold a paradox, leaders must move between center and peripheries of a defining duality. Marginality, then, might be a necessity for leaders to keep holding a paradox. Besharov (2014) observed that such "pluralist" leaders are rare even in an organization that claim to honor divergent values. They might be even rarer when the paradox is not built into the organization but is located in one's function. Holding it then requires personal and social resources. That might explain why the connector trajectory, in our study, seemed to include some of the most seasoned executives in the sample.

Practical Contributions, Generalizability, and Limitations

Besides contributing to scholarly debates, this study informs an important and ongoing conversation in management learning—that on its purpose, value, and practice. This literature so far has focused on the ways learning is understood and practiced at business schools (see Holtom & Dierdorff, 2013; Khurana, 2007; Petriglieri & Petriglieri, 2015). Our study sheds light on the purposes, constructions, and practices of learning in work organizations, the venues where people learn about management and work, and become managers and workers, throughout their life. It also opens a window on the concerns and convictions of executives that serve as academics' clients and partners in the design of executive education. It may explain, for example, under what conditions L&D executives see academics as suppliers of courses, as allies, or as partners. It may also explain the factors that lead to the preference for instructor-centric and outcome-focused pedagogies, for learner-centric and experiential pedagogies, and for a combination of the two.

Our findings are most directly generalizable to leaders of learning, but they might have theoretical generalizability beyond executives in such roles.

Leaders of learning are not the only marginal leaders whose principles and practices—not clearly tied to instrumental performance—make them attractive to, and hard to place in, established leadership circles. The corporate world is witnessing a proliferation of such leaders, whose title commit them to fostering ethics, diversity, innovation, well-being, and so forth. These leaders carry the hope of bringing more balance between instrumental and humanistic principles. Realizing that hope, our theory suggests, requires embracing rather than escaping a degree of marginality. The same might perhaps be true for all leaders who embrace that duality in organizations where one pole remains dominant. They might also find themselves at the margins of leadership, and face the challenges documented here.

Our study invites those leaders to welcome the trouble that comes with carrying such hope and offers some suggestions for how to shoulder both the trouble and the hope of leading from the margins. The first suggestion is to recast marginality as a positive and creative experience, rejecting the association between leadership and centrality. Our study challenged the view of leaders as overcommitted embodiments of their organization and found that occupying the margins productively requires keeping a healthy distance from the organization, caring for it while avoiding excessive identification. Much great leadership, and innovative leadership, has come from those who occupied the boundary between majority and minority, mainstream and avant-garde. While one might not rest easily in such place, it is worth considering that maybe leaders never should. The second suggestion is to build the resources necessary to sustain a productive occupation of marginality. Being marginal well, our study suggests, requires not being alone there. It rather requires sustaining connections with different groups in the organization and with professional groups outside of it. Most leaders, we contend, do not escape marginality. They escape isolation. The most inclusive leaders might be those who do so through hosting different groups.

Our discussion would not be complete without a mention of the study's limitations. Like all inductive studies, one must be cautious about the generalizability of our insights. We drew on a broad set of industries and locations, but our sample remains a theoretical one. Our research participants, by virtue of their roles, give legitimate voice to the predicament and dilemmas that underpin the conception of learning in their organizations, however, their legitimacy must not be mistaken for representativeness. The sizeable fraction of people who took the custodian trajectory in our sample, for example, might reflect the enduring prevalence of an instrumental view of leadership and learning, pulling leaders of learning toward it. However, this should be taken with a large grain of salt. Further research is needed to determine in what conditions our theorizing may be most informative, and the prevalence of different trajectories in various leadership functions.

As is common in qualitative studies, not every individual in our sample fit perfectly in one trajectory. The model is a theoretical extrapolation of patterns we inferred across the sample. The cross-sectional nature of our study, furthermore, does not allow us to make inferences about the dynamism of leaders' views of their leadership and of learning over time. Our theorizing implies that the architecture of learning spaces affirms the identity of their leaders, hence making it likely to remain stable in the same organization, but longitudinal research might fruitfully investigate the extent to which the same person takes different trajectories at different times, in different organizations, or perhaps in relation to different populations. It is also worth noting that some people might not see leadership as part of their identity, but only as a task. Given the nature of our study, we also did not collect data on personality differences or stages of adult development, which might likely affect one's interpretation of leading and learning. Finally, interviews are a more accurate mirror of the internalized reality of informants than they are of their social acts. They were a good fit our investigation of relatedness but did not allow us to go deeper into the tactics that emerging leaders used, for example, to influence others and build consensus around their interpretations. Adding layers of nuance about how these interpretations are enacted, or denied, in organizations will require ethnographic methods within a smaller subset of different organizations.

CONCLUSION

"Leadership and learning are indispensable to each other," U.S. President John F. Kennedy is often quoted saying. But he only planned to say it. He never managed to. The quote is from a speech in Dallas that remained undelivered (Brazeau, 2008). Its text and context are a testament of the challenges facing those who work to conjugate leading and learning. We have tried to do justice to that work and give voice to marginal leaders dedicated to the pursuit of learning. As for all leaders, they can have profound effects on others. However, if all leaders are teachers,

as another saying goes, neither all teachers nor all leaders are the same. Our study revealed how different kinds of leading and learning become indispensable to each other, so to speak, and come to life in organizations. Learning, seen this way, is much like leading. It is always personal, but it never stops with us.

REFERENCES

Aguinis, H., & Kraiger, K. 2009. Benefits of training and development for individuals and teams, organizations, and society. ***Annual Review of Psychology***, 60: 451–474.

Alvesson, M., Ashcraft, K. L., & Thomas, R. 2008. Identity matters: Reflections on the construction of identity scholarship in organization studies. ***Organization***, 15: 5–28.

Alvesson, M., & Einola, K. 2019. Warning for excessive positivity: Authentic leadership and other traps in leadership studies. ***Leadership Quarterly***, 30: 383–395.

Alvesson, M., & Spicer, A. 2010. ***Metaphors we lead by: Understanding leadership in the real world***. Abingdon, U.K.: Routledge.

Ancona, D., & Backman, E. V. 2008. Distributed, shared, or collective leadership: A new leadership model for the collaborative era? Paper presented at the ***68th Annual Meeting of the Academy of Management***, Anaheim, CA.

Anteby, M. 2016. The ideology of silence at the Harvard Business School: Structuring faculty's teaching tasks for moral telativism. ***Research in the Sociology of Organizations***, 25: 103–121.

Argote, L., & Miron-Spektor, E. 2011. Organizational learning: From experience to knowledge. ***Organization Science***, 22: 1123–1137.

Armstrong, D. 1997. The "institution in the mind": Reflections on the relation of psycho-analysis to work with institutions. ***Free Associations***, 7: 1–14.

Arthur, M. B. 2008. Examining itinerant careers: A call for interdisciplinary inquiry. ***Human Relations***, 61: 163–186.

Ashforth, B. E., & Reingen, P. H. 2014. Functions of dysfunction: Managing the dynamics of an organizational duality in a natural food cooperative. ***Administrative Science Quarterly***, 59: 474–516.

Bartel, C., & Dutton, J. 2001. Ambiguous organizational memberships: Constructing organizational identities. In M. A. Hogg & D. J. Terry (Eds.), ***Social identity processes in organizational contexts***: 115–130. Philadelphia, PA: Psychology Press.

Battilana, J., & Dorado, S. 2010. Building sustainable hybrid organizations: The case of commercial microfinance organizations. ***Academy of Management Journal***, 53: 1419–1440.

Berg, D. N., & Smith, K. 1985. ***Exploring clinical methods for social research***. Thousand Oaks, CA: Sage.

Besharov, M. 2014. The relational ecology of identification: How organizational identification emerges when individuals hold divergent values. ***Academy of Management Journal***, 57: 1485–1512.

Besharov, M. L., & Smith, W. K. 2014. Multiple institutional logics in organizations: Explaining their varied nature and implications. ***Academy of Management Review***, 39: 364–381.

Bidwell, M., Won, S., Barbulescu, R., & Mollick, E. 2015. I used to work at Goldman Sachs! How firms benefit from organizational status in the market for human capital. ***Strategic Management Journal***, 36: 1164–1173.

Bion, W. R. 1961. ***Experiences in groups***. London, U.K.: Tavistock Publications.

Bolden, R., & Gosling, J. 2006. Leadership competencies: Time to change the tune? ***Leadership***, 2: 147–163.

Brazeau, G. A. 2008. Leadership and learning. ***American Journal of Pharmaceutical Education***, 3: 56.

Brown, A. D. 2019. Identities in *Organization Studies.* ***Organization Studies***, 40: 7–21.

Bryman, A. 1986. ***Leadership and organizations***. London, U.K.: Routledge & Kegan Paul.

Business Roundtable. 2019. Statement on the purpose of a corporation. Retrieved from https://www.businessroundtable.org/business-roundtable-redefines-the-purpose-of-a-corporation-to-promote-an-economy-that-serves-all-americans

Cable, D. M., Gino, F., & Staats, B. R. 2013. Breaking them in or eliciting their best: Reframing socialization around newcomers' authentic self-expression. ***Administrative Science Quarterly***, 58: 1–36.

Chambers, E. G., Foulon, M., Handfield-Jones, H., Hankin, S. M., & Michaels, E. G. 1998. The war for talent. ***McKinsey Quarterly***, 3: 44–57.

Chen, B. X. 2014, August 10. Simplifying the bull: How Picasso helps to teach Apple's style. ***New York Times***.

Chreim, S., Langley, A., Reay, T., Comeau-Vallée, M., & Huq, J. L. 2020. Constructing and sustaining counter-institutional identities. ***Academy of Management Journal***, 63: 935–964.

Colvin, G. 1999, November 22. The Ultimate Manager in a time of hidebound, formulaic thinking, General Electric's Jack Welch gave power to the worker and the shareholder. He built one hell of a company in the process. ***Fortune***.

Creed, W. E. D., DeJordy, R., & Lok, J. 2010. Being the change: Resolving institutional contradiction through

identity work. ***Academy of Management Journal***, 53: 1336–1364.

Davis, J. 2015, December. Capital markets and job creation in the 21st century. Working Paper, Brookings Institution.

Day, D. V., & Dragoni, L. 2015. Leadership development: An outcome-oriented review based on time and levels of analyses. ***Annual Review of Organizational Psychology and Organizational Behavior***, 2: 133–156.

Day, D. V., & Harrison, M. M. 2007. A multilevel, identity-based approach to leadership development. ***Human Resource Management Review***, 17: 360–373.

Day, D. V., & Sin, H. P. 2011. Longitudinal tests of an integrative model of leader development: Charting and understanding developmental trajectories. ***Leadership Quarterly***, 22: 545–560.

DeRue, D. S. 2011. Adaptive leadership theory: Leading and following as a complex adaptive process. ***Research in Organizational Behavior***, 31: 125–150.

DeRue, D. S., & Ashford, S. J. 2010. Who will lead and who will follow? a social process of leadership identity construction in organizations. ***Academy of Management Review***, 35: 627–647.

DeRue, S., & Myers, C. G. 2014. Leadership development: A review and agenda for future research. In D. V. Day (Ed.), ***Oxford handbook of leadership and organizations***: 832–855. Oxford, U.K.: Oxford University Press.

Dewey, J. 1938. ***Education and experience***. New York, NY: Macmillan.

Dutton, J. E., Morgan Roberts, L., & Bednar, J. 2010. Pathways for positive identity construction at work: Four types of positive identity and the building of social resources. ***Academy of Management Review***, 35: 265–293.

Eisenhardt, K. M. 1989. Building theories from case study research. ***Academy of Management Review***, 14: 532–550.

Elkeles, T., & Phillips, J. J. 2007. ***The chief learning officer***. New York, NY: Butterworth-Heinemann.

Ely, R. J., Ibarra, H., & Kolb, D. M. 2011. Taking gender into account: Theory and design for women's leadership development programs. ***Academy of Management Learning & Education***, 10: 474–493.

French, R., & Vince, R. 1999. Learning, managing and organizing: The continuing contribution of group relations to management and organization. In R. French & R. Vince (Eds.), ***Group relations, management and organization***: 3–19. Oxford, U.K.: Oxford University Press.

Gabriel, Y. 1999. Beyond happy families: A critical reevaluation of the control-resistance-identity triangle. ***Human Relations***, 52: 179–203.

Gagnon, S., & Collinson, D. 2014. Rethinking global leadership development programmes: The interrelated significance of power, context and identity. ***Organization Studies***, 35: 645–670.

Glaser, B. G., & Strauss, A. L. 1967. ***The discovery of grounded theory: Strategies for qualitative research***. Chicago, IL: Aldine.

Glynn, M. A., & Raffaelli, R. 2010. Uncovering mechanisms of theory development in an academic field: Lessons from leadership research. ***Academy of Management Annals***, 4: 359–401.

Grebow, D. 2014. ***The state of learning & development 2014: Coming of age***. Delray Beach, FL: Brandon Hall Group.

Greiner, L. 2002. Steve Kerr and his year with Jack Welch at GE. ***Journal of Management Inquiry***, 11: 343–350.

Guynn, J. 2011, October 6. Steve Jobs' virtual DNA to be fostered in Apple University. Los Angeles Times.

Hanna, A. A., Smith, T. A., Kirkman, B. L., & Griffin, R. W. 2021. The emergence of emergent leadership: A comprehensive framework and directions for future research. ***Journal of Management***, 47: 76–104.

Hatch, M. J., Kostera, M., & Kozminski, A. K. 2009. ***The three faces of leadership: Manager, artist, priest***. Hoboken, NJ: Wiley & Sons.

Hirschhorn, L. 1988. ***The workplace within. The psychodynamics of organizational life***. Cambridge, MA: MIT Press.

Holtom, B. C. & Dierdorff, E. C. (Eds.). 2013. ***Disrupt or be disrupted: A blueprint for change in management education***. Hoboken, NJ: Wiley & Sons.

Hughes, E. C. 1945. Dilemmas and contradictions of status. ***American Hournal of Sociology***, 50: 353–359.

Ibarra, H. 1999. Provisional selves: Experimenting with image and identity in professional adaptation. ***Administrative Science Quarterly***, 44: 764–791.

Ibarra, H., Wittman, S., Petriglieri, G., & Day, D. V. 2014. Leadership and identity. In D. Day (Ed.), ***The Oxford handbook of leadership and organization***: 285–301. Oxford, U.K.: Oxford University Press.

Jarrett, M., & Vince, R. 2017. Psychoanalytic theory, emotion and organizational paradox. In W. K. Smith, M. W. Lewis, P. Jarzabkowski, & A. Langley (Eds.), ***The Oxford handbook of organizational paradox***: 48–65. Oxford, U.K.: Oxford University Press.

Kernberg, O. F. 1979. Regression in organizational leadership. ***Psychiatry***, 42: 24–39.

Khurana, R. 2007. ***From higher aims to hired hands: The social transformation of American business schools and the unfulfilled promise of management as a profession***. Princeton, NJ: Princeton University Press.

Klein, M. 1959. Our adult world and its roots in infancy. ***Human Relations***, 12: 291–303.

Knowles, M. S. 1970. ***The modern practice of adult education: From pedagogy to andragogy***. Cambridge, U.K.: Cambridge Book Co.

Lemoine, G. J., Hartnell, C. A., & Leroy, H. 2019. Taking stock of moral approaches to leadership: An

integrative review of ethical, authentic, and servant leadership. ***Academy of Management Annals***, 13: 148–187.

Levinthal, D. A., & March, J. G. 1993. The myopia of learning. ***Strategic Management Journal***, 14: 95–112.

Lewis, M. 2000. Exploring paradox: Toward a more comprehensive guide. ***Academy of Management Review***, 25: 760–776.

Lincoln, Y. S., & Guba, E. G. 1985. ***Naturalistic inquiry***. Thousand Oaks, CA: SAGE.

Locke, K. 2001. ***Grounded theory in management research***. London, U.K.: SAGE.

Lord, R. G., & Hall, R. J. 2005. Identity, deep structure and the development of leadership skills. ***Leadership Quarterly***, 16: 591–615.

Lord, R. G., Day, D. V., Zaccaro, S. J., Avolio, B. J., & Eagly, A. H. 2017. Leadership in applied psychology: Three waves of theory and research. ***Journal of Applied Psychology***, 102: 434–451.

Lord, R. G., Gatti, P., & Chui, S. L. 2016. Social-cognitive, relational, and identity-based approaches to leadership. ***Organizational Behavior and Human Decision Processes***, 136: 119–134.

Mabey, C. 2013. Leadership development in organizations: Multiple discourses and diverse practice. ***International Journal of Management Reviews***, 15: 359–380.

March, J. 1991. Exploration and exploitation in organizational learning. ***Organization Science***, 2: 71–87.

Martin, R. 2020. ***When more is not better: Overcoming America's obsession with economic efficiency***. Cambridge, MA: Harvard Business Review Press.

Martirossian, J. 2018. The creation and evolution of the chief learning officer role: Perspectives from the first CLO. ***Training Industry Magazine***, Nov–Dec: 38–41

Menzies, I. E. 1960. A case-study in the functioning of social systems as a defence against anxiety: A report on a study of the nursing service of a general hospital. ***Human Relations***, 13: 95–121.

Meyerson, D. E., & Scully, M. A. 1995. Tempered radicalism and the politics of ambivalence and change. ***Organization Science***, 6: 585–600.

Mezirow, J. 1991. ***Transformative dimensions of adult learning***. San Francisco, CA: Jossey-Bass.

Miron-Spektor, E., Ingram, A. S., Keller, J., Smith, W. K., & Lewis, M. W. 2018. Microfoundations of organizational paradox: The problem is how we think about the problem. ***Academy of Management Journal***, 61: 26–45.

Noe, R. A., Clarke, A. D. M., & Klein, H. J. 2014. Learning in the twenty-first-century workplace. ***Annual Review of Organizational Psychology and Organizational Behavior***, 1: 245–275.

Padavic, I., Ely, R. J., & Reid, E. M. 2019. Explaining the persistence of gender inequality: The work-family narrative as a social defense against the 24/7 work culture. ***Administrative Science Quarterly***. doi: 10.1177/0001839219832310

Park, R. E. 1928. Human migration and the marginal man. ***American Journal of Sociology***, 33: 881–893.

Patton, M. Q. 1990. ***Qualitative research and evaluation methods***. London, U.K.: SAGE.

Peterson, J. 2012, November 13. Just what are you trying to say? ***Forbes***.

Petriglieri, G. 2014, November 6. Learning is the most neglected celebrated activity in the workplace. ***Harvard Business Review***.

Petriglieri, G. 2020. F**k Science!? An invitation to humanize organization theory. ***Organization Theory***, 1: 1–18.

Petriglieri, G., Ashford, S. J., & Wrzesniewski, A. 2019. Agony and ecstasy in the "gig economy": Cultivating holding environments for precarious and personalized work identities. ***Administrative Science Quarterly***. doi: 10.1177/0001839218759646.

Petriglieri, G., & Petriglieri, J. L. 2010. Identity workspaces: The case of business schools. ***Academy of Management Learning & Education***, 9: 44–60.

Petriglieri, G., & Petriglieri, J. L. 2015. Can business schools humanize leadership? ***Academy of Management Learning & Education***, 14: 625–647.

Petriglieri, G., & Petriglieri, J. L. 2020. The return of the oppressed: A systems psychodynamic perspective on organization studies. ***Academy of Management Annals***, 14: 411–449.

Petriglieri, G., Petriglieri, J. L., & Wood, J. D. 2018. Fast tracks and inner journeys: Crafting portable selves for contemporary careers. ***Administrative Science Quarterly***, 63: 479–525.

Petriglieri, G., & Stein, M. 2012. The unwanted self: Projective identification in leaders' identity work. ***Organization Studies***, 33: 1217–1235.

Petriglieri, G., Wood, J. D., & Petriglieri, J. L. 2011. Up close and personal: Building foundations for leaders' development through the personalization of management learning. ***Academy of Management Learning & Education***, 10: 430–450.

Phillips, N., & Hardy, C. 2002. ***Discourse analysis: Investigating processes of social construction***. Thousand Oaks, CA: SAGE.

Piaget, J. 1969. ***The psychology of the child***. London, U.K.: Routledge & Kegan Paul.

Pillans, G. 2017. Learning: The foundation for agility and sustainable performance. London, U.K.: Corporate Research Forum.

Pratt, M. G., & Crosina, E. 2016. The nonconscious at work. ***Annual Review of Organizational Psychology and Organizational Behavior***, 3: 321–347.

Raelin, J. A. 2007. Toward an epistemology of practice. ***Academy of Management Learning & Education***, 6: 495–519.

Ramarajan, L., & Reid, E. 2020. Relational reconciliation: Socializing others across demographic differences. ***Academy of Management Journal***, 63: 356–385.

Sandhu, S., & Kulik, C. T. 2019. Shaping and being shaped: How organizational structure and managerial discretion co-evolve in new managerial roles. ***Administrative Science Quarterly***, 64: 619–658.

Schad, J., Lewis, M., Raisch, S., & Smith, W. K. 2016. Paradox research in management science: Looking back to move forward. ***Academy of Management Annals***, 10: 5–64.

Shamir, B., & Eilam, G. 2005. "What's your story?" A life-stories approach to authentic leadership development. ***Leadership Quarterly***, 16: 395–417.

Shapiro, E. R., & Carr, A. W. 1991. ***Lost in familiar places: Creating new connections between the individual and society***. New Haven, CT: Yale University Press.

Simmel, G. 1950. The stranger. In K. H. Woolff (Ed.) ***The sociology of Georg Simmel***: 402–408. New York, NY: The Free Press. (Original work published 1908.)

Smets, M., Jarzabkowski, P., Burke, G., & Spee, P. 2015. Reinsurance trading in Lloyd's of London: Balancing conflicting-yet-complementary logics in practice. ***Academy of Management Journal***, 58: 932–970.

Smith, W. K. 2014. Dynamic decision making: A model of senior leaders managing strategic paradoxes. ***Academy of Management Journal***, 57: 1592–1623.

Smith, W. K., & Besharov, M. L. 2019. Bowing before dual gods: How structured flexibility sustains organizational hybridity. ***Administrative Science Quarterly***, 64: 1–44.

Smith, W. K., & Lewis, M. W. 2011. Toward a theory of paradox: A dynamic equilibrium model of organizing. ***Academy of Management Review***, 36: 381–403.

Snow, D. A., & Anderson, L. 1987. Identity work among the homeless: The verbal construction and avowal of personal identities. ***American Journal of Sociology***, 92: 1336–1371.

Spradley, J. P. 1979. ***The ethnographic interview***. New York, NY: Holt, Rinehart and Winston.

Stonequist, E. V. 1935. The problem of the marginal man. ***American Journal of Sociology***, 41: 1–12.

Strauss, A., & Corbin, J. 1998. ***Basics of qualitative research: Grounded theory procedures and techniques.*** 2nd ed. Thousand Oaks, CA: SAGE.

Sturdy, A., Brocklehurst, M., Winstanley, D., & Littlejohns, M. 2006. Management as a (self) confidence trick: Management ideas, education and identity work. ***Organization***, 13: 841–860.

Training Industry. 2017. Size of the training industry. Retrieved from https://trainingindustry.com/wiki/learning-services-and-outsourcing/size-of-training-industry/

Treviño, L. K., den Nieuwenboer, N. A., Kreiner, G. E., & Bishop, D. G. 2014. Legitimating the legitimate: A grounded theory study of legitimacy work among Ethics and Compliance Officers. ***Organizational Behavior and Human Decision Processes***, 123: 186–205.

Tsoukas, H. 2009. A dialogical approach to the creation of new knowledge in organizations. ***Organization Science***, 20: 941–957.

van Knippenberg, D., & Hogg, M. A. 2003. A social identity model of leadership effectiveness in organizations. ***Research in Organizational Behavior***, 25: 243–295.

Vera, D., & Crossman, M. 2004. Strategic leadership and organizational learning. ***Academy of Management Review***, 29: 222–240.

Vince, R. 2019. Institutional illogics: The unconscious and institutional analysis. ***Organization Studies***, 40: 953–973.

Vince, R., & Broussine, M. 1996. Paradox, defense and attachment: Accessing and working with emotions and relations underlying organizational change. ***Organization Studies***, 17: 1–21.

Voronov, M., & Weber, K. 2020. People, actors, and the humanizing of institutional theory. ***Journal of Management Studies***, 57: 873–884.

Voronov, M., & Yorks, L. 2015. "Did you notice that?" Theorizing differences in the capacity to apprehend institutional contradictions. ***Academy of Management Review***, 40: 563–586.

Vygotsky, L. S. 1962. ***Thought and language***. Cambridge, MA: MIT Press.

Wellman, N. 2017. Authority or community? A relational models theory of group-level leadership emergence. ***Academy of Management Review***, 42: 596–617.

Zheng, W., Meister, A., & Caza, B. B. 2020. The stories that make us: Leaders' origin stories and temporal identity work. ***Human Relations***. doi: 10.1177/0018726720909864.

Gianpiero Petriglieri (Gianpiero.Petriglieri@insead.edu) is associate professor of organizational behavior at INSEAD. He takes a systems psychodynamic perspective to research leadership, identity, and learning in the workplace.

Annie Peshkam (Annie.Peshkam@insead.edu) is a faculty coach and executive coach to management educators and leaders. She explores how they connect their learning to their people's learning using her background in the learning sciences and systems psychodynamic theory.

APPENDIX A

INTERVIEW PROTOCOL

As noted in the manuscript, the interview protocol evolved as data collection became more focused on informants positioned themselves as leaders in the organization while devising learning initiatives for their organizations. We have italicized questions that we introduced, emphasized, or followed up on more to deepen our inquiry over time.

A. BACKGROUND AND EXPERIENCE

A1. Could you tell me a about your background?
A2. *What type of training have you received for this role?*
A3. *What attracted you to this field of work?*
Have you found it matches your expectations? Why? Why not?
A4. *What resources do you refer to, to keep up with the field?*

B. ROLE

B1. Where is your role positioned in the company?
How long have you been working at you current company?
What is your current role? How long have you held that position?
Could you describe your responsibilities?
B2. How many people are there in your in your team?
Who reports to you?
B3. Who do you report to?
Do you report to a board? The CEO?
B4. What are the challenging aspects of your role?
B5. How do you overcome some of these challenges? What resources do you draw on?
Does your team or people who report to you help you with these challenges? How?
Does the company or people you report to help you with these challenges? How?
B6. Could you give an example of a day when you felt successful? What happened?
B7. Could you give an example of a day when you worried about failing? What happened?

C. DEVELOPING TALENT & LEARNING INITIATIVES

C1. What learning or development initiatives do you provide?
Could you give me some examples?
Are these opportunities internal or external?
Do you partner with academic institutions or other providers?
C1. Who decides to enroll people into different types of learning & development initiatives?
Describe process your company uses to recognize and develop talent, if you can.
C3. How do you assess learning after these initiatives?
Who is involved with collecting this data?
How is this data interpreted and used?
C4. How do you assess value, impact, success for a learning initiative?
C5. *Overall, what would is your guiding philosophy of learning and development?*
Is that philosophy shared at your company?

D. FUTURE OF LEARNING

D1. What are the characteristics that leaders need to be successful?
Elicit general, and possibly in relation to learning.
D2. *If you met someone interested in your kind of role, what advice would you give?*
D3. *How do you hope L&D in organizations will evolve in the future?*