

**Inclusive Leadership as an Enabler for Situational Leadership Theory: Impacts Across
Phases of the Leadership Journey**



HR 5033: Leadership in Organizations

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Introduction

A rising number of organizations are recognizing the impact of Inclusive Leadership (IL) on positive business outcomes in areas like employee innovation, workforce engagement, retention and more effective problem-solving (Travis et al., 2019) and embedding IL training and awareness into talent development programs. According to Catalyst's model for inclusive leadership, leaders should be able to lead outward by extending accountability, ownership and allyship to team members. They should also lead inward by demonstrating curiosity, humility and courage (Travis et al., 2019). Inclusive leaders recognize the value of workforce diversity and strive to ensure that all team members are treated fairly, experience a genuine sense of belonging and have the resources needed perform at their best.

Situational Leadership Theory (SLT) has gained popularity since the 1970s following its introduction by Paul Hersey and Ken Blanchard (Wolf, 2021). This leadership style centers on the leader-follower relationship and the effectiveness of leaders to adopt a delegating, supporting, coaching or directing leadership style based on follower readiness in relation to tasks as well as their psychological readiness (Wolf, 2021). SLT suggests that different levels of experience, skills competencies will require different management styles.

While SLT can positively impact leader effectiveness and deliver positive business outcomes, there are weaknesses in these leadership styles such as the potential to create confusion or perceptions of inauthentic leadership (Wolf, 2021). There is an opportunity for SLT to expand beyond follower readiness by considering inward actions or self-reflection by leaders themselves. This is where Inclusive Leadership can help preempt disadvantages or balance out potential shortcomings of Situational Leadership styles.

There is synergy between IL and SLT in that both agree a ‘once-size-fits-all’ approach to leadership is ineffective. Instead, leadership styles need to be flexible and adaptive to meet the diverse and unique needs of followers and enable performance through ever changing situations and evolving business needs. The purpose of this paper is to highlight synergies between Situational Leadership Theory and Inclusive Leadership and illustrate how applications of both leadership styles combined can help enable leaders to lead more effectively throughout distinct phases of the leadership journey.

Literature Review

Leadership cannot be viewed as singular role or experience. It is an evolving journey that calls for different skills and competencies at different times to deliver positive business outcomes. Situational conditions can predict or determine the effectiveness and outcomes of various leadership styles. Leaders should adjust their management styles and decide whether to be more authoritarian versus collaborative, supportive versus directive, depending on the specific situation and conditions at hand (University of Minnesota, 2017, Chapter 12). Supplementing SLT styles with IL practices can positively impact leadership effectiveness to support diverse individuals and teams operate across many different situations, scenarios.

For example, in a study on the four SLT styles Zigarmi and Roberts (2017) explore how delegating, supporting, coaching and directing tactics are needed and received as experienced by followers. Results indicate while three out of the four styles were experienced or received by participants, but all four were identified as being needed or necessary. There were fewer reported experiences of the directive style (pp. 251-252). This gap poses important questions for practitioners to consider why the directive approach is infrequently experienced or received and if this is indicative of leader readiness in this style. When team members feel they need high

direction and their leaders fail to deliver, this could result in unfavorable outcomes for the individual, the team and the greater organization. The study also suggests that leaders may be deploying delegating tactics too often when they should lean towards more directive action (p. 256).

Increasing self-awareness of leaders through inward reflection is one example of how IL can enable situational leadership effectiveness. When follower needs, or perception of needs, are better aligned with the leadership practices they receive, the likelihood of favorable outcomes increases. This can be illustrated across various phases of the leadership journey.

Frontline, New and Emerging Leaders

New managers and individuals supervising from the frontlines represent the largest population of leaders in a typical organization and will be relatively new to key leadership competencies around communication, influencing and motivating others and developing self-awareness (Center for Creative Leadership, n.d.). In addition to training and education about SLT, self-assessments based on situational leadership styles can be a helpful resource or tool to enable new leaders establish a foundation to manage their teams and deliver desired organizational outcomes more effectively (Henkel & Bourdeau, 2018, p.12). Self-assessments also support IL practices linked to leading inward and developing a curiosity of self as well as others.

Curiosity is a critical IL trait (Travis et al., 2019). New leaders who have only recently assumed responsibilities over people and teams need to demonstrate curiosity of others and start considering diverse perspectives and needs of individuals. Fiedler's 'Least Preferred Coworker' scale promotes the idea that different people, with different traits, can be effective in various

situations (University of Minnesota, 2017, Chapter 12). This can serve as foundational prompt to new leaders to try and proactively place the right people in the right situations and even alter work conditions to best suit individuals and enable them to perform at their best.

This concept aligns well with SLT, which encourages leaders to match their personal management styles to enable performance based on follower readiness. The ability to read a particular situation will determine the most appropriate leadership approach and help inform new leaders when to operate in a more directive or supportive role.

Motivating employees is another leadership responsibility that may be new or unfamiliar to emerging leaders. Understanding motivational theory and various motivational frameworks can help frontline leaders optimize individual performance across various situations or working conditions. For example, a leader's ability to identify whether an individual has a high need for achievement, versus a high need for affiliation or power can prove to be helpful in navigating through different situations. Leaders can also break down situational conditions through a lens of 'hygiene factors' versus motivators. Process-based motivational theories can also help leaders determine what management tactics to deploy to help improve performance or reinforce desired behaviors and attitudes. Equity theory highlights the importance of perceptions of fairness when it comes to individual inputs and outputs. Expectancy theory highlights the importance for a leader's ability to define expectancy, instrumentality and valence in any given situation to motivate individuals more effectively (University of Minnesota, 2017, Chapter 5).

Inclusive leaders who can demonstrate curiosity may be able to adapt their situational leadership approach to emphasize a particular motivational factor. For example, when an individual is driven by achieving a sense of power, it may be wise for leaders to seek

opportunities to delegate tasks or decisions to those individuals. (University of Minnesota, 2017, Chapter 5).

The Mid-level Managers

In addition to leading oneself and leading others, leading from the middle requires managers and supervisors to balance needs and demands from a variety of stakeholders through a systematic approach and navigating through complex organizational systems (Center for Creative Leadership, n.d.). With added layers of responsibility, traditional leadership practices grounded in ‘command and control’ tactics, which are often employed on the frontlines, no longer serve the long term organizational success or sustainable workforce performance.

Leaders who rely on a singular approach will undoubtedly fail to meet the needs of ever-changing and disruptive market conditions, evolving business goals and objectives, and even changes to worker expectations. Situational awareness becomes even more critical for mid-level managers. Jordan et al. (2020) identifies seven tensions or situations that call on leaders to determine what leadership style or practice would likely deliver the best outcomes. Examples of these tensions include assessing when to strive towards perfection versus prioritizing accelerated action or leaning towards one’s intuition versus adopting a highly analytical approach to decision-making. Navigating these tensions requires leaders to demonstrate high levels of self-awareness, situational awareness and learning to adapt and employ different practices as appropriate (Jordan et al., 2020). This is aligned with inclusive leadership practices and the four leadership styles in situational leadership theory.

Coaching is a one of the four leadership styles presented in situational leadership theory and involves understanding of how to unlock the full potential of individuals to maximize

performance in various situations. Ibarra and Scoular (2019) share insights into potential strengths and weaknesses of different coaching styles - such as situational, directive and non-directive – when leaders are faced with challenging situations or periods of disruption and change. These coaching models can help promote more effective problem-solving and better engage team members through more collaboration, which are also outcomes of inclusive leadership. In situational coaching, leaders must learn how to balance directive and nondirective management styles. When this is achieved at scale, then situational coaching becomes an organizational capability that has the potential to truly transform a company's culture (Ibarra & Scoular, 2019).

As mid-level managers gain more experience in employing different situational leadership styles and increased self-awareness, they will increase their ability to be flexible and adaptive to a broader range of situational conditions. In a research study involving military managers who attended an advanced leadership program Henkel and Bourdeau (2018) observed how situational leadership behaviors and competencies were adopted by participants. Results from the study suggested that individuals will have a primary and secondary leadership style (p.12). This could indicate an opportunity to further expand leaders' knowledge in all four styles and help shape future leadership development programs to promote greater awareness and understanding of how and when to deploy any of these styles. Leaders may not necessarily believe they are capable or competent in all four situational leadership styles, but with training, development and experience over time, they can learn to adopt different leadership practices to suit the needs of their people as well as broader organizational goals. As noted by McPherson (2016), this ability is also an example of demonstrating leadership agility (p.2).

Senior Executives

At the most senior leadership positions, leaders take on additional responsibilities and demands that are centered around ensuring the broader organization's success by leveraging strategic vision. At this level, senior leaders will be defined based on their contributions to organizational impact and the most successful executives will have the ability to strategize, execute, and influence at both a tactical and strategic level (Center for Creative Leadership, n.d.).

To be effective, executive leaders must be attuned to organizational health changes, in addition to understanding of oneself and effectively leading people and teams. Senior leaders must be agile and demonstrate their ability to deploy different leadership competencies and behaviors in different situations, with a critical focus to help improve a company's organizational health. Bazigos et al. (2016) discuss present the 'situational leadership staircase', which highlights four broad transition points in organizational health and helps identify the leadership behaviors that will best support improved performance (p.4). Baseline leadership behaviors such as collaboration, driving desired outcomes and offering critical perspectives are essential in most situations.

When companies need to "dig out" of challenging situations such as decreasing customer satisfaction and loyalty or low levels of workforce morale, leaders will focus more on decision-making and problem-solving capabilities. In the upswing quartile, leaders should focus on driving team cohesion, keeping everyone on task, ensuring clarity on objectives and desired outcomes and seeking diverse perspectives. In the "top quartile" of organizational health, leaders will focus on motivation to bring out the best performance in others and help reinforce core values (Bazigos et al., 2016, pp. 5-7). This situational adaptability aligns with general principles of situational leadership theory and understanding when directive and supportive behaviors

should be employed based on organizational health phases. When leaders demonstrate behaviors or attitudes that are not attuned to an organization's specific situation and circumstance, this can ultimately waste time and resources and reinforce undesirable behavior, which leads to undesirable outcomes (Bazigos et al., 2016, p. 7).

Leadership agility is critical for senior executives. Agile leadership emphasizes the importance of mental agility to assess and address complex issues and enhancing one's ability to deal with change and uncertainty, especially as individuals advance into more senior leadership roles (McPherson, 2016). Principles of agile leadership align well with situational leadership theory, as agile leadership traits include the ability to cope with unfamiliar or uncomfortable situations, quickly familiarize themselves with complex issues through inquisitiveness, and being able to apply their knowledge and experiences to a broad range of situations.

Implications for Practitioners and Future Research

When employees experience higher levels of inclusion, this can lead to better problem-solving within teams, increased work engagement, higher levels of loyalty to the organization and enhanced employee innovation. This highlights the importance of inclusive leadership practices to organizational performance. An opportunity exists for human resource and diversity, equity and inclusion practitioners to further study the impacts of situational leadership styles on experiences or the five 'hallmarks of inclusion': feeling valued, feeling trusted, the ability to be authentic and two dimensions of psychological safety (Travis, Shaffer, & Thorpe-Moscon, 2019). Future research could test and further confirm that SLT leaderships styles alone underperform in comparison to a combined approach with IL practices to increase experiences of inclusion, and potentially reinforce the case for embedding both into a company's talent frameworks and leadership development programs.

There is also a growing focus on the importance of business agility. Adopting a more talent-centric approach over conventional strategy-led organizations can lead to positive business outcomes, but to make this shift, companies need to consider agile leadership practices and redesigning outdated human resource processes. Leaders need to be equipped with the skills and competencies to match the right people to the right projects or initiatives and enabling their success with the best leadership tactics. Agile deployment and management of talent is in line with principles of situational leadership styles.

Agile management touts the importance of prioritizing solutions over sales and encourages organizations to focus on a talent-first approach over the conventional strategy-led operating model (Denning, 2018, p.7). Agile recognizes the inevitability of changing market conditions or situational conditions. In line with inclusive leadership practices, flexibility and adaptability, through a lens of enabling individuals to thrive, are key to agile people management and an acute sense of adapting leadership behaviors and practices can help contribute a more agile organizational model.

Conclusion

While there is no single correct leadership style or approach to successfully lead people and teams, partnering Situational Leadership styles with Inclusive Leadership practices can better enable leaders to lead more effectively throughout various phases of the leadership journey. This paper outlined clear synergies between Inclusive Leadership and Situational Leadership Theory in promoting flexible and adaptive leadership styles, which help deliver the unique needs of diverse teams and organizations.

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