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Leadership theory and practice: Fostering an effective symbiosis

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Abstract

Leadership theory has not lived up to its promise of helping practitioners resolve the challenges and problematics that occur in organizational leadership. Many current theories and models are not contextualized, nor do the dynamic and critical issues facing leaders drive their construction. Alternatively, practitioners too often approach leadership problems using trial and error tactics derived more from anecdotes and popular fads than validated scientific data and models. Yet, while this gap between theory and research has bedeviled the leadership community for much of its history, there have been few if any systematic examinations of its causes. In this review, we have sought to highlight the particular barriers on the leadership practice and theory-building/testing constituencies, respectively, that constrain efforts to integrate them. We also offer a number of propositions and guidelines that we hope can break through these barriers and help stakeholders create a more effective leadership theory and practice symbiosis (LTPS). Finally, we have offered two cases of effective LTPS as examples and models for such integrative research efforts.

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1. Introduction

The greatest handicap of applied psychology has been the fact that, without proper theoretical help, it had to follow the costly, inefficient, and limited method of trial and

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error. Many psychologists working today in an applied field are keenly aware of the need for close cooperation between theoretical and applied psychology. This can be accomplished in psychology, as it has been accomplished in physics, if the theorist does not look toward applied problems with highbrow aversion or with a fear of social problems, and if the applied psychologist realizes there is nothing so practical as a good theory (Lewin, 1951, p. 169).

These words marked Kurt Lewin's instructions to social psychologists to integrate theory and practice in their investigation and responses to social phenomena. The study of leadership as one such phenomenon was rooted in social psychology, and indeed represents a prime candidate in this discipline to exemplify Lewin's call for integration. Despite this promise, the field of leadership is littered with many examples of theories and models that have failed utterly when put to the test of solving leadership-related problems.

Many other theories have been developed without regard for the problems of leadership posed in many organizations; instead, they seek, in the tradition of basic research, to explain and understand the social influence dynamics of leadership. There is a very necessary place for such research, but it should subsequently provide the platform for understanding and resolving practical leadership problems. While current leadership theories have grown in sophistication and breadth, they have not translated into a comparable range of effective practices.

The leadership practice literature is in turn riddled with trial and error applications that are grounded more in the anecdotes of key policymakers, sponsoring stakeholders, and targeted constituencies than in scientific data and models. The popular literature offers a never-ending stream of books and articles that offer leadership wisdom and principles, again reflecting single case studies, anecdotal evidence, and common sense reflections upon actual experiences. We do not intend to disparage these sources of ideas. Yet they should serve as a complement to, or better, an instigator of scientific and theoretical inquiry, not its replacement. Indeed, organizational managers and leadership practitioners tend to place greater weight on popular offerings than on scientifically grounded and appropriately tested principles.

There have been few if any attempts in the leadership literature to articulate the principles and features of an effective symbiosis of leadership theory and practice. As a biological term, "symbiosis" refers to the condition of organisms that either live physically connected to one another, or one lives inside the other. The key to the symbiotic relationship is that each organism thrives because of the connected existence of the other. The metaphorical lesson for leadership suggests that leadership theory and practice can each exhibit more vibrancy and vitality when connected more closely to the other.

The purpose of this review is to offer a framework and principles that should foster more effective leadership theory–practice symbioses (LTPS). As noted, few systematic efforts to articulate such a framework exist in the leadership literature. Blair and Hunt (1985) offer one such framework for leadership research in the U.S. Army. Zaccaro (1996) also offered a basis for leadership research and practice in the Army. Using these as a baseline, the present article examines the impediments to an effective LTPS and offers models and principles that could

strengthen the symbiotic connection. We also review two programmatic examples that successfully integrated leadership theory and practice.

2. Pitfalls of integrating leadership theory and practice

Blair and Hunt (1985) summarized a number of limitations on past leadership research efforts. Most of these concerned the lack of relevance and connection of theoretical research to applied interests. In this section, we begin with Blair and Hunt's observations, and follow with several more concerns and pitfalls. We consider these separately for leadership theory and practice.

2.1. Concerns with leadership theory and research

Blair and Hunt (1985) list four major limitations regarding past leadership research. They are (1) a primary focus on interpersonal aspects of leadership, (2) a limited set of explanatory variables, (3) nonprogrammatic past research, and (4) a lack of policy relevance. To this list, we would add, (5) little attention given to the conceptual dynamics of applied questions (e.g., leader development, leader selection).

2.1.1. Focus on interpersonal level

Much of the existing research on leadership has focused at the level of direct supervision, with the major unit of analysis being the relationship between the leader and followers (Zaccaro & Klimoski, 2001). As noted by Zaccaro and Klimoski (2001) this analysis has considered characteristics of the leader, characteristics of followers, and characteristics of their relationship. Leader interaction style has received, by far, the most attention in the literature. This focus dates to the Ohio State research program on leader initiating structure and consideration (Fleishman, 1953, 1973; Fleishman & Harris, 1962; Halpin & Winer, 1957; Stogdill & Coons, 1957). Studies by researchers at the University of Michigan, which occurred at the same time as the Ohio State studies, crystallized task- and relationship-oriented leadership styles, and added participative leadership as a third style. The fundamental dichotomy between relationship-oriented or consideration styles and task-oriented or structuring styles has been dominant across multiple interpersonal and social exchange theories of leadership. Fiedler's (1964, 1971) contingency theory uses versions of these two constructs to define how enduring leader attributes interact with situational parameters to influence leader effectiveness. Other theories describe how leaders vary their application of different styles and behaviors in accordance with situational demands (Blake & Mouton, 1964; Hersey & Blanchard, 1969; House & Mitchell, 1974; Kerr & Jermier, 1978; Vroom & Yetton, 1973).

Interpersonal theories of leadership that have focused on follower characteristics include the leader legitimacy framework of Hollander et al. (Hollander, 1964, 1979; Hollander & Julian, 1970), and leader categorization theory by Lord et al. (Cronshaw & Lord, 1987; Lord, Foti, & De Vader, 1984; Lord & Maher, 1993). These approaches examine the perceptions held by subordinates of the leader, and the role these perceptions and cognitions in

legitimizing the leader's attempts at social influence. Other models (Hersey & Blanchard, 1969, 1984; Howell & Dorfman, 1981; Kerr & Jermier, 1978) describe how follower or subordinate characteristics moderate the actions of their leader.

Theories and models of leadership have investigated the social exchange and interpersonal dynamics of leader and followers. Fiedler (1964) treats the overall quality of this relationship as a key situational moderator. Vroom and Yetton (1973; also Vroom & Jago, 1978, 1988) prescribe the circumstances that allow for greater or less degrees of follower participation in leader decision making. Transformational leadership models (Bass, 1985, 1996; Bass & Avolio, 1990, 1993) describe the sense of empowerment gained by followers from certain types of interactions with their supervisors or leaders. Dansereau, Graen, and Haga (1975) and Graen and Uhl-Bien (1998) described how leader–subordinate dynamics varied across individuals and subgroups of followers.

Taken together, these theories have been quite successful in defining a number of potential variables and processes that define effective leadership. They have also yielded a number of generic practical applications including leader assessment tools (references) and leader training programs (Fiedler & Chemers, 1982). Indeed, the primary emphasis of early leadership researchers in this genre on identifying the categories of effective leadership behavior provided a substantial conceptual and empirically validated basis for potential leader assessment, development and training tools. However, their potential utility is limited by their constrained focus and by disconnection from specific leadership problems. These models were developed primarily to explain effective interpersonal and direct leadership, not to explain indirect forms of leadership. These models did not take a multilevel approach to leadership, assuming accordingly that the processes of leadership were relatively similar at lower and higher organizational levels. This limited their effective application to lower level leadership problems. Also, they did not address specific leadership problems; instead, their ideas and concepts about leadership were applied post hoc. While such application is not necessarily inappropriate, the fit between theoretical concepts and models and applied problems will often be less than ideal, with implications for the validity of practical interventions.

As noted, these theories focused on direct leadership. While all leaders engage in such processes with their subordinates, some of the leadership processes that are most likely to add significant value at higher organizational levels involve indirect and systems-wide influence. Middle-level leaders are responsible for managing multiple units, and typically providing direction to managers two or more lower levels removed. They are also required to take a two-way perspective that involves both upward and downward influence of other leaders. Executive-level leaders provide system-wide direction and influence, and in many cases never meet all of the followers they influence (Hunt, 1991; Jacobs & Jaques, 1987, 1990, 1991; Zaccaro, 2001). Interpersonal theories of leadership do not apply readily to such forms of influence.

Until fairly recently, executive leadership represented only a small part of leadership research. Day and Lord (1988) noted, “The topic of executive leadership. . .has not been a major concern of leadership researchers or theorists. Their focus has been primarily lower-level leadership” (p. 458). A rough analysis by Zaccaro (2001) suggested that only about 2–

5% of the general leadership literature focused on executive leadership. Recently, this trend has shifted with a greater number of studies on executive leadership emerging in the literature (Boal & Hooijberg, 2000; Finkelstein & Hambrick, 1996; Zaccaro, 2001; Zaccaro & Klimoski, 2001). However, leadership researchers have not formulated systematic and comprehensive models of middle-level leadership that specify the unique performance requirements and processes of leaders who lead and manage multiple small units from a two-way perspective. These lack of theories and models of upper level leadership mitigate the symbiosis of leadership theory and practice at these levels.

2.1.2. A limited set of explanatory variables

Blair and Hunt (1985) noted the limited set of explanatory variables in the leadership literature. Many theories specify characteristics of the leader and followers as key sets of variables, while others have documented situational variables that moderate the effective practice of leadership. More recently theorists have begun to expand the list of potential explanatory variables to reflect more macro and systems level processes. Thus, leadership researchers have examined systems variables such as organizational life cycles (Baliga & Hunt, 1988; Hunt, Baliga, & Peterson, 1988), organizational hierarchy (Hunt, 1991; Jacobs & Jaques, 1987, 1991, 1990; Zaccaro, 2001), and organizational culture (Trice & Beyer, 1993; Schein, 1992), both as a mediator of leadership influence and as a moderator of its practice (references). Other theorists have been focusing more attention on the context of leadership that extends and expands previous contingency models. Whereas contingency models argue for a fit between leader attributes and situational variables, contextual approaches contend understanding leadership requires an exploration of how context defines the performance requirements and practice of leadership. Leadership is not defined merely as a reaction to situational events, but rather as a process that is shaped in multiple ways by contextual forces and dynamics.

Along these lines, Osborn, Hunt, and Jauch (2002) offered a contextual theory of leadership that defines four contexts as embedding the practice of leadership: stability, crisis, dynamic equilibrium, and edge of chaos. The first three contexts reflect typically operating conditions at three organizational levels, while the fourth context reflects an operating condition for the entire system.

In stable contexts, the conditions within the unit or organization (i.e., its structure and processes) and outside its boundaries in its external environment are relatively static. Leadership at the lowest organizational levels operates mostly in stable contexts, as middle and upper managers provide the structures, processes, and direction for influence (Zaccaro, 2001). Crisis contexts represent “dramatic departure from prior practice and sudden threats to high priority goals with little or no response time” (Osborn et al., 2002, p. 800). Such contexts typify the environment for middle-level managers, who occupy a unique two-way perspective between the wide indirect influence of senior leader and the direct interpersonal influence of lower level leaders. Their task is to translate the often shifting priorities of executives to immediate and short-term goals and actions (Zaccaro, 2001). Dynamic equilibrium reflects the context of change, reflecting an incremental realignment of an organization with its embedding environment. Such contexts influence executive leadership,

which involve processes of providing long-term direction and strategic change, and managing the entire system in pursuance of change (Zaccaro, 2001). The final context, “edge of chaos” characterizes fast-paced environments. Such contexts reflect highly adaptive and dynamic organizations, and they offer many interesting implications for leadership theory and practice. In terms of organizational dynamics, and therefore organizational leadership requirements, Osborn et al. (2002, p. 822) noted:

In this context organizations confront dynamism, nonlinearity, and unpredictability. The context is not so dynamic, nonlinear, and unpredictable that organisms cannot survive (as in chaos); but it does not permit firms to linger or seek even a dynamic equilibrium. They must move to a different “fitness” landscape or suffer the consequences. Fitness, not goals or strategic accomplishments, becomes the criterion of interest. In this context, systems do not evolve to merely adjust to isolated changes. The systems are involved in moving the systems they deal with and themselves into uncharted new territory that may threaten their individual existence but increase the general level of “fitness” and survival for those making the transitions.

Such a perspective of leadership contexts greatly expands the kinds of variables and processes that define and explain the practice of leadership. Zaccaro and Klimoski (2001) argued for a similar role for context in establishing some boundary conditions for leadership theory building and model specification. They argued that organizational contexts influence and mediate the “fundamental nature of leadership work, including those forces that animate or retard leadership initiatives or behaviors, themselves” (p. 13). Contexts shape the performance imperatives that define the parameters of leadership action. Zaccaro and Klimoski offer seven general leader performance imperatives that are in turn shaped by contextual forces: cognitive, social, personal, political, technological, financial, and staffing. Thus, while Osborn et al. (2002) provide a specification of contextual forces, Zaccaro and Klimoski offer a set of imperatives through contextual dynamics operate to shape leadership. One can image a macro-leadership theory that juxtaposes these two contextual frames to create a contextual dynamic by performance imperative matrix. The cells of this matrix would in turn define the shifting leadership initiatives, actions, processes, and dynamics that contribute to individual and organizational effectiveness.

The recent leadership literature has also included a growing number of conceptual models describing systems and macrolevel leadership (e.g., Hunt & Ropo, 1998a, 1998b; Marion & Uhl-Bien, 2001; Regine & Lewin, 2000). This expansion has provided a greater number of variables to explain and model the process of organizational leadership. This recent growth has important implications for leadership practice. More comprehensive models of leadership can aid a symbiosis with leadership practice by facilitating a more approximate fit between organizational context and the strategies and design of leadership interventions.

2.1.3. Nonprogrammatic past research

Blair and Hunt (1985) note that past leadership research efforts have been generally nonprogrammatic. True advances in a science of leadership require many studies building on

other studies in resolution of a variety of connected conceptual problems. Such a process is also to be guided by common research and conceptual paradigms (Kuhn, 1970). As is true in multiple domains of psychology, relatively unconnected research programs characterize the study of leadership, each exploring in depth, and with considerable sophistication, isolated leadership variables. This issue becomes compounded for leadership research because the topic of leadership cuts across multiple disciplinary domains (note the title of this journal includes the description of it as an *International Journal of Political, Social and Behavioral Science*). Leadership remains the purview, not only of organizational psychologists, but also of researchers in strategic management, human resource management, political science, military science, public administration, economics, and sociology to name a few. Ways of understanding leadership have surfaced in different disciplines with limited if any cross-fertilization. Regarding leadership, Blair and Hunt (1985) argue, “If future research efforts are to be of greater value than those done up to this point, they must be collectively located within a broader and integrative program of research” (p. 273). The same is still true almost 20 years later.

2.1.4. Lack of policy relevance

Blair and Hunt (1985) noted, also, that leadership research has been limited by a lack of relevance for “real-world” policy concerns and problems. We would echo this observation today. Over the past 20 years, researchers have greatly expanded the number of leadership models in the extant literature. As noted and anticipated by Blair and Hunt, this basic research is both necessary and welcome as a way of expanding the number of explanatory variables in leadership and providing greater specification of leadership processes. However, there continues to be a disconnection between this evolution of leadership constructs and the concerns, problems, and changing realities of organizations and their managers.

This is not to place the leadership researcher in the role of reactionary service to the practitioner. Again, as Blair and Hunt (1985) argued, “The issue here is not basic versus applied research, but research (basic or applied) that is or is not relevant to current or projected organizational problems” (p. 275). However, a more comprehensive and systematic theory of leadership can provide the basis for understanding emerging policy concerns and perhaps anticipating them. Indeed, as we detail later in this review, theories of inspirational and transformational leadership have provided a model, albeit limited, of theory that can respond to policy concerns.

Such theories describe the empowering effects of effective leadership on subordinate self-concepts, work motivation, and work behavior (Bass, 1985; Bass & Avolio, 1993; Conger & Kanungo, 1987; House, 1977; Sashkin, 1988; Shamir, House, & Arthur, 1993). These theories provided one basis for understanding problems of leading change and fostering adaptability in the more fast-paced technologically explosive environment of the 1990s to the present. As the Internet became an increasingly common mechanism and vehicle for business, e-leadership, or leadership from a distance mediated through electronic channels grew as a policy concern (Avolio, Kahai, & Dodge, 2000; Zaccaro & Bader, 2003). Transformational leadership models served as the background for understanding how e-leaders can develop trust and effective interactions among unit members who are scattered

spatially and temporally (Avolio et al., 2000). Thus, we have a theoretical framework of leadership that comprehensively models leadership processes within organizations, anticipates changing equilibriums in organizational leadership environments, and provides the basis for addressing policy concerns at a more microlevel of how to lead in new organizational realities.

2.1.5. Limited attention to the conceptual dynamics of leadership practice

We would add to the four pitfalls raised by Blair and Hunt (1985) a concern that leadership researchers have generally neglected conceptual questions of what key dynamics influence the processes and problems of leadership change and leadership interventions. For example, while there have been many studies of leadership development (Baldwin & Padgett, 1994; Conger, 1993; Day, 2000; Day, Zaccaro, & Halpin, in press; Dixon, 1993; London, 2002; McCauley, Moxley, & Van Velsor, 1998; Mumford, Marks, Connelly, Zaccaro, & Reiter-Palmon, 2000), few have explored the dynamics of personal growth and change, especially as they apply within the context of organizational leadership. Recently, Day and Lance (in press) offered a model of leader change that emphasized growth in terms of increases in complexity of thinking, interacting with others, and acting across organizational problems—that is cognitive, social, and behavioral complexity. Day and Lance specifically defined complexity as increased differentiation and integration (Harvey, Hunt, & Schroder, 1961; Hooijberg, Hunt, & Dodge, 1997; Schroder, Driver, & Streufert, 1967). They describe development then as “the purposeful transformation toward higher levels of differentiation and integration simultaneously.”

Differentiation refers to an increasing specification of concepts held in one’s knowledge of the world. Development and cognitive psychologists characterize the beginning of cognitive growth in terms of increased differentiation in schemas, knowledge structures, and ways of understanding (Kegan, 1994; Piaget, 1952). Integration refers to a linking of disparate concepts through higher order abstraction. Differentiation happens first, followed by integration, and, according to Day and Lance (in press), this process is continual or cyclical across a leader’s career span. Day and Lance also link leader development and these notions of cyclical differentiation—and—integration to Kegan’s (1994) developmental model of how humans gain greater awareness, understanding, and consciousness. Finally, they provide a statistical model for studying and analyzing leadership change over time (see also Chan, 1998; Ployhart, Holtz, & Bliese, 2002; Willet & Sayer, 1994, 1996).

This work by Day and Lance (in press) exemplifies an approach to leader development that goes beyond a specification of techniques and strategies of developmental interventions to provide a conceptual basis for understanding why particular interventions may or may not lead to growth. Their arguments would suggest that developmental strategies that (a) prompt increasing differentiation in a leader’s world-view, and (c) promote subsequent integration are likely to be the most effective. Thus, their work provides a basis, for example, of how development work experiences, mentoring, and coaching can foster leadership growth. The central premise of developmental work experiences is to provide challenging work assignments to budding leaders that push them to construct new understandings of more complex operating environments that are likely to characterize future assignments.

McCauley, Eastman, and Ohlott (1995) identified several job components that act as developmental work experiences. These include gaining new functional responsibilities (transitions), having greater responsibility for creating and/or implementing change (creating change), being given assignments that have significant consequences for the organization (high responsibility), placing manager in new positions in which they have to create or cultivate new kinds of relationships and forms of social influence (nonauthority relationships), and placing the manager in change of adversarial crises, or failing situations (obstacles). The purpose of these assignments is to challenge the leader in a way that demonstrates the limitations of his or her skill level for the performance requirements at higher levels of leadership. Such assignments can then motivate some leaders to reinitiate the learning process through more advanced skills and frames of reference.

Along these lines, Lewis and Jacobs (1992) argued that:

Slow and progressive changes in the way a person constructs experience occur not primarily as a result of being taught better ways of making sense of the world, but, instead, in response to directly experiencing the limitations of one's current way of making sense of experience (Kegan, 1982). The heart of managerial development, therefore, should be the planned assignment of high-potential leaders and managers to successively more challenging work roles where a mentor is present who can help the individual better understand the new, more complicated world in which the new manager must now operate (pp. 135–136).

Lewis and Jacobs (1992) also point to the role of mentoring and coaching in this process. The processes of engaging developmental assignments can prompt increased differentiation in budding leaders. Mentoring and coaching may facilitate this process, as well as provide the basis for subsequent integration of the new but distinct concepts. Mentors have the world-view that budding leaders are striving for as they increasing differentiate their own understandings; accordingly, mentors can provide the social and cognitive impetus for their charges to developed more sophisticated mental representations and greater social capital (Day, 2000).

This example provides an excellent case study of how greater conceptual examination of key applied leadership interventions can foster more effective practices. Another example is the work of Shamir et al. (1993) who describe how the followers' self-concepts become engaged and galvanized by the actions of inspirational and visionary leaders. Their work has important implications for understanding the management of change and developing leadership practices that can enhance the effectiveness of change attempts.

Unfortunately, the conceptual examination of leadership practices occurs on a limited basis in the leadership literature. Indeed, regarding mentoring, Day (2000) was prompted to note that “despite its apparent effectiveness at enhancing individual development, formal research has not been published on the topic of senior management exposure. Specifically, *what is it* about interacting with senior managers that sparks the development of more sophisticated perspectives” (p. 594, italics added)? If such research continues to be lacking, then mentoring programs will be more or less theoretically groundless, with a greater likelihood of trial-and-error implementation, and a higher failure rate.

2.2. *Concerns with leadership practices and applications*

Thus far, we have reviewed and expanded Blair and Hunt's (1985) recitation of limitations of prior research efforts. These concerns centered on problems in leadership theory-building and conceptual research. We offer here several concerns that arise from the typical implementation of leadership practices. These are (1) short temporal horizons, (2) parochial focus, (3) fad-driven thinking, and (4) practitioner mistrust for the process and outcomes of basic research.

2.2.1. *Short temporal horizons*

The prescriptive model for basic and conceptual research is to engage in a typically long process of identifying key conceptual problems, developing testable conceptual frameworks, testing central propositions and hypotheses from these frameworks, and replicating findings across a variety of settings and contexts. After such validation of basic principles, an intervention can emerge from a tested conceptual foundation. However, typically, one then needs to test and validate the intervention itself.

Leadership practitioners, who are typically confronted with immediate problems requiring quick solutions, rarely have the time for this protracted process. Accordingly, they seek and employ satisficing solutions that may address a problem sufficiently enough to ease the short-term pressure on the practitioner. However, such solutions rarely provide permanent long-term answers and many practitioners find themselves revisiting a problem further down the road.

This problem is not an easy one to address, because immediate problems and stressors will always override long-term perspectives, except for the most enlightened. Some of the pitfalls of conceptual research noted earlier, particularly the lack of policy relevance and limited attention to the conceptual foundations of leadership applications, exacerbate this problem because they increase the disconnection between conceptual research and practice and make it more difficult for practitioners to uncover appropriate solutions. Thus, addressing the aforementioned concerns with conceptual research may ameliorate the challenge confronting the practitioner.

Leadership practitioners, however, can minimize the problem of short temporal horizons by being more proactive and anticipating the kinds of leadership issues that are likely to emerge in their operating environment. Resources should be devoted to the examining evolving concerns and conducting ongoing research efforts addressing these concerns. The U.S. Army uses such a model to address their emerging leadership issues. Over time, Army policymakers have engaged several examinations of their potential operating environment, projecting each time around 10–20 years in the future. The most recent initiatives were labeled Force XXI, covering a time span up to 2010 and Army After Next, covering the post 2010 time span (Hunt, Dodge, & Wong, 1999). Blair and Hunt (1985) and Phillips and Hunt (1992) describe earlier similar initiatives. Each of these examinations had significant subsequent implications for Army leadership doctrine, and leadership training and development. They allowed policymakers to be more proactive in addressing leadership problems by establishing medium- and long-term research programs, as well as focusing greater human and social capital on the anticipatory resolution of emerging issues.

2.2.2. *Parochial focus*

Another concern, related to the short temporal horizons of practitioners, reflects their relatively parochial focus. The immediacy of problems for practitioners means that they will often eschew larger considerations in developing a comprehensive understanding of leadership concerns. Further, these considerations are likely to be hampered by other immediate concerns such as workflow, other deadlines, and social dynamics within the team. Also, the political and policy concerns of other stakeholders, particularly those superior to the practitioner may play an overriding role how a leadership problem is to be addressed, regardless of any conceptual considerations.

A parochial focus can impeach the integrity and validity of any research that is attempted within the organization, by limiting sample sizes, the amount of time allowed for access to subjects, the kinds of questions that can be asked, and the evaluation of particular interventions. Indeed, it can determine whether such research occurs at all. Further, higher level policymakers may become enamored of particular leadership interventions on the basis of anecdotal evidence and pressure their applications despite insignificant validity evidence. These factors can increase the likelihood of failure, and therefore the disillusionment of practitioners for leadership research.

2.2.3. *Fad-driven thinking*

A common phenomenon and problem in leadership practice concerns undue reliance on popular ideas and fads without sufficient consideration given to the validity of these ideas. Recent examples include the Myers–Briggs Type Indicator (MBTI; McCaulley, 1990; Myers & McCaulley, 1985) and EQ, or emotional intelligence (Goleman, 1995; Salovey & Mayer, 1990). The MBTI was first published as a research tool in 1962, and placed in “applications status” in 1975 (McCaulley, 1990). McCaulley (1990) noted that, as of the late 1980s, users included counselors, educators, religious groups, and, particularly relevant for our theme, by “organizations in business, industry, government, and then military who use it to understand communications, motivation, teamwork, work styles, and *leadership*” (p. 383, italics added). She reports data from over 24,000 leaders across many types of organizations and settings.

Despite the ubiquity of this research, some fundamental questions remain about the validity of the MBTI to predict leadership outcomes. Indeed, McCaulley (1990) offered the following research issues as requiring attention, even after almost 30 years of research on the MBTI:

- Understanding the performance of different types of leaders
- Enhancing performance of subordinates
- Teamwork
- Methodological issues
- Type differences in attitudes toward research itself

These issues and the questions they raise are fundamental to the valid utility of the MBTI in leadership applications. Yet they remain unanswered despite the continued ubiquity of the MBTI in organizations. Further, organizational users and leadership practitioners often operate from the assumption that certain psychological types identified by the MBTI would

make better executives. However, as McCaulley (1990, p. 412) asserts, “From the type perspective, one would not ask the question, ‘What type is the best leader?’ Rather, one would ask, ‘How does each type show leadership?’” Many practitioners not only use instruments such as these with insufficient validity evidence, but also misuse the instruments relative to their intended use, or the use suggested by their conceptual base.

A similar phenomenon has emerged with the recent popularity of emotional intelligence (Goleman, 1995; Goleman, Boyatzis, & McGee, 2002). Such intelligence refers to “the ability to perceive emotions, to access and generate emotions to assist thought, to understand emotions and emotional knowledge, and to regulate emotions reflectively to promote emotional and intellectually growth” (Caruso, Mayer, & Salovey, 2002). Salovey, Mayer, and Caruso (Caruso et al., 2002, pp. 56–59; Mayer & Salovey, 1997; Salovey & Mayer, 1990; Caruso & Wolfe, in press) have defined four distinct skills related to emotional intelligence. These are:

- **Emotion identification:** This refers to skills in identifying and appraising one’s own feelings, as well as the emotional expression of others. It also reflects skills in expressing emotions and distinguishing real and phony emotional expression.
- **Emotion use:** This refers to skill in using emotion to direct attention to important events and environmental cues. It also reflects skills in using emotions in decision making and problem solving.
- **Emotion Understanding:** This refers to skill in understanding emotions within a larger network of causes and meanings, to understand how different emotions in self and others are connected.
- **Emotion Management:** This refers to an ability to stay aware of emotions, and particularly, “the ability to solve emotion-laden problems without necessarily suppressing negative emotions” (Caruso et al., 2002, p. 59).

A recent *Harvard Business Review* article described the influence of emotional intelligence as a concept when it was first introduced:

When managers first started hearing about the concept of emotional intelligence in the 1990s, scales fell from their eyes. The basic message, that effectiveness in organizations is at least as much about EQ as IQ, resonated deeply; it was something that people knew in their guts but that had never before been so well articulated. Most important, the idea held the potential for positive change. Instead of being stuck with the hand they’d been dealt, people could take steps to enhance their emotional intelligence and make themselves more effective in work and personal lives (Druskat & Wolff, 2001, p. 81).

Despite this enthusiasm, only recently have researchers begun to develop the systematic and comprehensive conceptual frameworks for linking leadership to these and similar competencies (Caruso et al., 2002; Caruso & Wolfe, in press; Goleman et al., 2002; Zaccaro, 1999, 2002), and begun the empirical testing necessary for validation (Kobe, Reiter-Palmon, & Rickers, 2001; Sosik & Megerian, 1999; Wong & Law, 2002). The above quote describes

two core beliefs that are prevalent in today's managers, but still without sufficient empirical validation—that emotional intelligence influences organizational and individual effectiveness and that emotional intelligence can be changed and, implicitly, that such change can happen over a relatively short-term. Unfortunately, such beliefs have a disproportionate power to influence leadership practice.

2.2.4. *Practitioner mistrust*

The pitfalls of leadership research and theory building described above serve to distance the leadership theoretician from the practitioner. Likewise, the reliance of the practitioner on models of leadership that have not been sufficiently validated increases the likelihood of failure in practice and therefore heightens questions about what exactly theories and models of leadership can offer the practitioner. Likewise, practitioners who operate from a shorter and more problem-focused time frame than theoreticians may view the demands and requirements of quality empirical research with some chagrin and a degree of skepticism. This skepticism for the timeliness and therefore value of basic research, coupled with their gut-level certainty of ideas drawn from antidotal or “common-sense” leadership experiences can lead practitioners to mistrust the enterprise and outcomes of leadership theory building and testing. This mistrust can further isolate the leadership theoretician and practitioner from one another.

3. Strategies and models for a stronger LTPS

A more effective symbiosis between leadership theory and practice requires a level and quality of interaction between these two constituencies that promotes the interests and goals of each—that is, understanding for the theoretician and problem solving for the practitioner. In this section we explore a number of ideas and models that yield some initial principles for a more effective LTPS.

3.1. *Lewin's action research*

An early systematic effort to integrate theoretical research with practical concerns came from Kurt Lewin and his students. Most likely influenced by his experiences as a refugee escaping Nazi Germany in 1934, Lewin was intensely interested in using science to help resolve social problems (Lewin, 1992). Describing the focus of Lewin and one of his early American students (Alfred Marrow), Festinger (1980) (another early Lewin protégée) (p. viii, italics added) wrote:

By 1942 some people knew what was really happening in Germany and in the areas of Europe occupied by the Germans, facts that the world at large would not be convinced of until 1945. Kurt and Alfred both knew that whatever remnant of European Jewry might survive, a homeland for them was needed. They further know that the Jewish problem was only symptomatic of deep social ills that needed cure, not just alleviation. And they believed that through the pursuit of new knowledge could come the basics for cure. *Action without knowledge is akin to wandering in the dark-ineffective no matter how determined or moral*

the wandering is. To them science, the pursuit of new knowledge, had to be supported in close proximity to action.

Lewin and Marrow established the Research Center for Group Dynamics for the purpose of conducting such “action research,” giving rise to a group of colleagues and researchers who represented “a good proportion of those who build modern social psychology (Festinger, 1980, p. ix).

Action research reflected several defining principles, including reality-based research methods and problem importance. Festinger (1980) noted that a major contribution of Lewin and his action research was to provide experimental and quasi-experimental methods that attempted to reflect the real social dynamics of problems and phenomena, to try and “create, in the laboratory, powerful social situations that made big differences” (p. 239). The goal in such research is to retain the pure nature of a phenomenon without sacrificing that nature for precision. Festinger (1980, p. 239) noted that regarding experimentation, “Precision is highly desirable but only if one has retained the reality and essence of the question.”

The famous Lewin, Lippitt, and White (1939) study of leadership-generated group climates, which examined the effects of democratic, autocratic, and laissez faire leaders on follower actions and outcomes, provides a good example of such research in a controlled laboratory setting. Coch and French’s (1948) study on overcoming resistance to change in manufacturing processes provides another example of such research in a field setting. Both of these studies yielded highly influential legacies in both leadership theory and practice. Lewin et al. (1939) had a major impact on leadership research, predating the leadership style research appearing 10 years later from the research centers at Ohio State University and the University of Michigan. Indeed, this study was a major influence on Ed Fleishman and his classic study of leadership behavior, climate and turnover (Day & Zaccaro, in press; Fleishman, E. A., personal communication, April 13, 2003). Coch and French (1948) and Lewin’s (1947) own work on the “unfreeze–change–refreeze” process contributed significantly to the field of organizational development.

The importance of a problem has two roots that contribute to effective action research (Festinger, 1980). The first reflects the problem’s centrality to the phenomenon being examined. Festinger (1980) describes Lewin and his students’ initial research on group dynamics as being focused on such problems as group cohesion (Back, 1951; French, 1941), pressures toward uniformity (Festinger, Schachter, & Back, 1950; Schachter, 1951), and individual level of aspiration (Festinger, 1942; later extended to groups goals and aspirations; Horwitz, 1954; Zander & Medow, 1963). Each of these constructs related to uncovering and understanding the central dynamics of how effective collective action occurred. Later, these central processes formed the basis for Lewin’s approach to solving problems related to organizational change (Coch & French, 1948; Lewin, 1951), changing food preferences during World War II rationing (Lewin, 1947), and improving intergroup and interracial relationships (Lewin, 1946). Thus, an effective symbiosis between theory and practice is to be grounded in understanding the underlying processes that derive a problem and its parameters. Here, the scientist seeks and offers the knowledge that becomes the basis for deriving the solution.

The second root of problem importance refers to the link between action research and “actual problems in the world, real events, and processes” (Festinger, 1980, p. 239). For Lewin and his students the practical importance of his models of social change resided in the problems then dominating the world milieu in the 1930–1950s. Blair and Hunt (1985) noted that leadership research has suffered from a lack of such policy relevance. An effective LTPS needs to reflect a response to the dominant problems that exist for the practitioner. For example, the highly dynamic and fast-paced operating environment of today’s leaders places a greater premium on understanding how leaders make sense of emerging events, and design and communicate effective collective responses—in other words, how they manage change. Thus, leadership researchers should focus on understanding the central dynamics of change management and be able to provide prescriptions and guidelines to the practitioner as a response of their research. In this way, researchers are responding to real and immediate problems rather than esoteric ones of their choosing.

This emphasis on problem importance suggests in turn that an effective LTPS depends heavily on a close dialogue between practitioner and theoretician. For example, Peters and Robinson (1994) noted that the method of action research means “theory and practice develop together in a series of evolutionary steps designed to lead to improvements in practice during the life of the research project” (p. 122). Bargal, Gold, and Lewin (1992, p. 8) described Lewin’s view of the action research paradigm as involving six processes and principles, several of which reflect or depend upon close interaction between the theoretician and practitioner. These are:

- A cyclical process of planning, action, and evaluation;
- A continuous feedback of the research results to all parties involved, including clients;
- Cooperation between researchers, practitioners, and clients from the start and throughout the entire process;
- Application of the principles that govern social life and group decision making;
- Taking into account differences in value systems and power structures of all of the parties involved in the research;
- Using action research concurrently to solve a problem and to generate new knowledge.

Note that the practitioner is to be closely involved in the research from its earliest stages, and that the values of all parties to the research process are to be considered in the design, and implementation of the research effort, as well as in the distribution of research results. Such collaboration early in the research process can ameliorate several of the issues and concerns noted earlier in this paper, including the lack of policy relevance for the theoretician, and the mistrust of the practitioner for theory-focused research.

3.2. Blair and Hunt’s leadership research agenda

Blair and Hunt (1985) offered a research strategy of leadership research in the U.S. Army that provides another LTPS model and illustrates a process of action research. This model, shown in Fig. 1, has several essential elements. The first is a series of reality

checks that occur throughout a program of research. These checks, occurring between researchers and policy stakeholders, are intended to facilitate the responsiveness of research to policy concerns. The reality checks also are useful in identifying the values, assumptions, concerns, and perspectives of all constituencies in the research and policy-making process.

Thus, like Lewin, Blair and Hunt (1985) point also to the importance of dialogue between researcher and practitioner. We would argue that this is to be a truly collaborative process, in which each partner respects and seeks the perspective of the other. Leadership practitioners provide the problems and policy concerns that require both short- and long-term attention; leadership theoreticians provide the conceptual principles that help define the fundamental processes and dynamics that characterize the problem and its solution. Indeed, in a truly effective symbiosis, the problem and its context help to inform theory or model building, while the constructed model assists in helping practitioners define solution paths and parameters. Accordingly, we offer the following as a proposition:

Proposition 1. *An effective LTPS symbiosis is more likely to emerge when theoreticians and practitioners engage in collaborative dialogue early in the research process, and continue such dialogue through application of discovered conceptual models.*

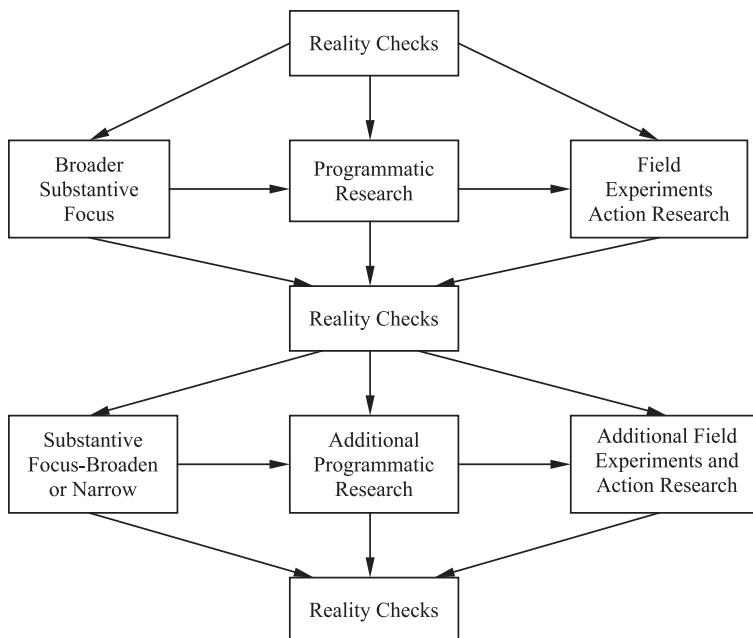


Fig. 1. Blair and Hunt's model of proposed leadership research strategy. (Hunt, J. G., & Blair, J. D. (1985) *Leadership on the Future Battlefield*. p. 281. Washington, DC: Pergamon, Brassey's. Copyright © 1985 by J. G. Hunt and J. D. Blair. Reprinted with permission).

Blair and Hunt (1985) also point to leadership research needing to be both programmatic and of broader substantive focus. They note that prior research has been isolated with little attempt at programmatic integration. Researchers have explored with great skill and precision a variety of leadership problems and processes, but their results and models have not been systematically integrated into an overarching framework. For example, models of inspirational leadership (e.g., Bass, 1985; Burns, 1978; House, 1977) offer significant contributions about how to motivate and empower followers, while functional and situational leadership models (Fiedler, 1964, 1971; Fleishman et al., 1991; House & Mitchell, 1974; Zaccaro, Rittman, & Marks, 2001) provide a number of sophisticated models of how leaders respond to situational contingencies in helping their units to be effective. Much research has been completed in both domains—yet there has been little or no effect centered on programmatically integrating these seemingly disparate perspectives into a single systematic framework.

The recent organizational leadership models proffered by Jacobs and Jaques (1987, 1990, 1991), Hunt (1991), and Zaccaro (2001) offer a means of integrating these different research streams, because they begin with the premise that organizational leadership (1) involves fundamentally the processes of direction setting and operational management, and (2) the nature of these processes changes at different organizational levels. Thus, direction setting is more direct at lower organizational levels, and becomes more diffuse and system-wide at higher echelons. At lower levels, operational management involves more reactive actions in response to emerging short-term problem, while at higher levels, systems management may involve structural and policy changes that reverberate throughout the organization (Katz & Kahn, 1978). Many situational models may explain the dynamics of effective interpersonal or direct leadership, while strategic and inspirational leadership models offer insight into the dynamics of effective organization-wide leadership.

This kind of approach also responds to Blair and Hunt's (1985) concern that future leadership studies have a broader substantive focus, one that uses a wider range of explanatory variables to examine organizational leadership. Leadership behavior reflects the influence of many predictors; yet research programs typically, and out of necessity, focus on a narrow few of these. However, by working within a more integrated conceptual paradigm that incorporates a system-wide multilevel perspective of leadership, the contributions of different research efforts can yield greater overall value.

Finally, the framework offered by Blair and Hunt (1985) advocates that leadership studies utilize a range of methodologies, including field experimentation and qualitative research methods. Most leadership research makes use primarily of survey research methods and laboratory experimentation. While both represent valuable approaches, the former suffers from inherent difficulties in controlling for spurious causes or systematic biases, while the latter often reflects highly artificial settings that make transfer to real leadership environments suspect.

Blair and Hunt (1985) argue for increased use of qualitative research methods that probe more deeply into particular organizational contexts. Such research will often be susceptible to criticism for lack of internal validity, but when coupled with experimentation and survey methods, they can provide a powerful basis for theory building and programmatic hypothesis testing. Indeed, Conger (1998) argued that qualitative research methods “can be the richest of

studies, often illuminating in radically new ways phenomena as complex as leadership. They are responsible for paradigm shifts, insights into the role of context, and longitudinal perspectives that other methods often fail to capture” (p. 107).

Field experiments and quasi-experiments are relatively rare in leadership research, but can be another avenue for an effective LTPS. Such research that uses the parts of an experiment as control groups, random assignment, and timely assessments, but is conducted in actual leadership contexts offers precision that is close to that of laboratory research, and the greater realism of context-driven qualitative and survey research. We would also advocate that longitudinal methods be employed more frequently as a leadership research tool. [Day and Lance \(in press\)](#) describe statistical methods, such as growth modeling, that fit within a longitudinal approach and can track causal processes that emerge over time (see also [Ployhart et al., 2002](#)).

The role of practitioner as research collaborator is critical in using such approaches. Research in field settings will require a point of contact that can facilitate permission for entry into the organization as well as helping to fulfill the requirements for an effective research effort. Yet many practitioners are reluctant to admit scientists into organizational domains for research purposes. As we noted before, practitioners operate from a short time horizon—quality research takes a lot of time. Practitioners are sensitive to the political context—researchers often need to measure outcomes and criteria that could provide uncomfortable information for policymakers. Finally, practitioners have a sense of ownership in their domains that can make it difficult for them to cede the degree of control necessary for quality research.

[Blair and Hunt \(1985\)](#) describe this reaction in the context of research conducted in a military setting:

Local commanders are often unhappy about the involvement of researchers in what the commanders see as their own experiments. On the one hand, researchers usually want to control certain aspects of the change effort so that there are control groups. This is done to ensure that the change effort is constant and can be clearly distinguished from the groups or units which are not changed. Commanders, on the other hand, want to be free to change or fine tune the change effort and to expand it to other groups or units if initial results make it appear that the change is successful (p. 279).

This contrast suggests more reason to promote a collaboration and dialogue early in the research process. If the researcher is brought into the process after the practitioner has already developed a basic design and perspective, resistance to suggestions by the researcher would be natural; likewise, researchers would be more reluctant to enter the process post hoc, because the payoff for knowledge gain and publication would be substantially lower ([Blair & Hunt, 1985](#)). Also, the research effort should reflect an action approach in which an ongoing data stream is generated to inform both the researcher and the practitioner, and space is allowed for changes in leadership practices if results look promising. This approach is particularly central to research that examines leadership and organizational change strategies ([Blair & Hunt, 1985](#)).

3.3. Grounded theory

We have noted that a more effective LTPS can emerge from a program of research that utilizes multiple methodologies, including qualitative approaches. Here we describe one such approach, called grounded theory, which is beginning to appear in the leadership research literature (Hunt & Ropo, 1998a, 1998b; Parry, 1998; Parry & Meindl, 2002).

Researchers utilize the grounded theory method to develop a conceptual framework of a phenomenon from descriptive data gathered using several qualitative methods. They begin within a specific context and used intense observation to gather data—Hunt and Ropo (1998a, 1998b) used General Motors during the tenure of its former CEO, Roger Smith. Gordon (2002) used a government service organization going through change management initiatives. Sookol (1991) used the auditor general of Canada to formulate his theory of vision and leadership. In each instance, data were generated, and theory was constructed, from an intense analysis of single cases.

As we noted, theory emerges inductively from, and is “grounded” in data (Glaser & Strauss, 1967; Hunt & Ropo, 1998b, Parry, 1998). However, researcher often use an overarching paradigm that frames the questions asked to guide observations and the collection of descriptive data. For example, Hunt and Ropo (1998a, 1998b) used Hunt’s (1991) multiple-organizational-level model, which in turn reflected Jacob and Jaques’s (1987, 1990, 1991) Stratified Systems Theory (SST), to develop the frame for conducting their study of Roger Smith. Likewise, Gordon (2002) examined power within dispersed leadership cultures by exploring the existing leadership research and practice literature to uncover central concepts, tensions, and paradoxes. These, in turn, were used as “a priori triggers/guides to focus data collection and analysis” (p. 47).

The derivation of theory happens through a multiple iterative process, called the “constant comparative method of analysis (Glaser & Strauss, 1967; Parry, 1998, p. 89). This process involves collecting data, deriving theoretical relationships among observed variables, comparing emerging findings to prior analyses, and then gathering additional data to clarify/verify inducted models. According to Parry (1998, pp. 89–90):

This process means that concepts and preliminary theoretical ideas emerge out of the data, which prompts further, more purposeful data collection which in turn results in more theoretical work, and so on. During the course of the analysis, working hypotheses are generated. The investigation of these working hypotheses will require the gathering of new data and/or the reinterrogation of existing data. By doing so, concepts can be made clear and abstract, and the relationships between concepts can be confirmed. This process of generating higher levels of theoretical abstraction is called theoretical coding (Glaser, 1978). The result is the identification of basic social process and the generation of an explanatory theory.

Grounded theory is used to identify the basic social processes and dynamics that drive activity within context. Such approaches are singularly qualified to identify the leadership influences that cascade through an organizational context. This highly contextualized method

of generating theory capitalizes on the tacit knowledge and phenomenological experience offered by the practitioner, but organizes data and derives concepts according to the rules of validity and scientific verifiability required by the researcher. Thus, the grounded theory approach appears most suitable to developing an effective LTPS.

We do not mean to exclude more traditional or mainstream approaches from an effective LTPS. Indeed, Parry (1998, p. 88) notes that “a consistent theme running through much recent research methodology literature is that neither qualitative nor quantitative research is clearly better than the other; rather they are complementary.” We would agree, and go further to argue that a process of triangulating different methods and approaches would be most appropriate for the emergence of an effective symbiosis in leadership theory and practice:

Proposition 2. *An effective LTPS is more likely to emerge when researchers utilize both quantitative and qualitative methods, and if the latter is designed to capitalize on the unique contributions of leadership practitioners.*

3.4. An executive leadership research framework

The models presented thus far illustrate mostly processes and strategies for conducting action-oriented research. Zaccaro (2001) offered a model of executive leadership research that specified the essential generic content of a practice-oriented research strategy. This model, shown in Fig. 2, articulates a set of relationships among leader attributes, processes, and outcomes, and argues that leadership practices emerge from research validating these relationships. The model reflects similar approaches in personnel selection research in which the specification of effective job incumbent attributes remains the primary objective.

The characteristics of the leader represent the central link in the executive leadership framework. Leader attributes reflect the primary targets of most leader assessment, selection, training, and development interventions. Thus, they represent the essence of most problems generally faced by leadership practitioners. We note, however, a growing emphasis in the literature on leadership as a process connecting leaders and followers within a larger context.

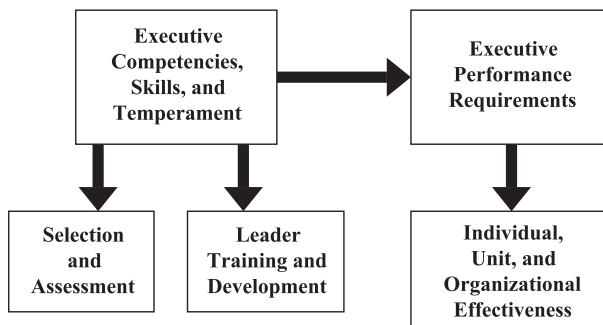


Fig. 2. Executive leadership research model (Zaccaro, 2001, p. 302. The nature of executive leadership: A conceptual and empirical analysis of success. Washington, DC: APA Books. Copyright © 2001 by the American Psychological Association. Adapted with permission.)

Accordingly, some researchers have argued for a perspective of leadership development as an ongoing process that is integrated into daily work and that reflects growing social as well as human capital (Day, 2000; Day & Zaccaro, *in press*; Moxley & O'Connor Wilson, 1998). This broadens the scope of the leader attributes in the model in Fig. 2 to reflect “leadership attributes.”

The other key aspects of the model concern the links connecting leader and leadership attributes with leadership processes and performance requirements; these are linked, in turn, to individual, unit, and organizational effectiveness. Leadership processes refer to the activities of leaders and followers within organizational contexts as they solve organizational problems (Fleishman et al., 1991). They include the social influence processes that flow through organizational contexts, and they include dynamics associated with the management of change. The strong assumption in this model is that such processes have great influence ultimately on organizational effectiveness and success (Zaccaro, 2001).

Leadership practitioners are likely to be most concerned with identifying effective leadership processes, and more importantly, having the tools necessary to assess, select for, train or develop the attributes that facilitate the appropriate display of these processes. However, the successful development of these tools depends heavily on validating the paths linking attributes, processes, and outcomes. Too often in leadership, tools of practice are rarely fully validated to demonstrate that targeted leader and leadership attributes are truly important predictors or leadership processes and outcomes. The results are often failed and short-lived leadership interventions. We would argue that a satisfactory LTPS includes as its fundamental content the specification of leader and leadership attributes that drive the micro- and macrosocial processes and dynamics leading to organizational effectiveness.

Proposition 3. *An effective LTPS derives the tools of leadership practice (e.g., assessment instruments, selection systems, training and development interventions) from a program of research that centers on validating links among leader and leadership attributes, leadership processes and performance requirements, and organizationally important criteria.*

3.5. Dimensions of an LTPS

Our examination to this point suggests that an effective LTPS (1) includes increased dialogue and collaboration between the researcher and the practitioner early and throughout the research process; (2) utilizes a mix of traditional and more contextualized methodologies; and (3) focuses on the delivery of leadership tools that are grounded in validation research linking leadership attributes to leadership processes and outcomes. Thus far, we have focused primarily on the research processes and methodological considerations that can yield a successful LTPS. In this section we explore the generic content that a typical LTPS might contain. Blair and Hunt (1985) offered key themes and an illustrative research strategy for their leader research agenda. Their proposal targeted leader research in the U.S. Army; therefore, they offered more contextualized and very specific research questions. Here, we will offer similar kinds of research questions, but in the form of more abstract dimensions.

We would argue that an effective LTPS incorporates aspects or topics along three dimensions: leadership problems, leadership tools, and leadership theories and concepts. Leadership problems refer to the real problems and concerns that drive the need for research on the part of the practitioner. These problems reflect not vague abstract topics (e.g., how do leaders influence others), but specific issues that have immediate impact (e.g., how do leaders lead multinational teams effectively). Zaccaro and Klimoski (1999) offered a research agenda for the U.S. Army that proposed such problems as how to manage change, how to lead under diversity, how to retain quality officers, and how to develop subordinate human capital more effectively. These kinds of issues are not particular to the Army—they apply to many organizations, and they represent a small sample of potential problems.

The identification of key problems emerges from the early dialogues between researcher and practitioner. A selected problem should not reflect the immediate hot topic that has captured the fancy of a top executive; instead it should refer to a contextualized leadership process that poses significant conceptual challenges and that when resolved can provide short- and long-term practical gain. In today's dynamic operating environment, the organizational context changes often and present new challenges about how to practice effective leadership. The specification of problems resides mostly in these new challenges and what they could mean for organizational leadership.

For example, the technology revolution of the last 10–15 years has produced organizational forms in which leaders are often leading units whose members are scattered spatially and temporally. Communications and interactions occur among such members primarily through electronic channels. Thus, these teams have been labeled “virtual teams” or “e-teams” (Kristof, Brown, Sims, & Smith, 1995; Oakley, 1998; Townsend, DeMarie, & Hendrickson, 1998; Zaccaro, Ardison, & Orvis, *in press*; Zaccaro & Bader, 2003). These organizational forms argue for new leadership attributes and changes in how leadership is to be practiced, with corresponding changes in the selection, training and development of e-leaders (Avolio et al., 2000; Zaccaro & Bader, 2003; Zaccaro, Kemp, & Bader, *in press*).

Accordingly, understanding the unique characteristics of e-leadership, and selecting for or developing effective e-leaders exemplifies a kind of problem that can be the focal point of an effective LTPS. We suggest the following as other examples of problems that can energize an LTPS:

- What are the unique challenges of leading multinational and global teams;
- How do leaders make decisions in today's high-paced technological and overwhelmingly data-rich environment;
- What are the leadership attributes associated with managing change effectively; how do these attributes and change processes vary at different organizational levels;
- What are the essential dynamics of effective leader development; how do these dynamics change at multiple organizational levels;

The second dimension of the LTPS model refers to leadership theories and concepts. When confronted with a problem, leadership researchers have the key role of identifying the particular contextual elements that moderate the practice of leadership, and providing the

conceptual basis for practical interventions. In essence, they provide or construct the theory of the problem that becomes the basis for developing a greater understanding of changing leader dynamics, and for specifying ways of responding to changing contextual elements.

We noted earlier how the changing technological environment for today's organizations, and the increasing use of e-teams, poses the problem of how to lead such teams, i.e., the processes and challenges of e-leadership. Avolio et al. (2000) used adaptive structuration theory to understand and define how organizational structure and technology influence one another. They proposed that emerging organizational structures, and the sources of these structures (e.g., tasks, environmental features, group properties) influence several dimensions of social processes within organizations. These processes, in turn, contribute additional sources and influences on emerging structure. Avolio et al. then used this basic framework to elaborate the leadership processes involved in the adaptation to new technology, how leadership and technology coevolve within an organization, and how leaders appropriate and incorporate new technology into organizational structures and processes. These appropriations have considerable meaning for the dynamics of leadership, and of leader–follower relationships. Avolio et al. use other theories, such as transformational leadership theory (Bass, 1985, 1996; Bass & Avolio, 1990, 1993), to describe and understand these dynamics.

The further specification of this model and theoretical framework is beyond the scope of this article, and we refer the reader to Avolio et al. (2000) for additional details. However, we present this research as an excellent example of how theoretical concepts are used to define the essential conceptual parameters that characterize a particular problem, in this case how leaders evolve the use technology to lead teams and units mostly over electronic channels. While the range of particular leadership theories and concepts can be quite broad, we suspect that most conceptual frameworks would center on some fundamental issues in leadership.

The model in Fig. 2 suggests that the above would include:

- How do central leader–follower dynamics, or fundamental leadership processes, change as contextual elements change in the organization's operating environment?
- What are the group and organizational properties that change as a function of altered operating conditions; how do these changing properties influence leadership performance requirements?
- What are the relationships between these changing processes and organizational outcomes; what contextual factors moderate these relationships?
- What are the key dimensions of organizational structure, climate and effectiveness that are changing as a result of altered operating environments; how do leadership elements interact with these key dimensions?
- What are the leader and leadership attributes that become more or less prominent as the relationships between certain leadership processes and organizational effectiveness change?

The third dimension of an effective LTPS refers to the tools and interventions that emerge from the application of conceptual frames to problems. For the practitioner, this aspect represents the key benefit to the symbiosis. For the LTPS symbiosis to be effective and productive, it must yield not only conceptual understanding about a problem, but also

practices that help organizations resolve the leadership issues raised by a problem. For example, Avolio et al. (2000) focused on the use of Advanced Information Technology (AIT) as the fundamental tools of e-leadership.

These offers offered the following regarding AIT: Advanced Information Technology is defined as tools techniques, and knowledge that enable multiparty participation in organizational and inter-organizational activities through sophisticated collection processing, management, retrieval, transmission, and display of data and knowledge (DeSanctis & Poole, 1994). Advanced Information Technology includes, but it not restricted to, e-mail systems, message boards, and collaborative customer relationship management and supply-chain management systems. These technologies can help leaders scan, plan, decide, disseminate, and control information (p. 616).

Avolio et al. (2000) integrated AIT with adaptive structuration theory to explore leadership processes within an e-environment. They go on to examine the use of a specific tool, group support systems (GSS), in the practice of leadership, providing an extensive summary of research on such uses. Again a full description of this research and the premises of Avolio et al. is beyond the scope of this review, and we refer the reader to that article. However, their work serves as a strong example of how problems (e-leadership), theoretical concepts (adaptive structuration theory; transformational leadership theory) and leadership tools (AIT, GSS) are integrated to form an effective theory–practice symbiosis. Accordingly, we offer the following proposition:

Proposition 4. *An effective LTPS is one that integrates a central problem with relevant conceptual models and constructs, and yield practical interventions that address issues raised by the problematic.*

In line with Proposition 1, the problem should emerge from ongoing dialogues between researcher and practitioners. In line with Proposition 2, theory and model building should be grounded in a range of quantitative and qualitative methodologies. And in line with Proposition 3, the tools of leadership should derive from validation research that links leader and leadership attributes with leadership processes and performance requirements that drive organizational effectiveness. Such tools would include the following:

- Leadership process aids (such as group support systems)
- Leader selection systems
- Leadership training and development systems
- Assessment systems for measuring unit and organizational effectiveness
- Assessment systems for measuring leadership and followership processes
- Assessment systems for measuring leader, leadership, followership, unit and organizational attributes.

We have cited the research on e-leadership as one example of how an effective LTPS can emerge. In this final section, we describe two other examples from the leadership literature that offer similar symbioses between theory and practice.

4. Some examples of effective LTPS

We have selected, as LTPS examples, two programs of research that address key problematics in organizational leadership, provide theoretical frameworks and new ways of understanding leadership, and offer as byproducts a range of tools and interventions that have as their goal the facilitation of leadership practices. These research programs also reflected a range of quantitative and qualitative research methodologies as well as ongoing dialogues between the researchers and various leaders and leadership practitioners. Our examples include the Center for Creative Leadership's research on managerial derailment, and the development of SST. For each example, we indicate the problem being addressed, the conceptual frames developed to understand the problem, the research strategies used to develop and validate the conceptual frames, the findings of these studies, and the tools that emerged from the research program.

4.1. *Center for creative leadership: managerial derailment*

4.1.1. *Problem*

The Center for Creative Leadership (CCL) has completed a number of studies examining how executive develop and grow over the course of their career (Kaplan, Drath, & Kofodimos, 1985; Kofodimos, 1989; McCall & Lombardo, 1983; McCall, Lombardo, & Morrison, 1988; Morrison, White, & Van Velsor, 1987). A central topic in this line of research referred to the problem of executives who were on a fast track to the successful attainment of top positions, but failed to reach these positions—that is, they derailed before becoming successful top executives. Lombardo and Eichinger (1989) estimated that up to 50% of high potential managers derail in their career track. This research line sought to identify the factors the caused derailment, and to provide strategies for avoiding derailment.

4.1.2. *Theory*

McCall and Lombardo (1983) and Lombardo and Eichinger (1989) identified several consistent characteristics that can derail rising managers and leaders. These are:

- Difficulty in molding a staff
- Difficulty in making strategic transitions
- Lack of follow through
- Poor treatment of others
- Overdependence
- Disagreements with higher management about how the business should be run or about strategy.

Lombardo and Eichinger (1989) described a process of derailment in which strengths exhibited early in one's career can actually lead to problems and weaknesses as performance requirements change and become more challenging. For example, a young manager or leader who is highly ambitious, has high standards, and is tough on subordinates and peers who do

not maintain similar standards may be viewed as having high potential. However, latent issues exist pertaining to the manager's abrasiveness and style as well as his or her ability to maximize effort from others and to empower them. As such managers begin to be exposed to work assignments that require high levels of interpersonal effectiveness, building and maintaining relationships and developing trust, their previous strengths can become significant hindrances. Lombardo and Eichinger describe similar processes for each of the other derailment factors.

The conceptual model in this research effort contained several core ideas. First, the attributes that facilitate rapid success early in one's career can hinder performance when that executive needs to confront performance requirements more typically of higher level, and more complex, leadership positions. That is, early strengths can become later weaknesses. Thus, this research provides the conceptual principle that key leader attributes predicting performance change as leaders ascend organizational levels. This principle has also been central to several theories of multilevel leadership (Hunt, 1991; Jacobs & Jaques, 1987, 1990, 1991; Zaccaro, 2001). Second, this research effort also identified the core attributes that increased the likelihood of derailment. These included personal qualities such as emotional instability, defensiveness, low interpersonal skills, and narrow technical skill.

Finally, the derailment research was linked to investigations of whether developmental interventions could prevent derailment and facilitate growth across an executive's career. Two conceptual principles grounded these developmental interventions. The first reflected self-awareness of managerial strengths and weaknesses, acceptance of existing flaws, and a motivation to address potential derailment factors. The second referred to the kinds of developmental work assignments that facilitate growth in the careers of rising executives (McCauley et al., 1995). CCL researchers have examined these principles and developed models of how they relate to successful executive development (McCauley et al., 1998).

4.1.3. Research strategies and findings

As a set, the studies conducted by CCL researchers to investigate managerial derailment used a mix of qualitative and quantitative methods. McCall and Lombardo (1983) interviewed executives and senior human resource managers to identify 20 successful managers and 21 managers who derailed. They sought in these interviews to understand what predicted early success, what predicted later derailment, what were the key events that triggered derailment and how did derailers differ from those who succeeded. Conducting a qualitative analysis of their interview data, McCall and Lombardo found that executives who derailed had strengths that eventually became weaknesses as performance requirements changed, had deficiencies that were significantly instrumental in failing to address new performance requirements, let past success blind them to the challenges of new learning situations, and, in a few cases, were victims of events beyond their control.

McCauley & Lombardo (1990) reported on the development of a survey, called Benchmarks that was designed to assess factors that predicted managerial success and factors that predicted derailment. The derailment scales included problems with interpersonal relationships, difficulty in molding a staff, difficulty in making strategic transitions, lack of follow-through, overdependence, and strategic differences with management. They found that in a

sample of 336 managers, all but the last scale were negatively correlated with superiors' assessments of promotability. In another sample of 253 managers, three of the six scales predicted subsequent failure to be promoted. McCauley & Lombardo used their data from several studies to refine their model and suggest three important clusters of managerial behaviors that predicted success or derailment: Respect for self and others, adaptability, and molding a team.

4.1.4. Emergent tools

The research by CCL has produced a number of tools and leadership interventions. First, the instrument used to measure derailment factors, Benchmarks, has been widely used in research and in consulting. The latest version of the scale assesses several success factors and five derailment factors—problems with interpersonal relationships, difficulty building and leading a team, difficulty changing or adapting, failure to meet business objectives, and too narrow functional orientation. CCL also offers a number of practice-oriented guides to help managers and practitioners grow and avoid derailment processes (Browning & VanVelsor, 1999; Lombardo & Eichinger, 1989; McCauley et al., 1998). Finally, CCL has offered a range of leadership development programs for managers and executives that help them address a variety of developmental needs and issues. Two of them, The Leadership Development Program (LDP), and The Looking Glass Experience (LGE) contain sections that specifically address managerial derailment.

4.1.5. Summary

As recommended in Proposition 1, the CCL research program on managerial derailment was grounded in early interviews and dialogues among researchers, leaders, and practitioners. The ongoing research and workshops with executives provided the basis for continued dialogue. The use of both interviews and survey data illustrates Proposition 2 that a mix of quantitative and qualitative methods would contribute to an effective LTPS. While the qualitative methods did not reflect the use of grounded theory strategies, subsequent iterations of data analysis from interviews contributed to theory building and revision. In line with Proposition 3, the research reported by McCauley & Lombardo (1990), that forms the basis for the use of Benchmarks, provided data validating the linkages among leader attributes, leadership processes, and some leadership outcomes. Finally, illustrating the summary Proposition 4, CCL's derailment research program addressed a central problem, provided a range of conceptual models and constructs, and resulted in the development of several widely used and influential leadership tools, assessment instruments, and development interventions. Thus, this program illustrates an effective LTPS.

4.2. Stratified systems theory

4.2.1. Problem

Stratified Systems theory (SST) sought to address how leader performance requirements change at different organizational levels, and therefore, how leader attributes, particularly conceptual capacities, change in corresponding ways. The central problem, then, rests on how

to select and/or develop leaders as they ascend through the organizational hierarchy (Jaques, 1986, 1989; Jacobs & Jaques, 1987, 1990, 1991; Jacobs & Lewis, 1992).

4.2.2. Theory

SST defined as a critical requirement of leader direction setting at all organizational levels, the provision by the leader of a frame of reference for collective action. This frame of reference represents “a cognitive representation of the elements and events that comprise the operational environment within which leadership occurs” (Zaccaro, 2001, p. 25). Such a frame provides the basis for the leader making sense of patterns in his or her environment and providing a rationale for the direction articulated to followers.

Jacobs and Jaques (1987) and Jacobs and Lewis (1992) argued that because the environments faced by leaders ascending organizational levels become increasingly complex, their frames of reference need to correspond to the complexity of the operating environment being patterned. Thus, the frames of reference or causal maps developed by senior leaders will need to be more differentiated and integrated than those of leaders at lower organizational levels. This requirement also suggests that as leaders move to upper levels of an organization they need more higher order cognitive skills and capabilities to succeed.

Jacobs and Jaques (1987, 1990, 1991) also offered a hierarchical classification or stratification of organizational leadership requirements, where performance demands were specified as changing qualitatively at particular points in the organizational structure. Their model contains three general layers, reflecting three functional domains (Katz & Kahn, 1978), and incorporating seven strata. Each layer and strata represents a requirement that leaders operate within environments characterized by increasing social and informational complexity (Zaccaro, 2001), and direction setting reflects a longer time span. Time span refers to the maximum time horizon for tasks that require leadership and decision making at any particular organizational level. The lowest functional domain is the production domain, composed of three strata. Here, leadership is characterized as involving direct and small group interaction, where tasks are fairly concrete. The time frames in this domain extend from immediate (stratum 1) to 1–2 years (stratum 3).

The next functional domain is the organizational domain, composed of two strata. At this level leaders are beginning to be tasked with the requirement to provide more comprehensive frames of reference that pattern elements of the external environment for an organization as a whole. Such leaders are also beginning to coordinate and integrate the activities of multiple subunits, and are likely to be supervising other supervisors. The time span of work can range from 4 years (stratum 4) to 10 years (stratum 5). The scope of work can also include a number of small departments (stratum 4) to a small company (stratum 5).

Jacobs and Jaques (1987) defined senior leadership or executive work as occurring in the systems functional domain. Here, leaders are developing new organizational structures, new business units and new organization-wide policies. Thus, they note that for such leaders,

The primary business at the systems level lies in two areas. One is interaction with [the] external environment, both impacting on it and getting and interpreting information from it to produce a more rational (stable) environment within which subordinate companies can

operate. The second is creating critical resources masses, that is, fiscal, raw materials, personnel, technological, and favorable public and/or political opinion, for future ventures (p. 25).

The time span of work and decision-making at the systems level can range from 10–20 years (stratum 6) to 20–50 years (stratum 7). Also the scope of work encompasses the entire organization.

SST offers a model of changing leadership performance requirements across organizational levels, and an argument that the cognitive capacities of leaders need to correspond to the complexity of their changing operational environment. This framework, then, provides the rationale for developing executive assessment and selection tools. It also defines in part the appropriate content for executive training and development interventions.

4.2.3. *Research strategies and findings*

SST has been used extensively to examine leadership in the U.S. Army. Indeed, Zaccaro (1996) reported from an annotated bibliography of Army executive leadership research from 1985–1995, that 26 studies were explicitly or indirectly linked to SST. Other studies investigating SST were conducted in different organizational settings and their results compared to those from the Army (Jaques, 1986, 1990).

This body of research utilized a range of methodologies. One study (Barber & Jacobs, 1993) described the proceedings from a conference devoted to exploring (a) the operating environment and performance requirements for strategic leaders in the Army, (b) the competencies and leader attributes associated with effectiveness in the operating environment, and (c) the most effective ways of developing these attributes. Several other studies involved structured interviews with Army general officers at various levels to assess hypotheses derived from SST (Harris & Lucas, 1991; Jaques, Clement, Rigby, & Jacobs, 1986; Lucas & Markessini, 1993; Markessini, 1991). Similar research was completed with senior Army civilian executives (Markessini, Lucas, Chandler, & Jacobs, 1994). Thus, frequent dialogues among research and leadership stakeholders occurred throughout the research process.

These studies supported a number of predictions derived from SST. For example, Lucas and Markessini (1993) reported that the percentage of general officers who stated that long term planning was important in their work rose from 25% for one-star officers to 40% for two-star officers, 63.6% for three-star officers, and 87.5% for four-star officers, supporting the increasing complexity of work proposed by SST.

Lucas and Markessini (1993) also content analyzed the interview data and scored each general officer for his (a) task planning time span, and (b) the time horizon that he could envision future events (called “performance capability”), and again reported greater work complexity at higher levels. Markessini et al. (1994) reported an even more fine-grained analysis of work time span for ES and SES civilian executives and found similar differences. One important outcome of this qualitative research was to help define more clearly the meaning of work and time span in SST (Zaccaro, 1996). Thus, similar to the process of grounded theory, qualitative data were used to test and revise theoretical postulates.

Taken together, this body of work found that compared to lower level managers, executives were “required to (a) operate within relatively longer time frame, (b) be more involved in organizational policymaking, (c) interact more frequently with external constituencies, (d) engage in more network development and network building, and (e) develop more complex cognitive maps than lower level leaders” (Zaccaro, 1996, p. 101). Thus, this research supports and extends several postulates from SST. Further, the findings of this research were supported by quantitative and survey studies (Jaques, 1990; Jaques & Stamp, 1990).

4.2.4. *Emergent tools*

The research program sponsored by the U.S. Army included the development assessment instruments designed to measure capacities associated with effective executive leadership. For example, Stamp (1988) developed a measure of cognitive power, called the Career Path Appreciation technique that uses an interview methodology, combining three separate assessment tasks, to identify an individual’s current level of conceptual capacity. Then, based on this score, the assessee’s age, and maturation curves developed by Jaques (1986), a prediction is made of an individual’s maximum attainable level of capacity and work level. Thus, the CPA produces an index of both current and potential cognitive work capacity. Stamp (1988) reported that the correlations between predicted and actual attained work levels found in various samples ranged from .70 to .92. Lewis (1995) found in a sample of Army War College students that CPA scores were significantly correlated with breadth of perspective, strategic thinking skill, and general officer potential (correlations ranged from .23 to .57).

These studies provide support for the utility of this instrument in leadership and executive assessment. Indeed, versions of these measures have been used at several Army training schools, including Army War College and National Defense University (Lewis, 1995; McGee, Jacobs, Kilcullan, & Barber, 1999). Army-sponsored researchers also developed a survey instrument to assess leader capacities (Industrial College of the Armed Forces [ICAF], 1994). This instrument, called the Strategic Leader Development Inventory (SLDI), assessed leader attributes suggested not only by SST, but also by Kegan’s (1982) stage theory of adult maturation, and the derailment research by McCall & Lombardo (1983). Thus, this research program has produced both qualitative and quantitative assessment instruments for measuring leader capacities.

SST has also resulted in a number of training products and tools used in Army leader development programs and schools (ICAF, 1997; Stewart, Archer, Barber, Tuddenbaum, & Jacobs, 1993; U.S. Army War College, 1998; Zsombok, 1993; Zsombok, Klein, Kyne, & Klinger, 1992). Further, conceptual principles from SST have been adopted as part of Army training doctrine (U.S. Army, 1987, 1990, 1993). Thus, the practical utility and impact of this research program has extended beyond the production of leader assessment tools.

4.2.5. *Summary*

The research program on SST, like the CCL research program on derailment, exemplifies the propositions offered earlier on effective LTPS. The development, validation, and modification of theory were grounded in a dialogue among researchers, leaders, and

practitioners. The validating research used a range of methods, including both qualitative and quantitative strategies. As suggested by Proposition 3, the central focus on the validation research was to examine and test hypothesized linkages among leader competencies, leadership processes and performance requirements, and leadership outcomes. Finally, the research program addressed a key problematic (how to select or develop executives over a career span), offered several conceptual frames for approaching this problem, and provided a range of assessment and training tools that have been widely used in the Army leadership community. Thus, the research program on SST provides another example of an effective LTPS.

5. Summary

In spite of a long history of leadership research and an even longer interest in leadership practice (indeed, both Aristotle and Plato offered suggestions, respectively, about leadership development and selection, Zaccaro et al., *in press*), the research and practice communities remain too far apart in terms of addressing leadership problems with strong leadership concepts. We have sought to highlight the particular barriers on each constituency that constraint an effective symbiosis between leadership theory and leadership practice. We have offered a number of propositions and guidelines that we hope can break through these barriers. Finally, we have offered two cases of effective LTPS as examples and models for such integrative research efforts.

The effective integration of leadership theory and practice needs to be grounded in an ongoing dialogue between researchers and practitioners that respects the values, perspectives, and agendas of each constituency. Such dialogue is often difficult to achieve because researchers and practitioners do not engage each other all that often. And when they do engage, members of each group can rarely put aside their own frames of reference to view leadership from the frame of the other group. Thus, dialogue needed for an effective symbiosis founders at its inception. If such interaction and dialogue can begin to be effective, then we suspect that the leadership community (as a whole) will begin to experience more problems that are informed by concepts, and more theories that molded by contextual realities. The gap between leadership theory and practice should, in turn, begin to narrow to a close.

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