



# The Situational Leadership Model

## Learning Outcomes

By the end of this unit the learner will be able to:

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## About Leadership

There are several very strong models for leadership which have been developed after many years of study, and with the help of many companies and their leaders. All of these models share some things in common that we can certainly learn from in our own quest to become the best leaders that we can be. Whether you have “leader” in your job title or you are a leader without a team, developing the characteristics of strong leaders will help you in your work.

First, let’s explore what kind of a leader that you are. In the work done by Paul Hersey and Ken Blanchard on the Situational Leadership II® model, they recognize four leadership styles that tend to resonate with us. As you read about the different styles, think about where your comfort zone is.

## Director’s Style

Someone with a director’s style does well with new employees, who seem to easily respond to being told what is expected, having processes and procedures outlined for them, and having someone they can report to or ask questions of regularly. The director’s style is defined by a high emphasis on directing tasks and being able to account for results.

## Coach’s Style

Coaches are able to blend supporting people and directing tasks. This is available to a leader when employees understand what is expected, but need some range of support in order to take independent steps and make things happen. A coach’s style has a high degree of involvement in directing tasks, with an equally high emphasis on supporting people.

## Supporter’s Style

This style encourages people to come up with solutions and solve problems on their own. It provides them with the support they need in terms of tools and resources. The supporting style shows a low degree of directing tasks and a high emphasis on supporting people.

## Delegator’s Style

Delegating means that the delegator holds responsibility for results, but that the work is done by others. We delegate to individuals who have high levels of related skill and the experience it takes to locate their resources and tools. Then they can report to the delegator at defined intervals. This style has a low emphasis on directing tasks, and an equally low emphasis on providing people support.

## Test your knowledge

## Understanding Your Comfort Zone

Where is your comfort level at the following times?

**With your current direct reports (or, if you have no direct reports, colleagues, committee members, etc.)?**

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**With one staff member you may be having problems managing?**

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**On a project you are currently a part of?**

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## Our Comfort Zone

We all have a comfort and ease with one style, but there are times when staff performance, our own confidence, or a crisis demands that we behave differently.

When new people join the team, they understandably will need a level of **direction** that can be quite high and will leave little time for supporting people. As they gain skill and confidence, the leader can progress to a **coaching** style where they are still directing tasks but also able to offer additional support. As the employee makes progress, the leader provides more support and less hands-on direction until the direct report has the ability to accept delegated tasks.

## The Cyclical Process

This process can be cyclical. For example, a team that you can easily delegate to might go through a significant change or have a new system being implemented. You might have to start again with directing behavior before moving on to coaching, supporting, and then a return to delegating.



We also might encounter structures that do not allow us to delegate, which can be a tough job for someone who is a capable and effective delegator.

## What's Your Type? How About Mine?

### Assessing Your Preferences

Now that we have an understanding of the ways that we can lead, let's explore our individual characteristics. There are many ways to discuss the personality types of people that we work and play with. Whether you use initials like the MBTI (Myers-Briggs Type Indicator), colors like Personality Dimensions, edutainment like True Colors, the names of animals, or Greek philosophers, the idea is that there are base temperaments that we can relate to, and that we prefer. The science behind this kind of assessment relates back to the work of Carl Jung. It has been substantiated through tens of thousands of people who have completed and validated questionnaires.

If you have ever wondered what type of person – or temperament – makes the best type of leader, the answer may surprise you. It's not necessarily the person that achieves the greatest success (however you define that), nor is it necessarily the person with the greatest communication skills. The keys to being the best type of leader have to do with many things, including the way you approach work and life, and also in having a strong team that can offer a range of strengths.

Some people seem to be natural leaders with an enviable track record and lots of people turning to them for advice and mentorship. Others seem to have to work at it, and are constantly looking to the world for learning and working on developing their skills. In reality, all leaders need to work at something, because one strength of a leader is their continuing drive to learn.

## Identifying Your Characteristics and Preferences

We have developed an assessment that can help you identify what your base temperament is. First, look at each group of words. For each group, decide which of the four choices is most like you, a lot like you, somewhat like you, and least like you. It's important to answer the questions according to what feels right, and not what you think people think about you, or may expect.

First, select the choice that is most like you and write the number 4 on the line. Then select the term that is a lot like you and write number 3 on the line, then 2, and then 1. You have to use the numbers 4,3,2,1 in each section. There are no ties allowed, so you need to make a decision on each group. You can see an example below.

Remember that you are working on preferences and not a math exam, so don't get overly tied up in absolute definitions. When you are finished the questionnaire, follow the instructions on the scoring sheet.

### Example

#### Scale

- 4 = Most like you
- 3 = A lot like you
- 2 = Somewhat like you
- 1 = Least like you

#### Terms

1. A driving need for you is:

<b>3</b>	C	To find meaning in life
<b>4</b>	A	To learn and gain knowledge
<b>2</b>	B	To belong
<b>1</b>	D	Freedom to do what you want

#### Questionnaire

1. A driving need for you is:

	C	To find meaning in life
	A	To learn and gain knowledge
	B	To belong

D Freedom to do what you want

2. A primary need for you is:

- D Making an impact
- A Maintaining calm
- C Relationships
- B Responsibility and duty

3. Which of these things interests you?

- C People
- A Ideas
- B Information
- D Actions

4. You respect:

- B Authority
- A Intellect
- D Performance
- C Relationships

5. You:

- C Stick up for what you believe
- D Are constantly busy
- A Look to the future
- B Like to provide for others

6. You like:

- A Exploring
- B Security
- C Cooperation
- D Seizing opportunities

7. You're good at:

- D Making quick decisions
- B Looking after details
- C Inspiring others
- A Solving complicated problems

8. You want:

- D Variety
- A Logic
- C Harmony
- B Stability

9. You prefer to focus on:

- B Structure
- C Relationships
- D Action
- A Knowledge

10. You value:

- D Action
- B Security

- |                          |   |                  |
|--------------------------|---|------------------|
| <input type="checkbox"/> | C | Self-improvement |
| <input type="checkbox"/> | A | Intelligence     |

11. You make decisions by relying on:

- |                          |   |           |
|--------------------------|---|-----------|
| <input type="checkbox"/> | C | Intuition |
| <input type="checkbox"/> | D | Senses    |
| <input type="checkbox"/> | A | Data      |
| <input type="checkbox"/> | B | Tradition |

12. You enjoy:

- |                          |   |                         |
|--------------------------|---|-------------------------|
| <input type="checkbox"/> | D | Adventure               |
| <input type="checkbox"/> | B | Social gatherings       |
| <input type="checkbox"/> | C | Meaningful interactions |
| <input type="checkbox"/> | A | Theories and data       |

13. Your work stressors are:

- |                          |   |              |
|--------------------------|---|--------------|
| <input type="checkbox"/> | D | Inefficiency |
| <input type="checkbox"/> | C | Boredom      |
| <input type="checkbox"/> | B | Injustice    |
| <input type="checkbox"/> | A | Not knowing  |

14. You appreciate:

- |                          |   |                                  |
|--------------------------|---|----------------------------------|
| <input type="checkbox"/> | C | Skilled performance              |
| <input type="checkbox"/> | A | Research and investigation       |
| <input type="checkbox"/> | B | Cooperative interaction          |
| <input type="checkbox"/> | D | Respect for policy and tradition |

15. Your leadership style is:

	D Firm, fair, respectful
	C Relaxed, flexible, open
	B Patient, supportive, encouraging
	A Logical, inspirational, direct

### Scoring Example

Add the total number of points that you wrote beside each letter of the alphabet in the questionnaire. Pay close attention, since the letters above are not always in order!

In our sample at the beginning of the questionnaire, we would add 4 points to the A column, 2 points to the B column, 3 points to the C column, and 1 to the D column.

<b>A</b>	I III
<b>B</b>	II
<b>C</b>	I II
<b>D</b>	I

### Your Score

<b>A</b>	
<b>B</b>	
<b>C</b>	
<b>D</b>	

Total A's \_\_\_\_\_ Total B's \_\_\_\_\_ Total C's \_\_\_\_\_ Total D's \_\_\_\_\_

The letter with the highest total is most like you. Write it here: \_\_\_\_\_

The other letters are your next preferred styles. If your numbers are close to each other (within 5 points), you probably find it pretty easy to flex your style to those other categories. If your numbers are far apart, or one is much lower than the others, that is the area you will find it challenging to work within. You'll have the knowledge of how to do it once you work through the material in the next unit.

## What Does it Mean To Have a Number?

In reality, we are a blend of all types, moving within the numbers and flexing into the other styles as our circumstances and our comfort levels dictate. This means that we are more like a blended drink than distinct ingredients. For example, you may recognize that you may behave one way at work (super organized), usually be more relaxed at home, but return to your super organized self when stress at home increases.

As you read the descriptions below, see if they agree with how you behave as a leader. You'll also get some insight into how to connect with the different types in the descriptions.

### Mostly A's – Inquiring Rationals

Inquiring Rationals are often **drawn to jobs like banking and engineering**. They like to figure out how things work. They consider the structure and configuration of things. They process information intuitively and look at the big picture. These are visionaries, like Albert Einstein and Bill Gates. When it is time to make decisions, they apply logic, and they don't get persuaded by emotions. If they don't respect you, you won't keep their attention. Experience and competency are very important to Inquiring Rationals.

This temperament profile makes up approximately **5 to 7% of the population**. Other notables in this group are Walt Disney, Ben Franklin, Margaret Thatcher, and Napoleon.

**To connect with Inquiring Rationalson your team**, demonstrate your expertise. Quote experts and remember to cite your sources. When speaking with them, get to the point quickly. To keep their attention, use facts and figures first and personal stories later.

**As a leader**, you probably enjoy being in charge. One of your strengths is in making good decisions that have been well analyzed, researched, and considered. This allows you to keep on top of things that you also enjoy, like tracking deadlines and benchmarks. You may reach your decisions, however, without much consideration to people's feelings or the morale of the group. You may get frustrated with people who forget details or who want to do things differently. Once people see how much you care, they will learn to appreciate and respect you, and they will respond to your commitment to help them grow and learn.

### People usually describe Inquiring Rationals as:

- Dependable
- Systematic
- Proficient
- Efficient
- Practical

### Sometimes they are also:

- Shortsighted
- Data-bound
- Perfectionistic

- Narrow-minded
- Cautious

### **Mostly B's – Authentic Idealists**

Authentic Idealists are **natural teachers, counselors, and leaders**. They are people who enjoy being around other people. They have excellent communication abilities. They are benevolent and intuitive, and they focus on global issues like world poverty and humanitarian issues. Idealists love metaphors, stories, and symbols, rather than statistics and figures. They make decisions that reflect their values, and rely on emotion and instinct as opposed to logic. In fact, statistics and facts bore them. They are looking for significance, and they seek the truth.

The Authentic Idealist temperament makes up about **10% of the population**. Notable members of this group include Eleanor Roosevelt, Billy Graham, Mahatma Gandhi, Jane Goodall, Oprah Winfrey, and Albert Schweitzer.

**To connect with the Authentic Idealists in your organization**, share your values and personal convictions. Be authentic and reach out to them by telling stories that demonstrate your empathy. Appeal to personal ethics and a higher calling. Show that you care about them and others on the team.

Authentic Idealists are considered **peaceful leaders**. They can easily handle the details of day to day operations and are process oriented, although the small stuff can get them sidetracked. As a leader, they have the greatest amount of compassion, so it is easy for others to share their feelings, interests, and challenges with them. Authentic Idealists can be difficult to motivate externally, which might frustrate others, but they are well motivated intrinsically.

One of the major considerations for them is that the group gets along, so they foster a sense of togetherness and try to smooth conflict. Sometimes their efforts at peacefulness can be at the expense of getting results for the team, but harmony is really essential for them.

#### **Authentic Idealists are often seen as:**

- Encouraging
- Enthusiastic
- Supportive
- Humorous
- Relaxed

#### **They can sometimes be:**

- Impractical
- Vague
- Manipulative
- Not sufficiently serious or focused on the bottom line

### **Mostly C's – Organized Guardians**

Organized Guardians are extremely **dependable and loyal**, and they play by the rules. They have an amazing work ethic, stay down-to-earth, and they like routine. They are thorough and orderly. At times they are too serious, but they are practically always serious. They are good at taking care of other people. They want to hear about the bottom line, and they want the facts.

Organized Guardians will consider charts and graphs and follow a well prepared presentation longer than most people. However, they can also shut down when too much emotion is presented and may get bored with stories. This temperament makes up **40 to 45% of the population** and includes people like Queen Elizabeth II, Mother Teresa, George Washington, and Colin Powell. With their respect for tradition, they are drawn to the military and policing. These are also the people who will pass traditions to their children and grandchildren.

**To connect with Organized Guardians** on your team, be concise, organized, and provide supportive data. Present information in logical sequence, and avoid any tendencies for tangents.

**If you are an Organized Guardian as a leader**, you will be very logical and grounded. You might be inclined to present data with everything that you discuss with members of your team, so learn their preferences and see how much information is really necessary.

Your compassion for others adds depth to your work, although you will only demonstrate your emotional depth with people that you trust. You'll capture the attention of people on your team because you are interesting and a positive influence. Your passion shows when you are working on the right things and in the right place. You maintain high levels of organization and control, but you can also be flexible and think on your feet.

#### **People often describe Organized Guardians as:**

- Cooperative
- Independent
- Traditional
- Flexible
- Imaginative

#### **Sometimes, they can also be:**

- Too future oriented
- Not task focused
- Unrealistic
- A dreamer

#### **Mostly D's – Resourceful Artisans**

Resourceful Artisans **crave action and live in the moment**. They are very social, confident, and persuasive. Donald Trump, Steven Spielberg, and Madonna are notable Resourceful Artisans. They're witty, playful, and fun. If they had a message to share, it would be that the world could lighten up a little. They love playing to an audience, and look at the world as their stage. Like Organized Guardians, they can also perceive the world concretely. They can get bored with visionary tasks. They enjoy stories that

they can easily relate to and imagine happening to them. This temperament makes up about **35% of the population**.

**To connect with Resourceful Artisans on your team**, be authentic and spontaneous. Engage them with questions and discussion. Use well-developed, engaging personal stories. Let your creativity show so that they can connect with you. This style wants you to deliver an experience, not just assignments.

**If you're Resourceful Artisan as a leader, your strengths include** energy, personality, and creativity. You'll deliver results. You'll get a thrill from the emotional connection between you and the people that you work with. You are a popular leader, and will create a fun environment if it doesn't exist already.

**Your weakness** might be in your organization and structure. Because you are living in the moment, you will avoid the homework that goes into the development of brilliant work. Sometimes you challenge authority or act as devil's advocate, and you may find it a struggle to work with conservative or risk-averse organizations.

**People often describe Resourceful Artisans as:**

- Candid
- Honest
- Principled
- Assertive
- Ethical

**Sometimes, Resourceful Artisans can also be:**

- Rigid
- Arrogant
- Self-righteous
- Unyielding

**What's Important?**

We all have preferences for how we do things, and now we hopefully understand a bit more about them. It's also important to remember that we ALL have the range of temperaments described here. We just have our own preferences; you might be mostly A, but call on behaviors that are more closely associated with B or C or D as needed. It's also important to have a range of types in our workplace. The strength of having some people looking after facts and figures, while others appeal to emotions and spontaneity, makes our business effective. It's the blend, that presence of different temperaments with in a multitude of strengths, which keeps our world fascinating.

**Test your knowledge**

**Debrief**

**Do you agree with the explanations for your temperament?**

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**What factors stand out?**

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**What do you not agree with?**

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**How can you alter your approach to meet your greatest challenge?**

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**Further Reading:**

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