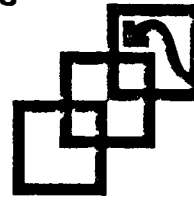


Paul Hersey and Ken Blanchard's

Situational Leadership



Over the last few decades, people in the field of management have been involved in a search for a "best" style of leadership. Yet, the evidence from research clearly indicates that there is no single all-purpose leadership style. Successful leaders are those who can adapt their behavior to meet the demands of their own unique situation.

A SITUATIONAL LEADERSHIP THEORY

A situational leadership theory helpful to managers in diagnosing the demands of their situation has been developed as a result of extensive research. This theory is based on the amount of direction (task behavior) and the amount of socio-emotional support (relationship behavior) a leader must provide given the situation and "the level of maturity" of the follower or group.

Task Behavior and Relationship Behavior

The recognition of task and relationship as two critical dimensions of a leader's behavior has been an important part of management research over the last several decades. These two dimensions have been labeled various things ranging from "autocratic" and "democratic," to "employee-oriented" and "production-oriented."

For some time, it was believed that task and relationship were either/or styles of leadership and, therefore, could be shown as a continuum, moving from very authoritarian leader behavior (task) at one end to very democratic leader behavior (relationship) at the other.

In more recent years, the idea that task and relationship were either/or leadership styles has been dispelled. In particular, extensive leadership studies at Ohio State University questioned this assumption and proved it wrong.

By spending time actually observing the behavior of leaders in a wide variety of situations, the Ohio State staff found that they could classify most of the activities of leaders into two distinct and different behavioral categories or dimensions. They named these two dimensions "Initiating Structure" (task behavior) and "Consideration" (relationship behavior). Definitions of these two dimensions follow:

Task behavior is the extent to which a leader engages in one-way communication by explaining what each follower is to do as well as when, where, and how tasks are to be accomplished. *Relationship behavior* is the extent to which a leader engages in two-way communication by providing socio-emotional support, "psychological strokes," and facilitating behaviors.

In the leadership studies mentioned, the Ohio State staff found that leadership styles tended to vary considerably. The behavior of some leaders was characterized mainly by directing activities for their followers in terms of task accomplishment, while other leaders concen-

trated on providing socio-emotional support in terms of personal relationships between themselves and their followers. Still other leaders had styles characterized by both task and relationship behavior. There were even some leaders whose behavior tended to provide little task or relationship for their followers. No dominant style appeared. Instead, various combinations were evident. Thus, it was determined that task and relationship are not either/or leadership styles. Instead, these patterns of leader behavior can be plotted on two separate and distinct axes as shown in Figure 1.

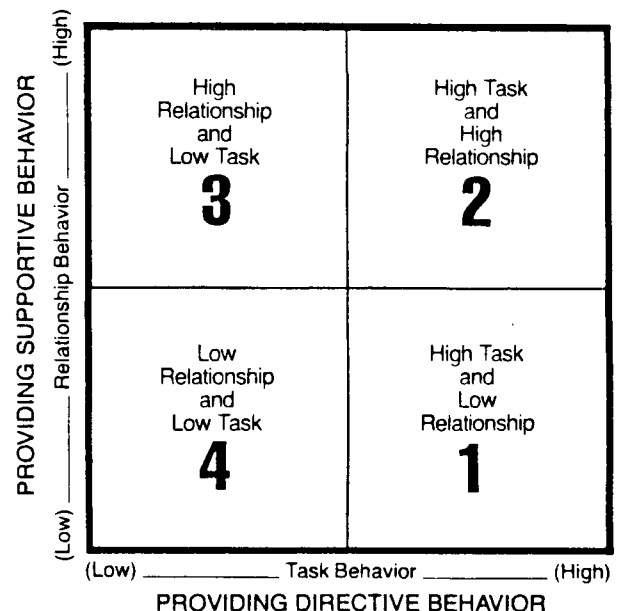


FIGURE 1 Four basic leader behavior styles.

Since research in the past several decades has clearly supported the contention that there is no "best" style of leadership, any of the four basic styles shown in Figure 1 may be effective or ineffective depending on the situation.

Situational Leadership Theory is based upon an interplay among (1) the amount of direction (task behavior) a leader gives, (2) the amount of socio-emotional support (relationship behavior) a leader provides, and (3) the "maturity" level that followers exhibit on a specific task, function, or objective that the leader is attempting to accomplish through the individual or group (follower(s)).

LEVEL OF MATURITY

Maturity is defined in Situational Leadership Theory as the capacity to set high but attainable goals (achievement-motivation), willingness and ability to take responsibility, and education and/or experience of

an individual or a group. *These variables of maturity should be considered only in relation to a specific task to be performed.* That is to say, an individual or a group is not mature or immature in any *total* sense. People tend to have varying degrees of maturity depending on the specific task, function, or objective that a leader is attempting to accomplish through their efforts.

Thus, a sales representative may be very mature in the way he or she approaches sales calls but may not demonstrate the same degree of maturity in developing and writing customer proposals. As a result, it may be quite appropriate for this individual's manager to provide little direction and help on sales call activities; yet provide a great deal of direction and close supervision over the individual's proposal writing activity.

The Basic Concept

According to Situational Leadership Theory, as the level of maturity of the follower continues to increase in terms of accomplishing a specific task, the leader should begin to *reduce* task behavior and *increase* relationship behavior. This should be the case until the individual or group reaches a moderate level of maturity. As the follower begins to move into an above average level of maturity, it becomes appropriate for the leader to decrease not only task behavior but relationship behavior as well. Now the follower is not only mature in terms of the performance of the task but also is psychologically mature.

Since the follower can provide his or her own "strokes" and reinforcement, a great deal of socio-emotional support from the leader is no longer necessary. People at this maturity level see a reduction of close supervision and an increase in delegation by the leader as a positive indication of trust and confidence. Thus, Situational Leadership Theory focuses on the appropriateness or effectiveness of leadership styles according to the *task relevant maturity* of the follower(s). This cycle can be illustrated by a bell-shaped curve superimposed upon the four leadership quadrants, as shown in Figure 2.

Style of leader vs. Maturity of followers

Figure 2 attempts to portray the relation between task relevant maturity and the appropriate leadership styles to be used as the follower moves from immaturity to maturity. As indicated, the reader should keep in mind that the figure represents two different phenomena. The appropriate leadership style (*style of leader*) for given levels of follower maturity is portrayed by a curvilinear function in the four leadership quadrants. The maturity level of the individual or group being supervised (*maturity of followers*) is depicted below the leadership model as a *continuum* ranging from immature to mature.

In referring to the leadership styles in the model, we will use the following shorthand designations: (1) high task-low relationship will be referred to as leader behavior style S1; (2) high task-high relationship behavior as leader behavior style S2; (3) high relationship-low task behavior as leader behavior style S3; and (4) low relationship-low task behavior as style S4.

In terms of follower maturity, it is not simply a question of being mature or immature but a question of degree. As can be seen in Figure 2, some benchmarks of

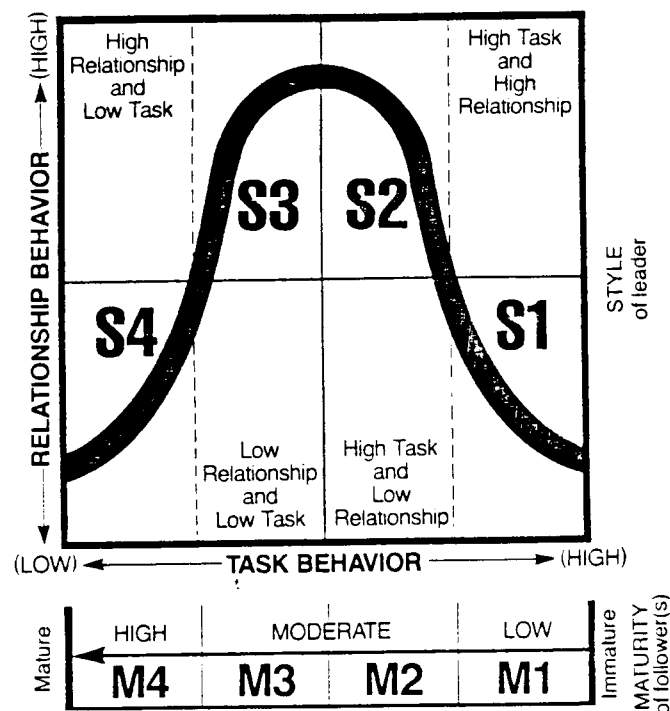


FIGURE 2 Situational Leadership Theory.

maturity can be provided for determining appropriate leadership style by dividing the maturity continuum into four levels of maturity. Low levels of task relevant maturity are referred to as maturity level M1; low to moderate as maturity level M2; moderate to high as maturity level M3; and high levels of task relevant maturity as maturity level M4.

APPLICATION

What does the bell-shaped curve in the style-of-leader portion of the model mean? It means that as the maturity level of one's followers develops along the maturity continuum from immature to mature, the appropriate style of leadership moves accordingly along the curvilinear function.

Determining Appropriate Style

To determine what leadership style is appropriate to use in a given situation, one must first determine the maturity level of the follower in relation to a specific task that the leader is attempting to accomplish through the follower's efforts. Once this maturity level is identified, the appropriate leadership style can be determined by constructing a right angle (90° angle) from the point on the continuum that identifies the maturity level of the follower to a point where it intersects on the curvilinear function in the style of leader portion of the model. The quadrant in which that intersection takes place suggests the appropriate style to be used by the leader in that situation with a follower of that maturity level. Let us look at an example in Figure 3.

Suppose a manager has determined that a subordinate's maturity level in terms of administrative paper work is low. Using Situational Leadership Theory she would place an X on the maturity continuum as shown in Figure

3 (above M1). Once the manager had decided that she wanted to influence the subordinate's behavior in this area, the manager could determine the appropriate initial style to use by constructing a right angle from the X drawn on the maturity continuum to a point where it intersects the bell-shaped curve (designated in Figure 3 by O). Since the intersection occurs in the S1 quadrant, it is suggested that when working with this subordinate who demonstrates M1 maturity on this particular task, the manager should use an S1 style (high task-low relationship behavior). If one follows this technique for determining the appropriate leadership style for all four of the maturity levels, it will become clear that the four maturity designations (M1, M2, M3, M4) correspond to the four leadership behavior designations (S1, S2, S3, S4); that is, M1 maturity needs S1 style, M2 maturity needs S2 style, etc.

In this example, when we say low relationship behavior, we do not mean that the manager is not friendly or personable to the subordinate. We merely suggest that the manager, in supervising the subordinate's handling of administrative paper work, should spend more time directing the person in what to do and how, when, and where to do it, than providing socio-emotional support and reinforcement. Increased relationship behavior should occur when the subordinate begins to demonstrate the ability to handle necessary administrative paper work. At that point, a movement from Style 1 to Style 2 would be appropriate.

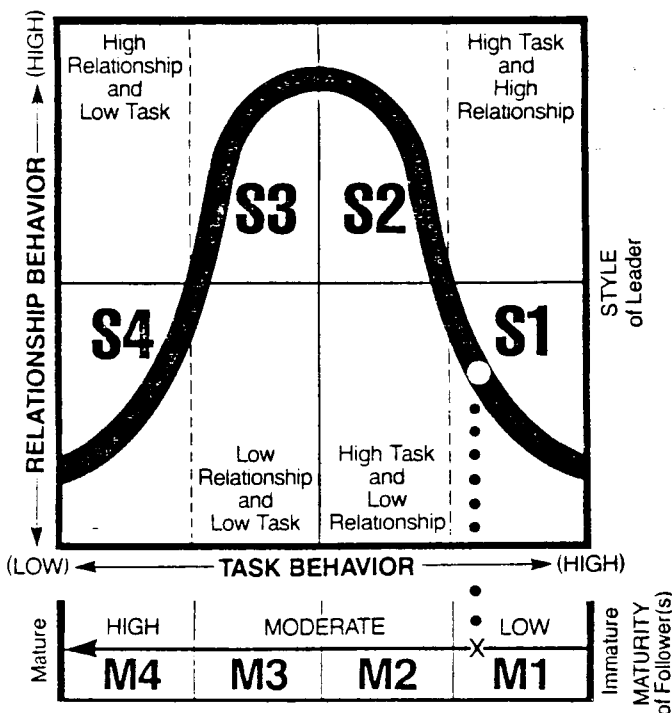


FIGURE 3 Determining an Appropriate Leadership Style.

Thus, Situational Leadership Theory contends that in working with people who are low in maturity (M1) in terms of accomplishing a specific task, a high task/low relationship style (S1) has the highest probability of success; in dealing with people who are of low to moderate maturity (M2), a moderate structure and socio-emotional style (S2) appears to be most appropriate;

while in working with people who are of moderate to high maturity (M3) in terms of accomplishing a specific task, a high relationship/low task style (S3) has the highest probability of success; and finally, a low relationship/low task style (S4) has the highest probability of success in working with people of high task relevant maturity (M4).

While it is important to keep in mind the definitions of task and relationship behavior given earlier, the labeling of the four styles of Situational Leadership Theory, as in Figure 4, on the following page, is sometimes useful for quick diagnostic judgments.

High task/low relationship leader behavior (S1) is referred to as "telling" because this style is characterized by one-way communication in which the leader defines the roles of followers and tells them what, how, when, and where to do various tasks.

High task/high relationship behavior (S2) is referred to as "selling" because with this style most of the direction is still provided by the leader. He or she also attempts through two-way communication and socio-emotional support to get the follower(s) psychologically to buy into decisions that have to be made.

High relationship/low task behavior (S3) is called "participating" because with this style the leader and follower(s) now share in decision making through two-way communication and much facilitating behavior from the leader since the follower(s) have the ability and knowledge to do the task.

Low relationship/low task behavior (S4) is labeled "delegating" because the style involves letting follower(s) "run their own show." The leader delegates since the follower(s) are high in maturity, being both willing and able to take responsibility for directing their own behavior.

MODIFYING LEVELS OF MATURITY

In attempting to improve the maturity of followers who have not taken much responsibility in the past, a leader must be careful not to increase socio-emotional support (relationship behavior) too rapidly. If this is done, the followers may view the leader as becoming a "soft touch." Thus the leader must develop followers slowly using a *little* less task behavior and a *little* more relationship behavior as followers mature. When an individual's performance is low, one cannot expect drastic changes overnight. For more desirable behavior to be obtained, a leader must reward as quickly as possible the slightest appropriate behavior exhibited by the individual in the desired direction and continue this process as the individual's behavior comes closer and closer to the leader's expectations of good performance. This is a behavior modification concept. For example, if a leader wants to improve the maturity level of a follower so this follower will assume significantly more responsibility, the leader's best bet initially is to *reduce* a little of the direction (task behavior) by giving the follower an opportunity to assume some increased responsibility. If this responsibility is well handled, the leader should reinforce this behavior with increases in relationship behavior. This is a two step process: first, reduction in direction, and *if adequate performance follows*; second, increase in

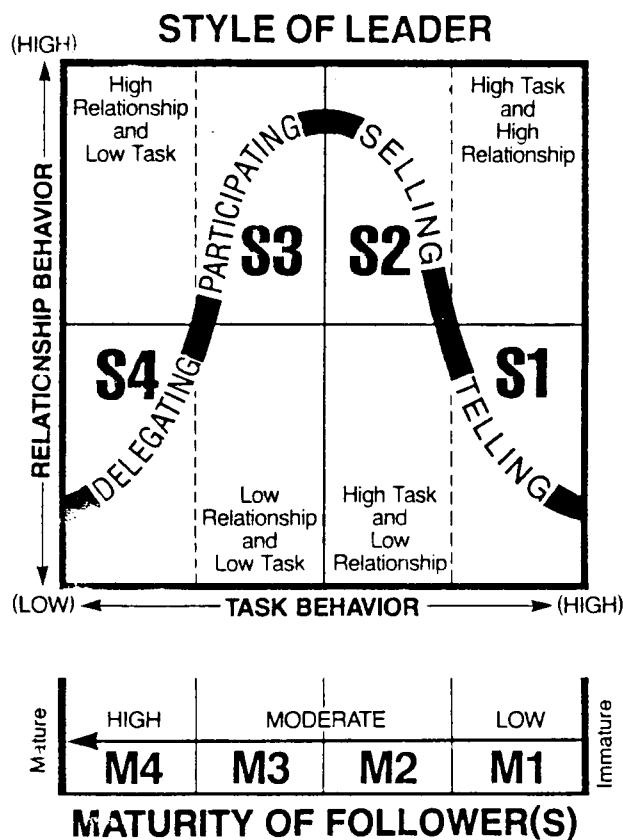


FIGURE 4 Situational Leadership

socio-emotional support as reinforcement. This process should continue until the follower is assuming significant responsibility and performing as an individual of moderate maturity. This does not mean that the individual's work will have less direction, but the direction will now be internally imposed by the follower rather than externally imposed by the leader. When this process occurs, followers are not only able to provide their own direction for many of the activities in which they engage, but also begin to be able to provide their own satisfaction for interpersonal and emotional needs. At this stage followers are positively reinforced for accomplishments by the leader *not* looking over their shoulder and by the leader leaving them more and more on their own. It is not that there is less mutual trust and friendship (in fact, there is more) but it takes less direct effort on the leader's part to prove it with mature followers.

Although this theory seems to suggest a basic style for different levels of maturity it is not quite that simple. When followers begin to behave less maturely, for whatever reason, i.e. crisis at home, change in work technology, etc., it becomes appropriate and necessary for leaders to adjust their behavior backward through the bell shaped curve to meet the present maturity level of the followers. For example, take a subordinate who is presently working well without much supervision. Suppose, suddenly, a family crisis begins to affect this person's performance on the job. In this situation, it might very well be appropriate for the manager to increase *moderately* both direction and support until the subordinate regains composure.

Take another example of a teacher who was highly motivated and competent (M4) and therefore could be left on his own. Suppose he is promoted to principal. While it may have been appropriate to leave him alone (S4) as a teacher, now that he is a principal, a task for which he has little experience, it may be appropriate for his supervisor to change styles by first providing more socio-emotional support and then increasing the direction and supervision of his activities (Style 4 to Style 3 to Style 2). This high task-high relationship style should continue until the person is able to grasp the new responsibilities. At that time, a movement back from Style 2 through Style 3 to Style 4 would be appropriate. Starting off using the same leadership style that was successful while he was a teacher may now prove ineffective because it is inappropriate for the needs of this situation.

In summary, effective leaders must know their staffs well enough to meet their everchanging abilities and demands upon them. It should be remembered that over time followers as individuals and as groups develop their own patterns of behavior and ways of operating, i.e. norms, customs and mores. While a leader may use a specific style for the work group *as a group*, that leader may quite often have to behave differently with individual followers because they are at different levels of maturity. In either case, whether working with a group or an individual, changes in leadership style from S1 to S2, S3, and S4, *must be gradual!* This process by its very nature cannot be revolutionary but must be evolutionary: gradual developmental changes, a result of planned growth and the creation of mutual trust and respect.

REFERENCES

For a more detailed discussion of this leadership theory and other related behavioral science frameworks see Paul Hersey and Kenneth H. Blanchard, *Management of Organizational Behavior: Utilizing Human Resources*, 3rd Edition (Englewood Cliffs, N.J.: Prentice-Hall Inc., 1977).

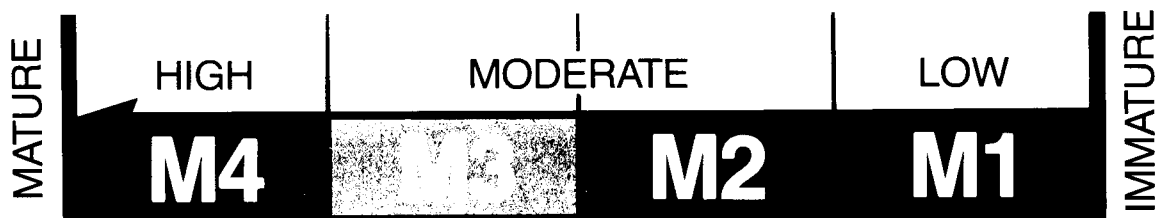
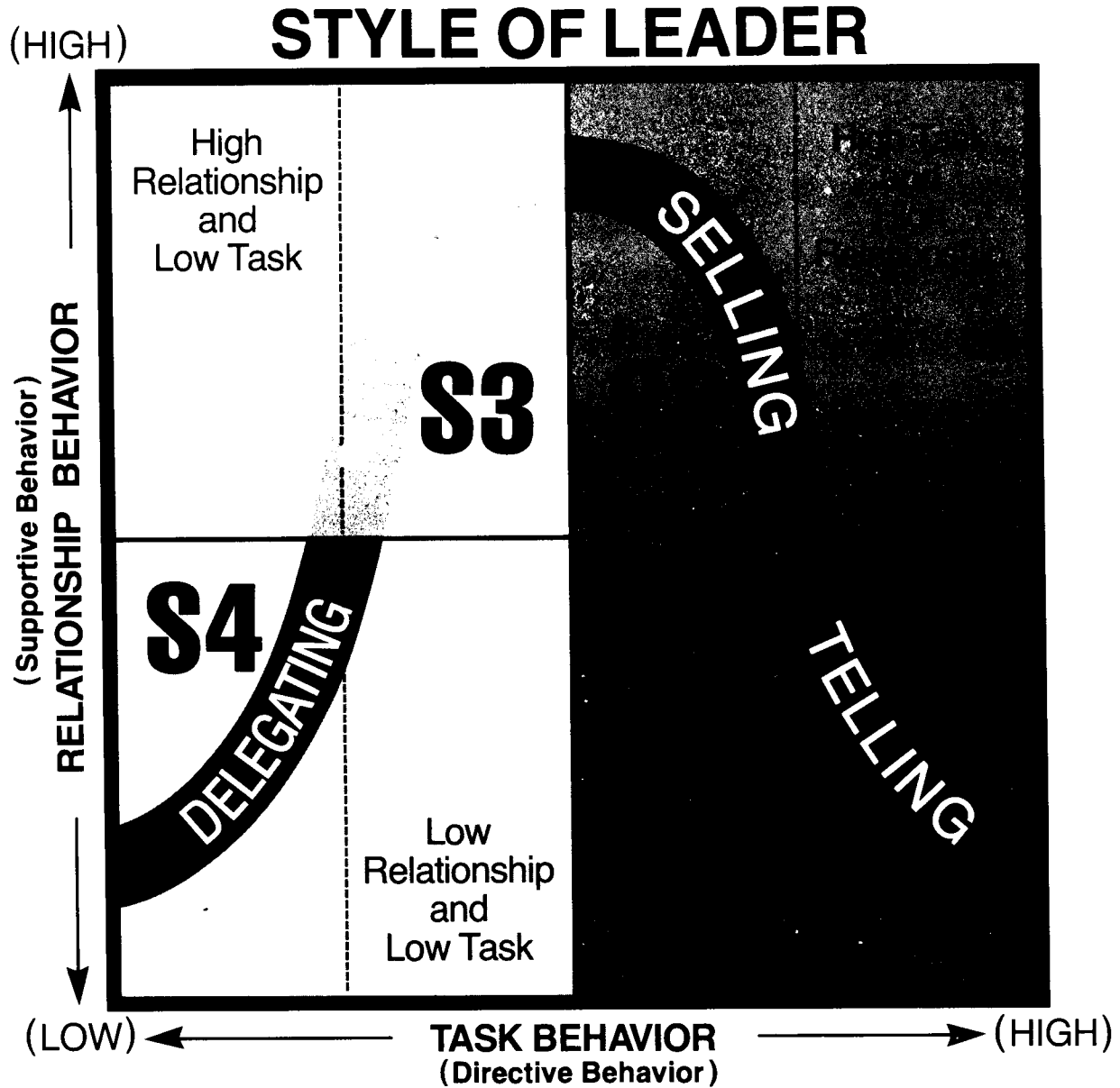
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SITUATIONAL LEADERSHIP



MATURITY OF FOLLOWER(S)

Developed by Paul Hersey and Kenneth H. Blanchard

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Leader Effectiveness & Adaptability Description

<p>1</p> <p>SITUATION</p> <p>Your subordinates are not responding likely to your friendly conversation and obvious concern for their welfare. Their performance is declining rapidly.</p> <p>ALTERNATIVE ACTIONS</p> <ol style="list-style-type: none"> Emphasize the use of uniform procedures and the necessity for task accomplishment. Make yourself available for discussion but don't push your involvement. Talk with subordinates and then set goals. Intentionally do not intervene. <p>ALTERNATIVE ACTIONS</p> <ol style="list-style-type: none"> Engage in friendly interaction, but continue to make sure that all members are aware of their responsibilities and expected standards of performance. Take no definite action. Do what you can to make the group feel important and involved. Emphasize the importance of deadlines and tasks. 	<p>7</p> <p>SITUATION</p> <p>You are considering changing to a structure that will be new to your group. Members of the group have made suggestions about needed change. The group has been productive and demonstrated flexibility in its operations.</p> <p>ALTERNATIVE ACTIONS</p> <ol style="list-style-type: none"> Define the change and supervise carefully. Participate with the group in developing the change but allow members to organize the implementation. Be willing to make changes as recommended, but maintain control of implementation. Avoid confrontation; leave things alone. <p>ALTERNATIVE ACTIONS</p> <ol style="list-style-type: none"> I leave the group alone. Discuss the situation with the group and then you initiate necessary changes. Take steps to direct subordinates toward working in a well-defined manner. The supervisor in discussing the situation with the group but not too directive.
<p>2</p> <p>SITUATION</p> <p>The observable performance of your group is increasing. You have been making sure that all members were aware of their responsibilities and expected standards of performance.</p> <p>ALTERNATIVE ACTIONS</p> <ol style="list-style-type: none"> Work with the group and together engage in problem-solving. Let the group work it out. Act quickly and firmly to correct and redirect. Encourage group to work on problem and be supportive of their efforts. <p>ALTERNATIVE ACTIONS</p> <ol style="list-style-type: none"> Allow group involvement in developing the change, but don't be too directive. Announce changes and then implement with close supervision. Allow group to formulate its own direction. Incorporate group recommendations, but you direct the change. 	<p>8</p> <p>SITUATION</p> <p>Group performance and interpersonal relations are good. You feel somewhat unsure about your lack of direction of the group.</p> <p>ALTERNATIVE ACTIONS</p> <ol style="list-style-type: none"> Let the group work out its problems. Incorporate group recommendations, but see that objectives are met. Redefine goals and supervise carefully. Allow group involvement in setting goals, but don't push. <p>ALTERNATIVE ACTIONS</p> <ol style="list-style-type: none"> Take steps to direct subordinates toward working in a well-defined manner. Discuss past performance with group and then you examine the need for new practices. Continue to leave group alone.
<p>3</p> <p>SITUATION</p> <p>Members of your group are unable to solve a problem themselves. You have normally left them alone. Group performance and interpersonal relations have been good.</p> <p>ALTERNATIVE ACTIONS</p> <ol style="list-style-type: none"> Allow group to formulate its own direction. Announce changes and then implement with close supervision. Allow group to formulate its own direction. Incorporate group recommendations, but you direct the change. <p>ALTERNATIVE ACTIONS</p> <ol style="list-style-type: none"> Take steps to direct subordinates toward working in a well-defined manner. Involve subordinates in decision-making and force good contributions. Discuss past performance with group and then you examine the need for new practices. Continue to leave group alone. 	<p>9</p> <p>SITUATION</p> <p>Your superior has appointed you to head a task force that is far overburdened in making requested recommendations for change. The group is not clear on its goals. Attendance at sessions has been poor. Their meetings have turned into social gatherings. Ideally they have the talent necessary to help.</p> <p>ALTERNATIVE ACTIONS</p> <ol style="list-style-type: none"> Allow group involvement in redefining standards, but don't take control. Redefine standards and supervise carefully. Avoid confrontation by not applying pressure; leave situation alone. Incorporate group recommendations, but see that new standards are met. <p>ALTERNATIVE ACTIONS</p> <ol style="list-style-type: none"> Try out your solution with subordinates and examine the need for new practices. Allow group members to work on themselves. Act quickly and firmly to correct and redirect. Participate on problem discussion while providing support for subordinates.
<p>4</p> <p>SITUATION</p> <p>You are considering a change. Your subordinates have a fine record of accomplishment. They respect the need for change.</p> <p>ALTERNATIVE ACTIONS</p> <ol style="list-style-type: none"> Allow group to formulate its own direction. Incorporate group recommendations, but see that objectives are met. Redefine roles and responsibilities and supervise carefully. Allow group involvement in determining roles and responsibilities but don't be too directive. <p>ALTERNATIVE ACTIONS</p> <ol style="list-style-type: none"> Do what you can to make group feel important and involved. Emphasize the importance of deadlines and tasks. Get group involved in decision-making, but see that objectives are met. 	<p>10</p> <p>SITUATION</p> <p>Your subordinates, usually able to take responsibility, are not responding to your recent redefining of standards.</p> <p>ALTERNATIVE ACTIONS</p> <ol style="list-style-type: none"> Take steps to direct subordinates toward working in a well-defined manner. Involve subordinates in decision-making and force good contributions. Discuss past performance with group and then you examine the need for new practices. Continue to leave group alone.
<p>5</p> <p>SITUATION</p> <p>The performance of your group has been dropping during the last few months. Members have been unconcerned with meeting objectives. Redefining roles and responsibilities has helped in the past. They have communally needed reminding to have their tasks done on time.</p> <p>ALTERNATIVE ACTIONS</p> <ol style="list-style-type: none"> Do what you can to make group feel important and involved. Emphasize the importance of deadlines and tasks. Get group involved in decision-making, but see that objectives are met. 	<p>11</p> <p>SITUATION</p> <p>You have been promoted to a new position. The previous supervisor was uninvolved in the affairs of the group. The group has adequately handled its tasks and direction. Group inter-relationships are good.</p> <p>ALTERNATIVE ACTIONS</p> <ol style="list-style-type: none"> Try out your solution with subordinates and examine the need for new practices. Allow group members to work on themselves. Act quickly and firmly to correct and redirect. Participate on problem discussion while providing support for subordinates.
<p>6</p> <p>SITUATION</p> <p>You stepped into an efficiently run organization. The previous administrator tightly controlled the situation. You want to maintain a productive situation, but would like to begin humanizing the environment.</p> <p>ALTERNATIVE ACTIONS</p> <ol style="list-style-type: none"> Do what you can to make group feel important and involved. Emphasize the importance of deadlines and tasks. Get group involved in decision-making, but see that objectives are met. 	<p>12</p> <p>SITUATION</p> <p>Recent information indicates some internal difficulties among subordinates. The group has a remarkable record of accomplishment. Members have effectively maintained long-range goals. They have worked in harmony for the past year. All are well qualified for the task.</p> <p>ALTERNATIVE ACTIONS</p> <ol style="list-style-type: none"> Do what you can to make group feel important and involved. Emphasize the importance of deadlines and tasks. Get group involved in decision-making, but see that objectives are met.

Leader Effectiveness & Adaptability Description

DIRECTIONS FOR SCORING

Circle the letter that you have chosen for each situation on the same line to the right, under Column I (STYLE RANGE) and also Column II (STYLE ADAPTABILITY). After you have circled alternative actions, total the number of circles for each sub-column under Column I (STYLE RANGE) and Column II (STYLE ADAPTABILITY) and enter totals in the spaces provided below.

SITUATIONS	COLUMN I (Style Range) Alternative Actions				COLUMN II (Style Adaptability) Alternative Actions			
	(1)	(2)	(3)	(4)	(a)	(b)	(c)	(d)
1	A	C	B	D	D	B	C	A
2	D	A	C	B	B	D	C	A
3	C	A	D	B	C	B	A	D
4	B	D	A	C	B	D	A	C
5	C	B	D	A	A	D	B	C
6	B	D	A	C	C	A	B	D
7	A	C	B	D	A	C	D	B
8	C	B	D	A	C	B	D	A
9	C	B	D	A	A	D	B	C
10	B	D	A	C	B	C	A	D
11	A	C	B	D	A	C	D	B
12	C	A	D	B	C	A	D	B
Sub-columns	(1)	(2)	(3)	(4)	(a)	(b)	(c)	(d)

(a)	(b)	(c)	(d)	=
-2	-1	+1	+2	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	TOTAL

Processing Data from Column I (Style Range)

Sub-column totals from Column I (Style Range) can be located on the basic styles, (the middle portion) of the Tri-Dimensional Leader Effectiveness Model below. The column numbers correspond to the quadrant numbers of the leadership model as follows:

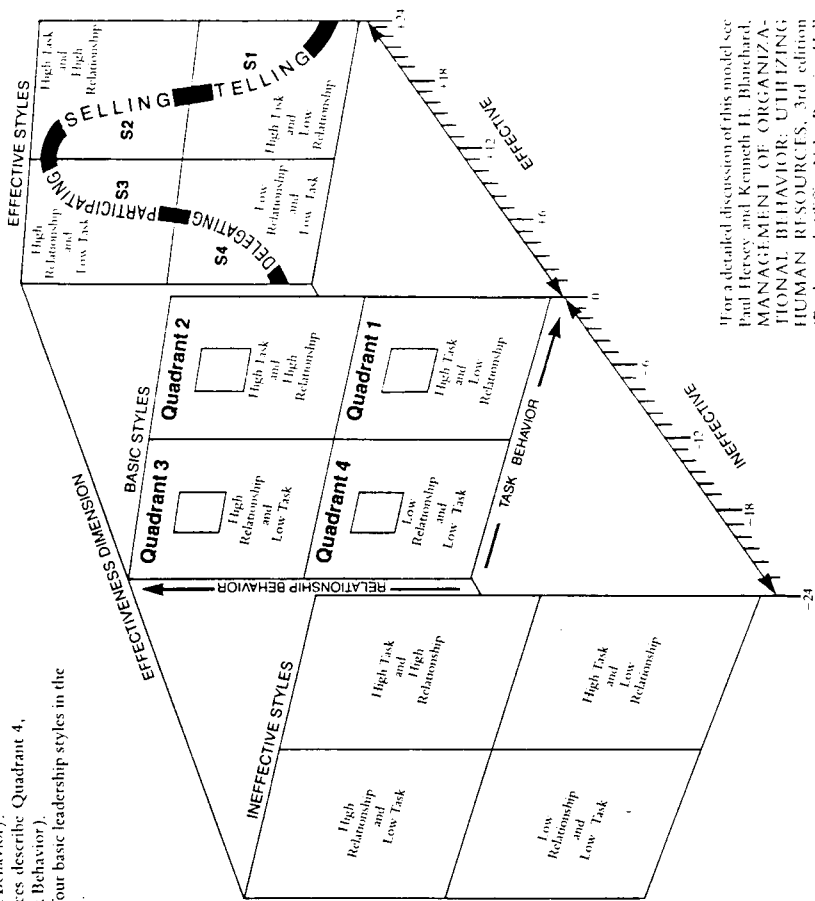
- Sub-column (1)—alternative action choices describe Quadrant 1, (High Task/Low Relationship Behavior).
- Sub-column (2)—alternative action choices describe Quadrant 2, (High Task/High Relationship Behavior).
- Sub-column (3)—alternative action choices describe Quadrant 3, (High Relationship/Low Task Behavior).
- Sub-column (4)—alternative action choices describe Quadrant 4, (Low Relationship/Low Task Behavior).

Enter the totals associated with each of the four basic leadership styles in the boxes provided on the leadership model below.

Processing Data from Column II (Style Adaptability)

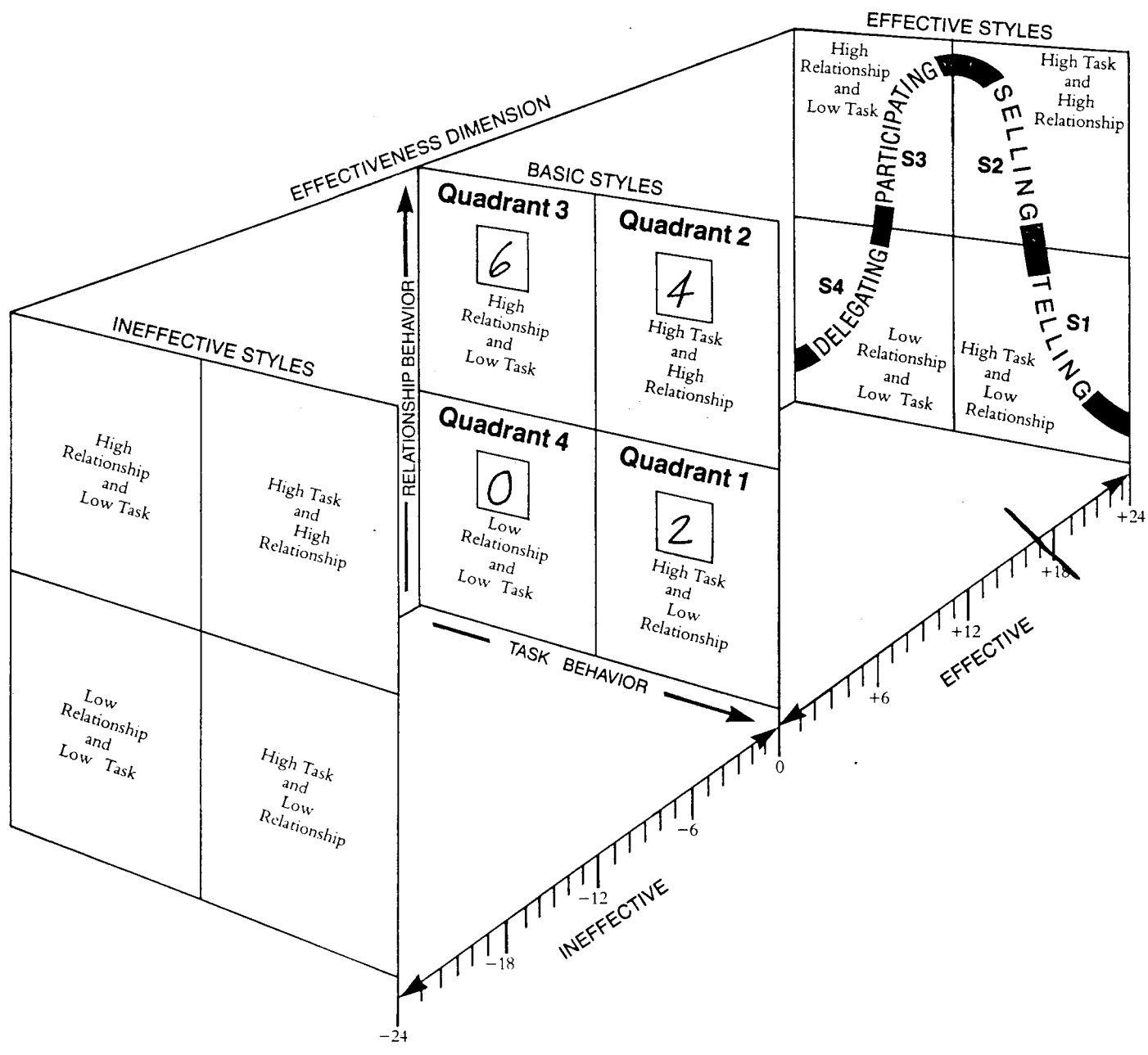
Multiply the totals entered in sub-columns (a), (b), (c), and (d) under column II by the positive and negative factors in the same sub-columns. Enter the product in the space provided directly below. (Be sure to include pluses and minuses.) Then add all four figures and record the sum in the box designated TOTAL.

Then place an arrow (→) at the corresponding number along the ineffective or effective dimension of the leadership model below.



THE TRI-DIMENSIONAL LEADER EFFECTIVENESS MODEL

For a detailed discussion of this model see Paul Hersey and Kenneth H. Blanchard, *MANAGEMENT OF ORGANIZATIONAL BEHAVIOR: UTILIZING HUMAN RESOURCES*, 3rd edition (Englewood Cliffs, N.J.: Prentice-Hall Inc., 1977).



		COLUMN I (Style Range) Alternative Actions			
		(1)	(2)	(3)	(4)
SITUATIONS	1	A	C	B	D
	2	D	A	C	B
	3	C	A	D	B
	4	B	D	A	C
	5	C	B	D	A
	6	B	D	A	C
	7	A	C	B	D
	8	C	B	D	A
	9	C	B	D	A
	10	B	D	A	C
	11	A	C	B	D
	12	C	A	D	B
Sub-columns		(1)	(2)	(3)	(4)
		2	4	6	0

COLUMN II (Style Adaptability) Alternative Actions				
	(a)	(b)	(c)	(d)
D	B	C	A	
B	D	C	A	
C	B	A	D	
B	D	A	C	
A	D	B	C	
C	A	B	D	
A	C	D	B	
C	B	D	A	
A	D	B	C	
B	C	A	D	
A	C	D	B	
C	A	D	B	
(a)	(b)	(c)	(d)	
0	1	4	7	

Multiply by:

(a)	(b)	(c)	(d)
-2	-1	+1	+2

$$0 + (-1) + 4 + 14 =$$

TOTAL
17

SITUATIONAL LEADERSHIP STYLES SEMINAR

"TWELVE O'CLOCK HIGH"

CHARACTERS AND CAST

General Pritchard (Millard Mitchell) - Corps Commander

General Savage (Gregory Peck) - Second 918th Bomb Group Commander

Colonel Davenport (Gary Merrill) - First 918th Bomb Group Commander

Lt. Col. Ben Gately (Hugh Marlowe) - First Exec. Officer

Major Stovall (Dean Jagger) - Group Adjutant

Captain "Doc" Kaiser (Paul Stewart) - Group Physician

Major Cobb (John Kellogg) - Second Exec. Officer

Lt. Bishop (Bob Patten) - Medal of Honor Winner

Sergeant McIlhenny (Robert Arthur) - Group Clerk/Savage's Driver

Lt. Zimmerman (Lee McGregor) - Navigator

ABRIDGED EXCERPT FROM PASSION FOR EXCELLENCE
BY TOM PETERS & NANCY AUSTIN

THE "SMELL" OF
THE CUSTOMER

"SMELL": NOT "MARKET ORIENTATION," but living for one's customers. How do you know you're moving in that direction? Or when you've arrived? Here's a list of seventeen aspects of a true "customers first" orientation. Almost all are missing from most management and even marketing texts. The list is not meant to be exhaustive. None is exotic. Each is merely sensible.

1. Company bulletins, and all other forms of printed matter feature stories about working with customers. Special bulletins dealing exclusively with customer service are issued regularly.
2. In a host of ways, unique respect for salespeople is demonstrated. Celebrations for salespeople are special and taken very seriously.
3. Customer support people are showered with attention. "Excessive" training is aimed at till persons, people who answer the phone the "minor actors" in the service delivery effort (e.g., dispatchers, delivery drivers). Major celebrations for these people are common, with awards focusing directly on tiny acts of meritorious service to customers.
4. The importance of the customer pervades every function of the organization. The customer is "alive", through displays of letters (good and bad).
5. There is a special (and friendly/respectful) language associated with customers, a la "guest" at Disney. In particular, contemptuous language is simply not permitted.
6. Performance reviews and reports of all kinds have the majority of their content aimed at customers and revenue enhancement activities. Almost every report begins with an analysis of the direct impact of any proposed action on the customer.
7. Visits with customers are exchanged regularly, at all levels in the company and customer organization. Customers are invited in to visit the store, especially back-room operations.
8. Customer support stories are invariable personalized. The customer is treated as a unique person, not as a statistical abstraction.
9. Devices abound for customer listening surveys (of customers and our people's views of our customer support skills) are conducted regularly--i.e., at least monthly. Numerous formal and informal customer feedback devices exist, are used, and are paid attention to. "Iron laws" about time-to-respond (e.g., eight to forty-eight hours) to customer requests and information from customers' feedback surveys are religiously enforced.

Customer satisfaction is measured frequently--monthly at least, and perhaps as often as weekly. Sampling is extensive. Surveys are quantitative as well as qualitative (i.e., response time and feelings count equally); the measures are taken very, very seriously. They are reviewed by top management. Evaluation of people in all functions at all levels is significantly affect by the satisfaction measures. Special, intense "customer satisfaction reviews" are regularly given in addition to the regular evaluation procedures.

10. "Overkill" complaint response mechanisms are firmly locked in place. Unfailingly, they include an "excessive" (as viewed by the rest of the industry's standards) focus on immediacy and personalization of the response. Foul-ups with big or small customers are not tolerated; even minor glitches are brought swiftly to the attention of top management. Top management, in turn, gets directly involved both with the customer and with correcting what went on.
11. Promises to customers are kept, period, regardless of cost in overtime.
12. Quality and reliability of product and service is an obsession throughout the organization, reflecting virtually the same intensity as that directed to the customer per se. Stories of tiny quality improvements and celebrations of those who brought them about are abundant. The product or the service-in-use is prominent and "excessively" displayed. Almost all in the company use the product themselves, if possible. A new or enhanced product when it's launched, is in evidence--in every corner of the organization.
13. Every element of the organization actively looks for ways that it can specifically contribute to differentiating the product or service. Even ideas that add only minuscule improvement in performance (especially as it's perceived by the customer) are the subject of endless reviews, bragging sessions, awards and ceremonies.
14. The customer's perception is what's viewed as most important, rather than a so-called hard-nosed view of reality. When you're right and the customer is way off base you will nonetheless respond to the customer's view--even when it costs you a substantial amount of money.
15. There is an explicit philosophy statement, that deals with "the way we perceive and treat customers." It is widely distributed and constantly (and explicitly) reinforced in almost every setting, from the Fourth of July picnic to the annual performance review.
16. Managers at all levels regularly spend time performing all primary customer-support tasks.
17. The number one "it" is a passion for tiny customer-related improvements in every department.

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CREECH'S LAWS

General Creech, as he prepared to turn over his command in the fall of 1984, published a set of fifteen "organizational principles." Here they are:

1. Have a set of overarching principles and philosophies. Have an overall theme and purpose.
2. Use goals throughout--goals at all levels, from crews to senior command. There should be darned few of them--in general, paperwork should be kept to a minimum--and they should be clearly achievable--i.e., most people should end up as winners.
3. Measure productivity at several levels. But "don't strangle in paperwork." Also: "Micro-information should not be used to micro-management [that is, it should be used primarily to spur peer-versus-peer competition]." All information should be "oriented to the product."
4. Create leaders at many levels. With this goes a plea to "get leaders [e.g., dedicated managers] where the action is. Staff supports the line. Not vice versa."
5. Match authority and responsibility and instill a sense of responsibility. "Ninety-nine percent will accept responsibility if authority goes with it,; and authority should always be product-oriented, not function-oriented. "I'm not wild about accepting responsibility without authority," says the general. "Why should my people be?"
6. Set up internal competition and comparison where feasible. "Reward success" is the key corollary. The resultant pressure is high: "Nobody wants to report that his store is last, month after month."
7. Create a climate of pride. "Instill individual dignity. Provide challenge and opportunity to each. Intangibles matter."
8. Create a climate of professionalism. "Esprit is the critical measure."
9. Educate, educate, educate. By means, first and foremost, of regular feedback.
10. Communicate, communicate, communicate. Do not depend on the formal hierarchy; skip down several levels--regularly.

11. Create organizational discipline and loyalty. This is vital, but will inevitably "stifle initiative." Hence, specific devices must be in place to lead people to disregard the system and reward initiative.
12. Provide everyone with a stake in the outcome. Make each job meaningful. Reward good performance (lavishly) in all areas.
13. Make it better. Create a sense of individual and organizational worth. Create an "optimistic organization." Provide a climate for continuous change. Above all: "The leader is not just a scorekeeper and steward. He is responsible for creating something new and better."
14. Make it happen: "Vigorous leadership at all levels is the key." The leader is at once responsible for creating "the dynamic spark" and simultaneously "working the details" that make it happen.
15. Make it last.

PEOPLE - HOW TO TREAT THEM

1. People are people ... not personnel.
2. People don't dislike work ... help them to understand mutual objectives and they'll drive themselves to unbelievable excellence.
3. The best way to really train people is with an experienced mentor ... and on the job.
4. People have ego and development needs ... and they'll commit themselves only to the extent that they can see ways of satisfying these needs.
5. People cannot be truly motivated by anyone else ... that door is locked from the inside; they should work in an atmosphere that fosters self-motivation ... self-assessment ... and self-confidence.
6. People should work in a climate that is challenging, invigorating, and fun ... and the rewards should be related as directly as possible to performance.
7. When people are in an atmosphere of trust, they'll put themselves at risk; only through risk is there growth ... reward ... self-confidence ... leadership.