Assessing and Developing Adaptable Leaders for an Age of Uncertainty

“Institutionally, the ability to be agile enough is the gut issue in leading an organization today.”

James McNerney
CEO
BOEING
Assessing Flexible Leadership as a Mastery of Opposites
Rob Kaiser & Darren Overfield

Relax, It's Only Uncertainty
Randall P. White

The Many Faces of Learning Agility
Kenneth P. De Meuse, Guangrong Dai, & George S. Hallenbeck

Assessing and Developing Adaptable Leaders for an Age of Uncertainty

Handouts available at www.kaplancdevries.com
Assessing Flexible Leadership as a Mastery of Opposites

Robert Kaiser
Darren Overfield
Kaplan DeVries Inc.

In concurrent session, Assessing and Developing Adaptable Leadership for an Age of Uncertainty

Flexibility is crucial...

But how to assess it?

The obvious answer...

**Trait — flexibility as a generic tendency to adapt behavior to changing circumstances**

**Items**
- Varies approach with the situation
- Makes adjustments in behavior
- Takes ideas different from own seriously
- Not set in his/her ways
- Thinks in terms of trade-offs

- Not compelling conceptually
- Not behaviorally precise; hard to act on
- Weakly related to effectiveness


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An Alternative

**Mastery of Opposites — capability and skill with complementary behaviors that seem incompatible**

- Conceptual/theoretical basis
- Behaviorally specific/prescriptive
- More predictive of effectiveness

Wisdom of opposites


**Tough-Love**

- Human Relations
- Rational Goals

Push for productivity while also building cohesion & morale

**Practical-Vision**

- Open Systems
- Internal Processes

Adapt/introduce change and maintain stability & predictability

“...playing multiple, even competing roles, in a highly integrated & complementary way” Hooijberg & Quinn (1992). Behavioral complexity

“...leader effectiveness entails the mastery of countervailing behavior patterns“ Zaccaro (2001). Nature of executive leadership

“...using opposing approaches, unrestricted by bias for one and prejudice against the other.” Kaplan & Kaiser (2006). The versatile leader

Assessment

- Behavioral content
- Measurement method
- Quantifying a higher-order concept - integrating opposing scores
**Behavior**

**Tough-Love**
- Initiation
  - Autocratic
  - Transactional
  - Long-term
- Consideration
  - Participative
  - Transformational
  - Change
  - Innovation

**Practical-Vision**
- Task-oriented
- People-oriented
- Short-term
- Long-term
- Stability
- Efficiency
- Collaboration and supportive
- Self-assertive and directive
- Implementation and Tactical Details
- Efficiency and Conservation
- Stability and Reliability
- Empowerment and Delegation
- Democratic and Participative
- Supportive and Considerate
- Vision and Direction Setting
- Growth and Expansion
- Innovation and Adaptation
- Realizing efficiency through command and control
- Inspiring people with a vision for change

**Management**
- Self-assertive and directive
  - Taking Charge and Initiative
  - Autocratic and Decisive
  - Expectations and Accountability

**Leadership**
- Collaborative and supportive
  - Empowerment and Delegation
  - Democratic and Participative
  - Supportive and Considerate

**Interpersonal**
- How

**Organizational**
- What
Measurement

1-to-5 rating scales
- “Opposites” are positively related

![Scatter plot showing the relationship between People-oriented and Task-oriented ratings with r = +.49]


New response scale

N = 484 middle to senior managers

Methods Matter

$\text{Enabling}$

$\text{Operational}$

$\text{Polarity effect}$

$r = -0.59$

$r = -0.21$

$r = +0.49$
Integrating opposing scores

Different response scales, different methods

1. not at all
2. Once in while
3. Sometimes
4. Fairly often
5. Frequently, if not always

Too little
The right amount
Too much

Much too little
Barely too little
Barely too much
Much too much

Integrative balance = \[(k-1) - (|X - Y|) \] * \[(X + Y)/2\]
- X and Y are opposites to be integrated
- X and Y are measured on a k-point scale


“Too much/Too little” Ratings

**Predicting effectiveness**

**Leadership Versatility Index®**

- **Forceful**
  - taking the lead and pushing for performance
- **Enabling**
  - creating conditions for others to lead and contribute
- **Operational**
  - focusing the organization on the short term
- **Strategic**
  - positioning the organization for the future

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**How You Lead**

**Forceful Leadership**
- taking the lead and pushing for performance
  - Takes charge
  - Declares/decides
  - Pushes

**Enabling Leadership**
- creating conditions for others to lead and contribute
  - Empowers
  - Listens/includes
  - Supports

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**What You Lead**

**Operational Leadership**
- focusing the organization on the short term
  - Execution
  - Efficiency
  - Order

**Strategic Leadership**
- positioning the organization for the future
  - Direction
  - Growth
  - Innovation
Effectiveness indicators

- **Perceived overall effectiveness**
  Single-item rating on 10-pt scale,
  5 = “adequate”, 10 = “outstanding”
  (peer ratings)

- **Team performance**
  Vitality (subordinate ratings of morale, engagement, & cohesion)
  Productivity (superior ratings of quantity, quality, & overall output)


Research method

- **484 managers**
  126 GM or Executive
  204 Functional head, Middle manager
  110 Manager or supervisor
  44 did not indicate level

- **Mostly N. American (<20% EU, AP)**

- **Each rated by avg of 13 coworkers**
  2 Superiors
  5 Peers
  6 Subordinates

- **Method**
  Use avg. All Coworker ratings of behavior to predict effectiveness
  Peer ratings of Overall Effectiveness
  Subordinate ratings of Team Vitality
  Superior ratings of Team Productivity
### Flexibility & leader effectiveness

<table>
<thead>
<tr>
<th>How</th>
<th>Overall Effectiveness (peers) β</th>
<th>Team Vitality (subs) β</th>
<th>Team Productivity (boss) β</th>
</tr>
</thead>
<tbody>
<tr>
<td>Forceful-Enabling Versatility</td>
<td>.30***</td>
<td>.32***</td>
<td>-.02</td>
</tr>
<tr>
<td>Strategic-Oper’l Versatility</td>
<td>.38***</td>
<td>.16*</td>
<td>.38***</td>
</tr>
</tbody>
</table>

**Model R**

|                       | .64*** | .46*** | .36*** |

*N = 484 middle to senior managers. Versatility based on average rating across all coworkers. Effectiveness based on peer ratings; Team Vitality based on subordinate ratings; Team Productivity based on superior ratings.*

### Leadership Versatility Index®

**Leadership Versatility 78%**
10. Pays attention to detail—has a finger on the pulse of day-to-day activities.

11. Thinks broadly—takes a big-picture perspective.

**Relative Advantages**

**Trait Approach**
- Simple and intuitive, familiar method
- Requires fewer items, esp. important if required to use elaborate competency model
- Straightforward computation of scores (compared to “black box” in Mastery of Opposites methods)

**Mastery of Opposites**
- Reflects the tensions and tradeoffs managers are familiar with
- More highly related to leadership effectiveness
- Behaviorally specific; more diagnostic value
- Dovetails with theory
  - Situational (“when to do what”)
  - Developmental (Jung, Erickson)
Applications

- Use existing tools based on mastery of opposites
- Apply methodology to existing competency models/360s
- Create your own assessment protocol

Create your own

- Construct leadership models in terms of opposites
- Cover interpersonal how and organizational what
- Don’t assume “more is better”—assess for too little and too much
“The test of a first-rate intelligence is the ability to hold two opposed ideas in the mind at the same time, and still retain the ability to function.”

F. Scott Fitzgerald
"The Crack-Up" (1936)