

# Situational Leadership

AmeriCorps Launch Event 2019

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## Situational Leadership Case Studies

**You have recently noticed a performance problem with one of your people. He demonstrated an “I don’t care” attitude. Only your constant prodding has brought about task completion. You suspect he may not have enough expertise to complete the high-priority task you have given to him. You would...**

- A) Specify the steps he needs to take and the outcomes you want. Clarify timelines and paperwork requirements. Frequently check to see if the task is progressing as it should
- B) Specify the steps he needs to take and outcomes you want. Ask for his ideas and incorporate them if appropriate. Ask him to share his feeling about the assignment. Check to see that the task is progressing as it should.
- C) Involve him in problem solving for this task. Offer your help and encourage him to use his ideas to complete the project. Ask him to share his feelings about the assignment. Periodically check in to see how things are going.
- D) Let him know how important the task is. Ask him to outline his plan for completion and to send you a copy. Ask him to check back if he has any problems.

**One of your staff members is feeling insecure about a job you have assigned to him. He is highly competent, and you know that he has the skills to successfully complete the task. The deadline for compilation is near. You would...**

- A) Let him know your concerns about the impending deadline. Help him explore alternative action steps and encourage him to use his own ideas. Periodically check with him to lend support
- B) Discuss your concerns about the impending deadline. Develop an action plan for him to follow and get his reactions. Include his modifications if possible, but make sure he follows your general outline. Regularly check with him to see how things are going.
- C) Outline the steps you want him to follow. Specify the reasons for completing the assignment on time. Closely monitor his progress.
- D) Ask him if there are any problems but let him resolve the issue himself. Without pushing him, remind him of the impending deadline. Ask him to get back with an update.

**You were recently assigned a new employee who will perform an important job in your unit. Even though she is inexperienced, she is enthusiastic and feels she has the confidence to do the job. You would...**

- A) Allow her time to determine what the job requires and how to do it. Let her know why the job is important. Ask her to contact you if she needs help. Track her performance.
- B) Specific the results you want and when you want them. Clearly define the steps she should take to achieve results. Show her how to do the job. Closely monitor her progress.
- C) Discuss the results you want and when you want them. Clearly define the steps she can take to achieve results. Explain why these steps are necessary and get her ideas. Use her ideas if possible but make sure your general plan is followed. Frequently check her progress.
- D) Ask her how she plans to undertake the job. Help her explore the problems she anticipates by generating possible solutions. Encourage her to carry out her plan. Be available to listen to her concerns. Periodically check her progress.

**Your staff has asked you to consider changes in their work schedule due to an expansion in the customer base. Their changes make good sense to you. Members are very competent and work well together. You would...**

- A) Help them explore alternative scheduling possibilities. Be available to facilitate their group discussion. Support the plan they develop. Check to see how they implement their schedule.
- B) Design the work schedule yourself. Explain the rationale behind your design. Listen to their reactions, ask for their ideas, and use their recommendations when possible. Check to see that the schedule is being followed.
- C) Allow the staff to set a work schedule on their own. Let them implement their plan after you approve it. Check back at a later date to make sure that the new schedule is working out for them.
- D) Design the work schedule yourself. Explain how the schedule will work and answer any questions. Frequently check to see that the schedule is being followed.

*Skill #1: Diagnose a Peron's **commitment** level vs their **competency***

1. Think of a time when you were starting something new. You were a beginner – taking on a project or learning a new skill. What are some characteristics or descriptors of yourself at that level of development?

HIGH COMPETENCE — • —	MODERATE TO HIGH COMPETENCE — • —	LOW TO SOME COMPETENCE — • —	LOW COMPETENCE — • —
HIGH COMMITMENT	VARIABLE COMMITMENT	LOW COMMITMENT	HIGH COMMITMENT
<b>D4</b>	<b>D3</b>	<b>D2</b>	<b>D1</b>

DEVELOPED ←————→ DEVELOPING

2. Think of a time when you were still learning how to do something but you weren't just beginning. You had not yet mastered all the skills. You might have been making progress but you might have been frustrated because you now "knew what you didn't know as a beginner." What are some characteristics or descriptors of yourself at that level of development?

HIGH COMPETENCE — • —	MODERATE TO HIGH COMPETENCE — • —	LOW TO SOME COMPETENCE — • —	LOW COMPETENCE — • —
HIGH COMMITMENT	VARIABLE COMMITMENT	LOW COMMITMENT	HIGH COMMITMENT
<b>D4</b>	<b>D3</b>	<b>D2</b>	<b>D1</b>

DEVELOPED ←————→ DEVELOPING

3. Think of a time when you could do the skill or task but weren't consistently confident in your ability to do it. You were nervous. What are some characteristics or descriptors of yourself at that level of development?

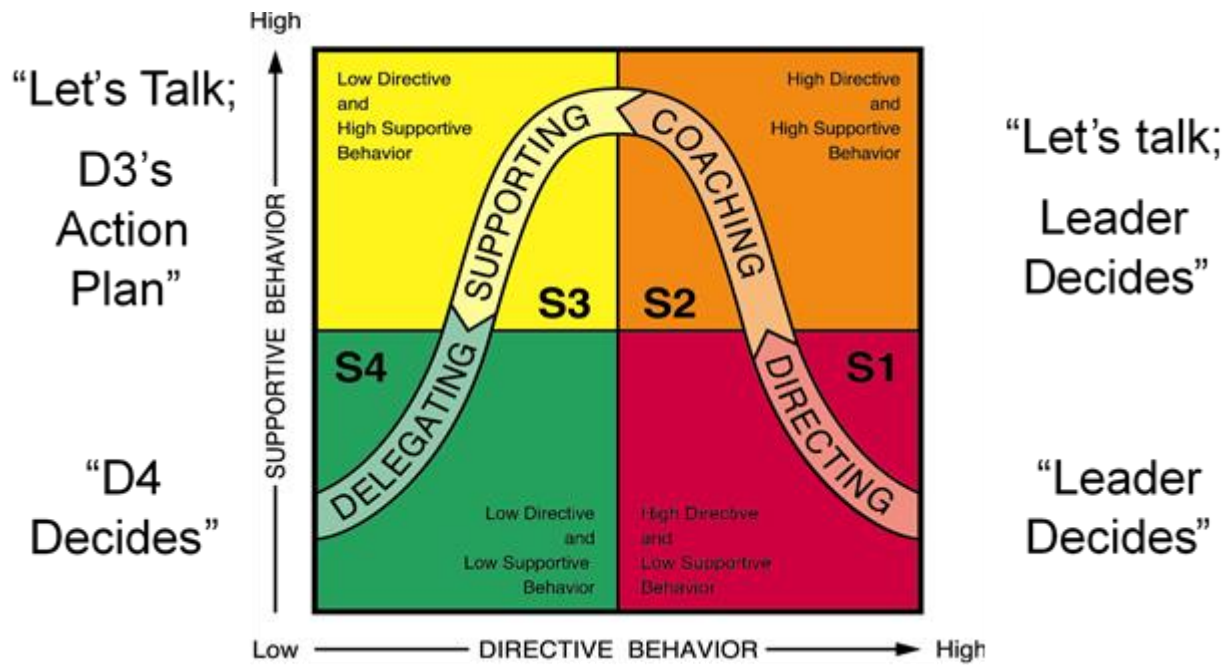
HIGH COMPETENCE — • —	MODERATE TO HIGH COMPETENCE — • —	LOW TO SOME COMPETENCE — • —	LOW COMPETENCE — • —
HIGH COMMITMENT	VARIABLE COMMITMENT	LOW COMMITMENT	HIGH COMMITMENT
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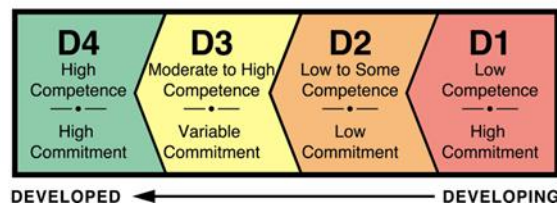
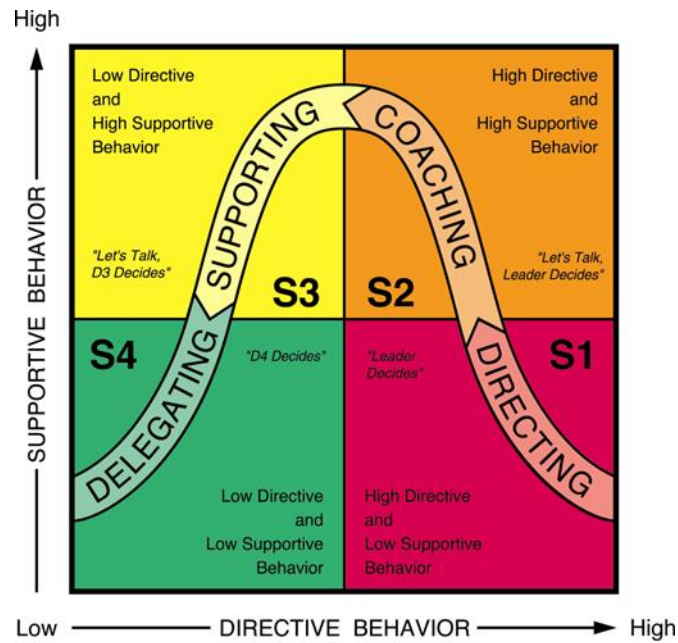
4. Finally, think of a time when you were an expert at something. You had mastered a skill and had delivered a level of unconscious competence. What are some characteristics or descriptors of yourself at that level of development?

HIGH COMPETENCE — • —	MODERATE TO HIGH COMPETENCE — • —	LOW TO SOME COMPETENCE — • —	LOW COMPETENCE — • —
HIGH COMMITMENT	VARIABLE COMMITMENT	LOW COMMITMENT	HIGH COMMITMENT
<b>D4</b>	<b>D3</b>	<b>D2</b>	<b>D1</b>

DEVELOPED ←————→ DEVELOPING



Based on diagnosing the person’s commitment level and competency level...



## **Skill #2: The ability to use a variety of leadership styles comfortable**

### **Directive Leadership Behavior**

*Directive Behavior* is the extent to which a leader

- Sets goals and clarifies expectations
- Tells and shows an individual what to do, when, and how to do it
- Closely supervises, monitors and evaluates performance

#### **Five Key Directive Leadership Behaviors**

- Structure
- Organize
- Teach
- Supervise
- Evaluate

### **Supportive Leadership Behavior**

*Supportive Behavior* is the extent to which a leader

- Engages in more two-way communication
- Listens and provides support and encouragement
- Involves the other person in decision making
- Encourages and facilitates self-reliant problem-solving

#### **Five Key Supportive Leadership Behaviors**

- Asks for Input
- Listens
- Facilitates Problem Solving
- Explains Why
- Encourages

## Leadership Style Flexibility Situation #1

Setting: Sandy, a new employee in the marketing department of a large company, is meeting with Casey, the manager.

Directive or  
Supportive?

Casey: Good morning Sandy. How are you?

Sandy: Good morning Casey. I'm fine, thanks.

Casey: Come over and sit down, and let's get organized on how we're going to track the results of the ad campaign for our new product.

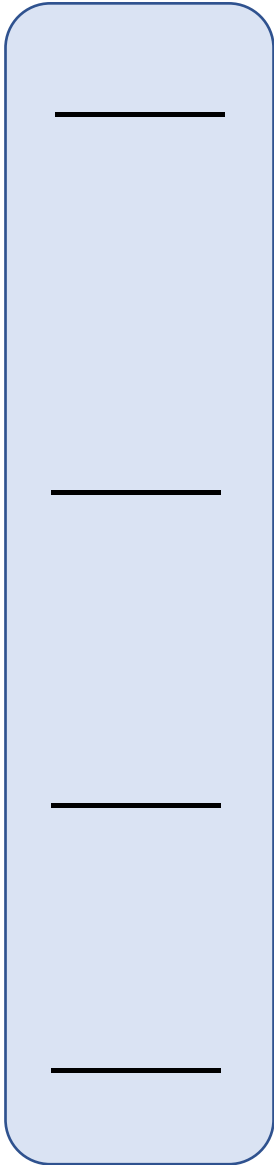
Sandy: I'm looking forward to working on this project, and I feel I can do a good job.

Casey: Good Sandy, so let's get started on an action plan. (*Sandy grabs a pen and a piece of paper*) What we've done thus far is to set up a tracking system so that we know exactly which sales are coming from which ad. Right?

Sandy: Yes, that's right. What's next?

Casey: The next step of the process is to take the data that comes in and input into the computer. That way we will be able to analyze it easily. Once that's up and running, we can do some statistical analysis of the data.

Sandy: This is helpful. I'm getting a sense of what to do next and of where we are ultimately going.



Casey: Sandy, I need you to talk to Sam over in the data processing unit. He will help you understand our software so that you can manipulate the data and know how we're doing with each version of the ad campaign.

Sandy: Good, I've never worked with this kind of software before and I can use some additional training.

Casey: Good. So why don't you go over what you think the next steps are with me so I can be sure I've communicated them clearly?

Sandy: Fine. I'm going to take the data and input it. And, I'm going to talk to Sam to learn more about how to do the data analysis.

Casey: Right. Now, do you have any questions?

Sandy: No, I'm ready to go.

Casey: Great, if you think of anything, let me know. Let's plan to meet next Monday at 9:00 AM to discuss your progress.

Sandy: Fine, see you then.

1. Were most of Casey's comments directive or supportive?
  
2. Who talked more?
  
3. What Development level was Sandy?
  
4. What leadership style was Casey using with Sandy?



## Leadership Style Flexibility Situation #2

Setting: Terry, an experienced employee in a sales organization is meeting with Pat, the manager.

Directive or  
Supportive?

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Terry: Excuse me, Pat, I heard you wanted to talk to me. I know my monthly reports were late. Is that the problem?

Pat: Yeah, Terry, come in. I wanted to ask you about the reports and why they were late – and two sections were incomplete. This is the second time this month. What seems to be the problem?

Terry: I guess I've been really busy.

Pat: There's a lot going on right now. Is the workload too much?

Terry: The added workload has become an issue. Last week it was either get a deal closed or do the reports. I chose to get the deal done. Then when I got to the report, I must have been in too big of a hurry. I didn't know some were incomplete.

Pat: It sounds like you have a lot going on right now and that, like most of us, you hate all the paperwork.

Terry: Yeah, I guess so. There's just so much of it! These summery reports seem redundant and unimportant – at least not as important as everything else I've got to do. Why do we have to make such a big deal over getting paperwork in by a certain date?

Pat: I know how you feel. I don't know too many people who actually like paperwork. But, it is important. With the way our organization works and with all the regulators, we've got to have timely, accurate and detailed reporting.

Terry: I guess I never thought about what those reports were really for. So, the dilemma is how to get it all done.

Pat: You're right. What ideas do you have?

Terry: I've thought about it and I think there are three options:

1. I could delegate some of my tasks to Fred. Fred's made it clear that he would like to take on more responsibility, and I think he's ready. This would give him an idea of what my job is really like. On the other hand, I'd have to take the time to retrain him and bring him up to speed and that would obviously require more of my time.
2. You could lobby our VP to change the monthly reporting to quarterly. It might be more efficient and less demanding.
3. We would reduce my work. But that would mean someone else would have to take up the slack.

Pat: So, what do you think?

Terry: My recommendation is the first option. Even though it will take me time in the short run to train and develop Fred, I believe it will pay off in the long run. It will give us a head start in building bench strength to deal with our growth.

Pat: You know Terry, over the past year you've been right on time and accurate with your paperwork. You're the one staff member I could always count on to help me get my reports in on time. You know what's required so if you think this is the best way to deal with the situation, let's put together a development plan together for Fred and get him started. Let me know what I can do to help.

Terry: I will, I promise.

1. Were most of Pat's comments directive or supportive?

2 Who talked more?

3. What Development level was Terry?

4. What leadership style was Pat using with Terry?

### Leadership Style Flexibility Situation #3

Setting: Lee is a supervisor at a high-tech company. His manager is Andy.

Directive or  
Supportive?

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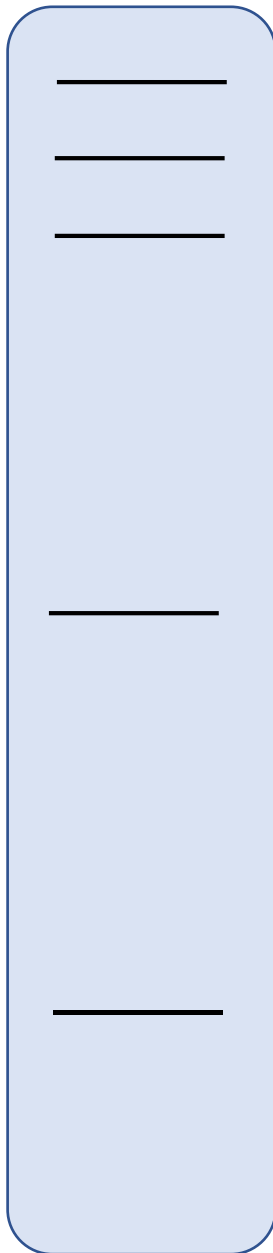
Lee: Good morning Andy. What did you want to see me about?

Andy: Lee, you know that we've been having some trouble with product quality in your area and in general with your work as a supervisor. Now, I feel that I probably have not provided the kind of direction you needed as you moved into a supervisory position, and I want to help resolve that problem. Lee, do you understand the importance of the fact that rejections in your area are up by 10 percent?

Lee: *(Discouraged)* Yes, I do.

Andy: Well, do you have any ideas as to what we might do to resolve this problem?

Lee: Well I admit I'm a little confused as to what to do. I've only been a supervisor for a short amount of time.



Andy: All right. Well, let me give you some suggestions and see what you think about them. What I would suggest is that you give all of your people a copy of our current quality standards and procedures. Then, be sure that each associate understands and is using these procedures. You understand the procedures and I know that you can explain them to your people.

Lee: I think so. Ok, I'll meet with my people this afternoon and tell them this is how it's going to be.

Andy: No Lee, I don't think I'd do it quite that way. Let's get together tomorrow at 9:00 AM and we'll go over the quality standards and procedures and discuss how to introduce and implement them with your people.

Lee: Ok

Andy: I know you can handle this job, Lee. I think you just need some time and maybe a little of guidance from me. Perhaps I haven't provided the guidance you've needed in the past, but now I'm going to. So, let's work together on this and see if we can correct this product quality problem.

Lee: Sounds good to me, Andy. See you tomorrow.

1. Were most of Andy's comments directive or supportive?

2 Who talked more?

3. What Development level was Lee?

4. What leadership style was Andy using with Lee?