



# **Situational Leadership**

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**Organizational Leadership**

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# Leader - Leadership



# Influence





# Leadership is ...

- “the process of influencing others to understand and agree about what needs to be done and how to do it, and the process of facilitating individual and collective efforts to accomplish shared objectives (Yukl, 2006, p. 8)
- “a process whereby an individual influences a group of individuals to achieve a common goal.” (Northouse, 2016, p. 6)
  - An influence process
  - Involves shared goals

# What about you?



# Leadership Style

1. SUM: 1, 7, 13, and 19 (trait emphasis)
2. SUM: 2, 8, 14, and 20 (ability emphasis)
3. SUM: 3, 9, 15, and 21 (skill emphasis)
4. SUM: 4, 10, 16, and 22 (behavior emphasis)
5. SUM: 5, 11, 17, and 23 (relationship emphasis)
6. SUM: 6, 12, 18, and 24 (process emphasis)





# Followers



**54% of leaders use one leadership style**

**34% use two styles**

**11% use three styles**

**1% use four styles**

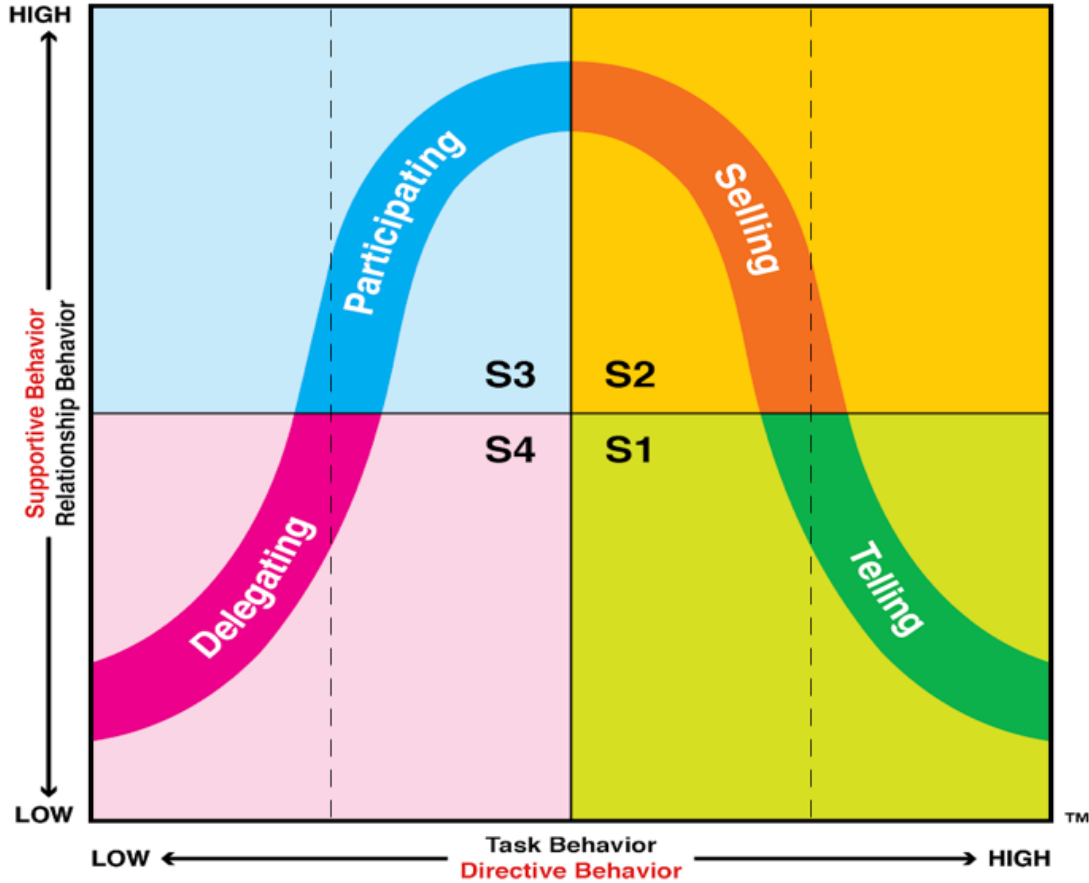
***Nearly 50% are using the wrong style at any given time!***

# Situational Leadership

- Recognizes – no one-size-fits-all
- Adaptive
  - to the situation
  - to the followers
- Meets the needs
  - of the followers
  - of the organization

# Situational Leadership®

## Influence Behaviors

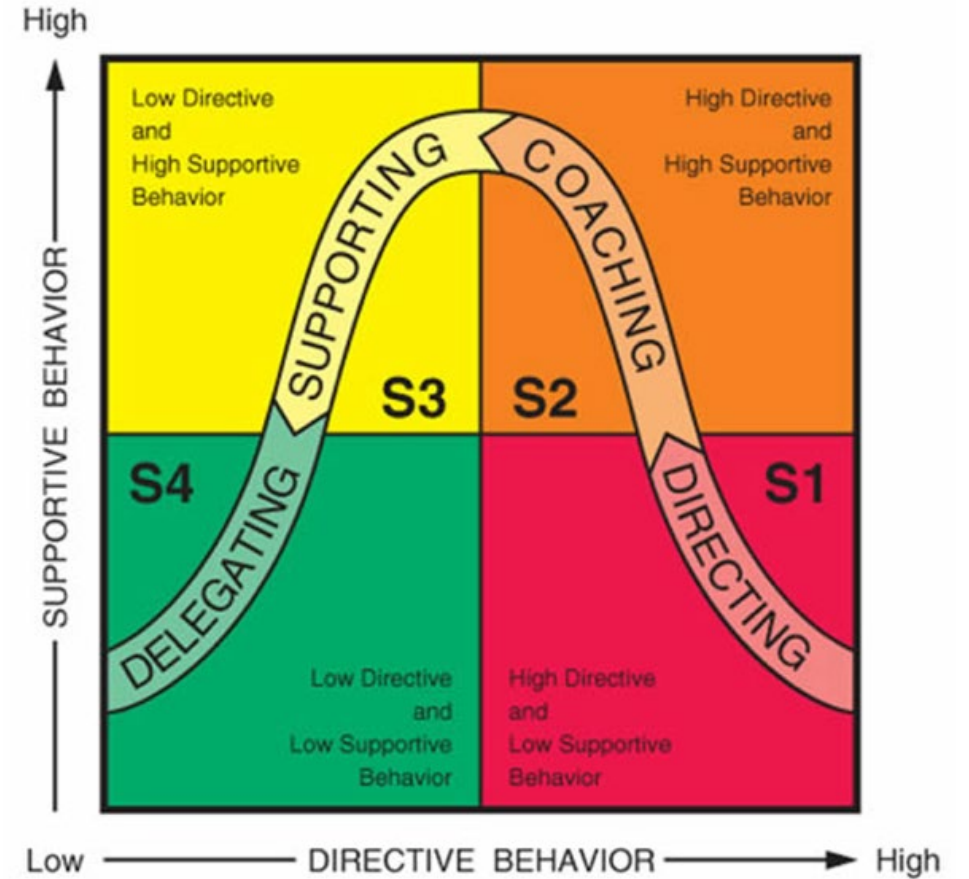


## Performance Readiness®

HIGH	MODERATE		LOW
R4	R3	R2	R1

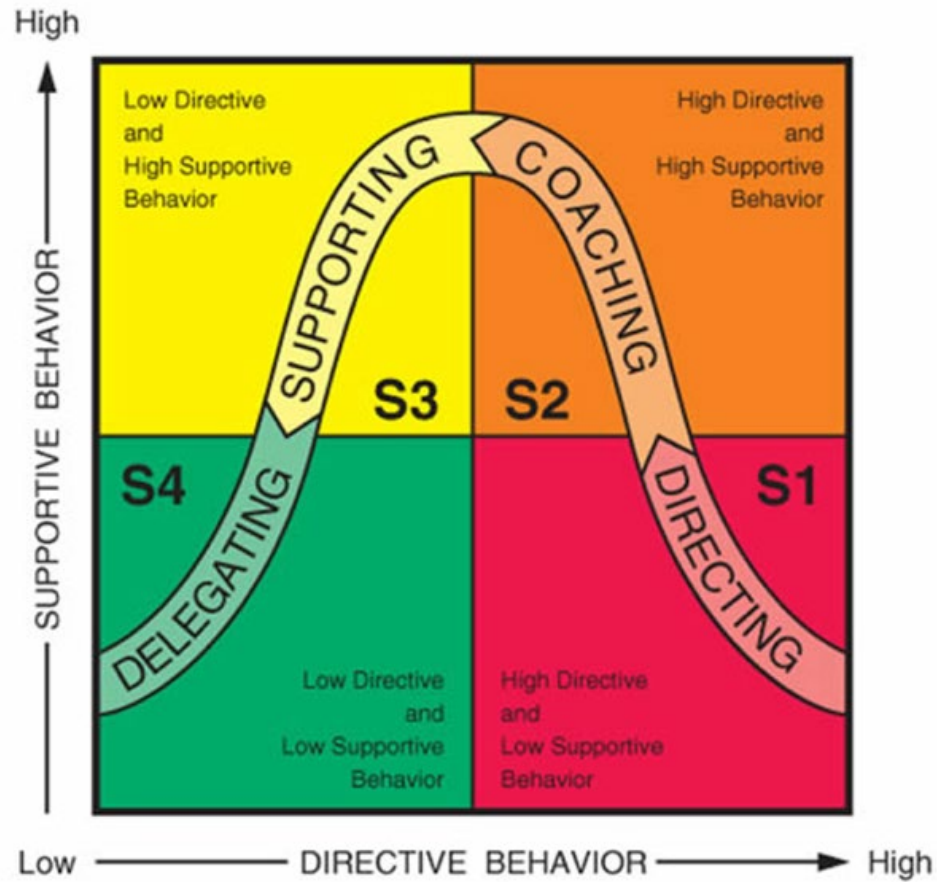
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# Situational Leadership® II Model



The SLII® model. The Ken Blanchard Companies

# Situational Leadership® II Model



DEVELOPED ← DEVELOPING

# Leadership Style/Approach

- **(S1) Directing (High Directing and Low Supporting)**
  - plans, shows, tells, monitors, & provides regular feedback
- **(S2) Coaching: (High Directing and High Supporting)**
  - explains, redirects, encourages, & praises
- **(S3) Supporting: (Low Directing and High Supporting)**
  - asks questions, facilitates, listens, encourages, & collaborates
- **(S4) Delegating: (Low Directing and Low Supporting)**
  - empowers, provides resources, trusts, affirms, & challenges

# Follower Readiness

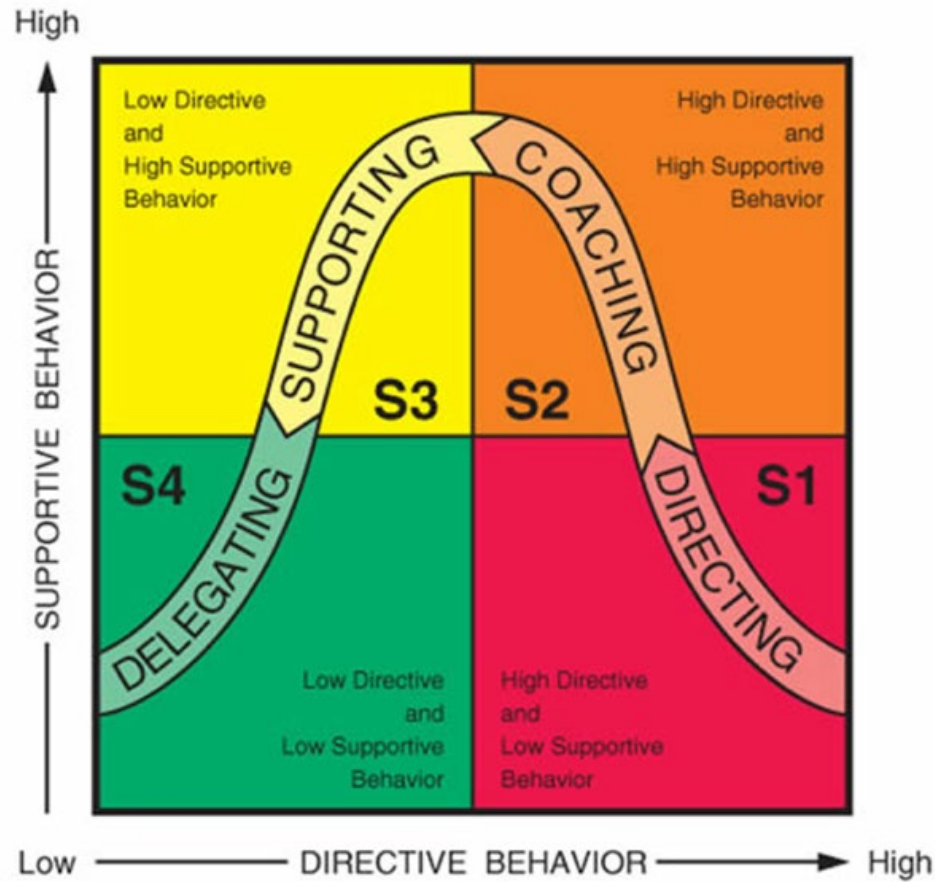
- **(D1) Enthusiastic Beginner (Low Competence / High Commitment)**
  - inexperienced but eager to learn  
*(Leader, S1: Directing)*
- **(D2) Disillusioned Learner (Low Competence / Low Commitment)**
  - inexperienced or minimal experience, possibly inconsistent, discouraged, or overwhelmed  
*(Leader, S2: Coaching)*
- **(D3) Capable but Cautious Performer (High Competence / Low Commitment)**
  - experienced & skilled, but lacks confidence, self-critical, may be apathetic  
*(Leader, S3: Supporting)*
- **(D4) Self-Reliant Achiever (High Competence / High Commitment)**
  - experienced, consistent, reliable, quality output, self-assured, self-reliant  
*(Leader, S4: Delegating)*

# More insights about you! 😊





# Situational Leadership® II Model



DEVELOPED ← ————— → DEVELOPING

# Leader/Follower (Task/Relationship)

- **(S1) Directing**  
(High Directing / Low Supporting)
- **(S2) Coaching:**  
(High Directing / High Supporting)
- **(S3) Supporting:**  
(Low Directing / High Supporting)
- **(S4) Delegating:**  
(Low Directing / Low Supporting)
- **(D1) Enthusiastic Beginner**  
(Low Competence / High Commitment)
- **(D2) Disillusioned Learner**  
(Low Competence / Low Commitment)
- **(D3) Capable but Cautious Performer**  
(High Competence / Low Commitment)
- **(D4) Self-Reliant Achiever**  
(High Competence / High Commitment)

# Which do you choose?

- Reminder: Not one-size-fits-all
- Task-Specific
  - Evaluate the task/goal
- Follower-Specific
  - Evaluate the follower's readiness level
    - Competence/development
    - Commitment/enthusiasm
- Apply the appropriate style

# Five Developmental Steps

- Tell
- Show
- Observe performance
- Praise progress, OR
- Redirect





# The Heart of the Matter

- **Know your people**
- **Be Inclusive**
- **Be Considerate**
- **Be Available**
- **Be a People Developer**
- **Be Grateful**







**THANK**  
*You!*

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## Situational Leadership Style Summary/Self Assessment

*Adapted from: Hersey and Blanchard*

**Self-assessment questions:** Read through the Situation questions and then choose the response (only one) from the corresponding Alternative Action statements that most appeals to you or that you feel seems the most characteristic of you. In some cases none of the responses may be appealing or characteristic of you. Nonetheless, please select the statement that you prefer or feel suits you best.

Situation	Alternative Action
1. Your group is not responding lately to your friendly conversation and obvious concern for their welfare. Their performance is declining rapidly.	<ul style="list-style-type: none"> <li>A. Emphasize the use of uniform procedures and the necessity for task accomplishment.</li> <li>B. Make yourself available for discussion but do not push your involvement.</li> <li>C. Talk with them and then set goals.</li> <li>D. Intentionally do not intervene.</li> </ul>
2. 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.	<ul style="list-style-type: none"> <li>A. Engage in friendly interaction, but continue to make sure that all members are aware of their responsibilities and expected standards of performance.</li> <li>B. Take no definite action.</li> <li>C. Do what you can to make the group feel important and involved.</li> <li>D. Emphasize the importance of deadlines and tasks.</li> </ul>
3. 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.	<ul style="list-style-type: none"> <li>A. Work with the group and together engage in program solving.</li> <li>B. Let the group work it out.</li> <li>C. Act quickly and firmly to correct and redirect.</li> <li>D. Encourage the group to work on the problem and be supportive of their efforts.</li> </ul>
4. You are considering a change. Your group has a fine record of accomplishment. They respect the need for change.	<ul style="list-style-type: none"> <li>A. Allow group involvement in developing the change, but do not be too directive.</li> <li>B. Announce changes and then implement with close supervision.</li> <li>C. Allow the group to formulate its own directive.</li> <li>D. Incorporate group recommendations, but you direct the change.</li> </ul>
5. 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 it the past. They have continually needed reminding to have their tasks done on time.	<ul style="list-style-type: none"> <li>A. Allow the group to formulate its own direction.</li> <li>B. Incorporate group recommendations, but see that objectives are met.</li> <li>C. Redefine roles and responsibilities and supervise carefully.</li> <li>D. Allow group involvement in determining roles and responsibilities but do not be too directive.</li> </ul>
6. You stepped into an efficiently run group. The previous leader tightly controlled the situation. You want to maintain a productive situation, but would like to begin having more time building interpersonal relationships among members.	<ul style="list-style-type: none"> <li>A. Do what you can do to make the group feel important and involved.</li> <li>B. Emphasize the importance of deadlines and tasks.</li> <li>C. Intentionally do not intervene.</li> <li>D. Get the group involved in decision-making, but see that objectives are met.</li> </ul>
7. 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.	<ul style="list-style-type: none"> <li>A. Define the change and supervise carefully.</li> <li>B. Participate with the group in developing the change but allow members to organize the implementation.</li> <li>C. Be willing to make changes as recommended, but maintain control of the implementation.</li> <li>D. Be supportive in discussing the situation with the group but not too directive.</li> </ul>

**Situational Leadership Style Summary/Self Assessment**  
*Adapted from: Hersey and Blanchard*

<b>Situation</b>	<b>Alternative Action</b>
8. Group performance and interpersonal relations are good. You feel somewhat unsure about your lack of direction in the group.	<ul style="list-style-type: none"> <li>A. Leave the group alone.</li> <li>B. Discuss the situation with the group and then you initiate necessary changes.</li> <li>C. Redefine goals and supervise carefully.</li> <li>D. Allow group involvement in setting goal, but don't push.</li> </ul>
9. You have been appointed to give leadership to a study group that is far overdue 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. Potentially they have the talent necessary to help.	<ul style="list-style-type: none"> <li>A. Let the group work out its problems.</li> <li>B. Incorporate group recommendations, but see that objectives are met.</li> <li>C. Redefine goals and supervise carefully.</li> <li>D. Allow group involvement in setting goals, but do not push.</li> </ul>
10. Your group, usually able to take responsibility, is not responding to your recent redefining of job responsibilities as a result of one member leaving the city.	<ul style="list-style-type: none"> <li>A. Allow group involvement in redefining standards but don't take control.</li> <li>B. Redefine standards and supervise carefully.</li> <li>C. Avoid confrontation by not applying pressure, leave situation alone.</li> <li>D. Incorporate group recommendations, but see that new job responsibilities are met.</li> </ul>
11. You have been promoted to a leadership position. The previous leader was involved in the affairs of the group. The group has adequately handled its tasks and direction. Interpersonal relationships in the group are good.	<ul style="list-style-type: none"> <li>A. Take steps to direct the group towards working in a well-defined manner.</li> <li>B. Involve the group in decision-making and reinforce good contributions.</li> <li>C. Discuss past performance with the group and then you examine the need for new practice.</li> <li>D. Continue to leave the group alone.</li> </ul>
12. Recent information indicates some internal difficulties among group members. 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 tasks.	<ul style="list-style-type: none"> <li>A. Try out your solution with the group and examine the need for new procedures.</li> <li>B. Allow group members to work it out themselves.</li> <li>C. Act quickly and firmly to correct and redirect.</li> <li>D. Participate in problem discussion while providing support for group members.</li> </ul>

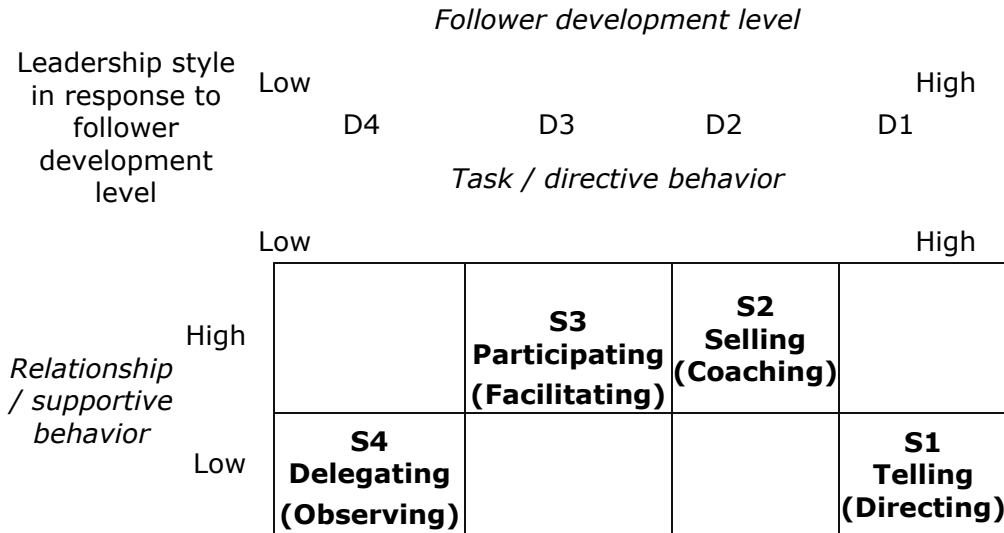
**Situational Leadership Style Summary/Self Assessment**  
*Adapted from: Hersey and Blanchard*

**Scoring your self-assessment:** Circle the responses from your self-assessment Situation questions on the scoring sheet below. Add up each column to determine your preferred leadership style according to the Hersey and Blanchard model.

SITUATIONS	ALTERNATIVE ACTIONS				
	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
<b>TOTAL</b>					
<b>LEADERSHIP STYLE</b>	TELLING (DIRECTING)	SELLING (COACHING)	PARTICIPATING (FACILITATIING)	DELEGATING (OBSERVING)	

**Situational Leadership Style Summary/Self Assessment**  
*Adapted from: Hersey and Blanchard*

**Situational Leadership Model:** Situational Leadership depends on the readiness of the followers and the situation.



<p>Leaders should adapt their style to follower development style (or 'maturity'), based on how ready and willing the follower is to perform required tasks (that is, their competence and motivation).          There are four leadership styles (S1 to S4) that match the development levels (D1 to D4) of the followers.          The four styles suggest that leaders should put greater or less focus on the task in question and/or the relationship between the leader and the follower, depending on the development level of the follower.          If the leader focused more on the relationship, the follower may become confused about what must be done and what is optional.          The leader thus maintains a clear 'do this' position to ensure all required actions are clear.</p>	
<p><b>S3: Participating / Facilitating / Supporting</b>  <i>Follower:</i> D3: High competence, variable commitment / Able but unwilling or insecure  <i>Leader:</i> Low task focus, high relationship focus          When the follower can do the job, but is refusing to do it or otherwise showing insufficient commitment, the leader need not worry about showing them what to do, and instead is concerned with finding out why the person is refusing and thence persuading them to cooperate.          There is less excuse here for followers to be reticent about their ability, and the key is very much around motivation. If the causes are found then they can be addressed by the leader.          The leader thus spends time listening, praising and otherwise making the follower feel good when they show the necessary commitment.</p>	<p><b>S2: Selling / Coaching</b>  <i>Follower:</i> D2: Some competence, variable commitment / Unable but willing or motivated  <i>Leader:</i> High task focus, high relationship focus          When the follower can do the job, at least to some extent, and perhaps is over-confident about their ability in this, then 'telling' them what to do may demotivate them or lead to resistance. The leader thus needs to 'sell' another way of working, explaining and clarifying decisions.          The leader thus spends time listening and advising and, where appropriate, helping the follower to gain necessary skills through coaching methods.          Note: S1 and S2 are leader-driven.</p>
<p><b>S4: Delegating / Observing</b>  <i>Follower:</i> D4: High competence, high commitment / Able and willing or motivated  <i>Leader:</i> Low task focus, low relationship focus          When the follower can do the job and is motivated to do it, then the leader can basically leave them to it, largely trusting them to get on with the job although they also may need to keep a relatively distant eye on things to ensure everything is going to plan.          Followers at this level have less need for support or frequent praise, although as with anyone, occasional recognition is always welcome.          Note: S3 and S4 are follower-led.</p>	<p><b>S1: Telling / Directing</b>  <i>Follower:</i> D1: Low competence, low commitment / Unable and unwilling or insecure  <i>Leader:</i> High task focus, low relationship focus          When the follower cannot do the job and is unwilling or afraid to try, then the leader takes a highly directive role, telling them what to do but without a great deal of concern for the relationship. The leader may also provide a working structure, both for the job and in terms of how the person is controlled.          The leader may first find out why the person is not motivated and if there are any limitations in ability. These two factors may be linked, for example where a person believes they are less capable than they should be may be in some form of denial or other coping. They follower may also lack self-confidence as a result.</p>

## SLII® Questionnaire: Sample Items

*Purpose:* The purpose of this questionnaire is to explore how different styles of leadership in the situational approach are used depending on the development level of the followers.

*Instructions:* Look at the following four leadership situations, from Blanchard, Zigarmi, and Zigarmi (1992), and indicate which SLII® leadership style is needed in each situation provided in the answer options beneath each statement.

<b>Situation</b>	<b>A</b>	<b>B</b>	<b>C</b>	<b>D</b>
1. Because of budget restrictions imposed on your department, it is necessary to consolidate. You are thinking of asking a highly capable and experienced member of your department to take charge of the consolidation. This person has worked in all areas of your department and has the trust and respect of most of the staff. She is very willing to help with the consolidation.	A	B	C	D
A. Assign the project to her and let her determine how to accomplish it.				
B. Assign the task to her, indicate to her precisely what must be done, and supervise her work closely.				
C. Assign the task to her and provide support and encouragement as needed.				
D. Assign the task to her and indicate to her precisely what must be done but make sure you incorporate her suggestions.				
2. You have recently been made a department head of the new regional office. In getting to know your departmental staff, you have noticed that one of your inexperienced employees is not following through on assigned tasks. She is enthusiastic about her new job and wants to get ahead in the organization.	A	B	C	D
A. Discuss the lack of follow-through with her and explain the alternative ways this problem can be solved.				
B. Specify what she must do to complete the tasks but incorporate any suggestions she may have.				
C. Define the steps necessary for her to complete the assigned tasks and monitor her performance frequently.				
D. Let her know about the lack of follow-through and give her more time to improve her performance.				

situation, the leader has identified a person who appears to be highly competent, experienced, and motivated to direct the downsizing project. According to the SLII® model, this person is at Development Level 4, which calls for a delegative approach. Of the four response alternatives, it is the (A) response, "Assign the project to her and let her determine how to accomplish it," that best represents delegating (S4): low supportive-low directive leadership.

Situation 2 describes a problem familiar to leaders at all levels in nearly all organizations: lack of follow-through by an enthusiastic follower. In the given example, the follower falls in Development Level 1 because she lacks the experience to do the job even though she is highly motivated to succeed. The SLII® approach prescribes directing (S1) leadership for this type of follower. She needs to be told when and how to do her specific job. After she is given directions, her performance should be supervised closely. The correct response is (C), "Define the steps necessary to complete the assigned tasks and monitor her performance frequently."

Situation 3 describes a very different circumstance. In this situation, the followers seem to have developed some experience and an understanding of what is required of them, but they have lost some of their motivation to complete the goal. Their performance and commitment have stalled because of recent setbacks, even though the leader has been directing them closely. According to SLII®, the correct response for the leader is to shift to a more supportive coaching style (S2) of leadership. The action response that reflects coaching is (C), "Continue to define group activities but involve the group members more in decision making and incorporate their ideas."

Situation 4 describes some of the concerns that arise for a director attempting to identify the correct person to head a new sales campaign. The person identified for the position obviously has the skills necessary to do a good job with the new sales campaign, but he appears apprehensive about his own abilities. In this context, SLII® suggests that the director should use a supportive style (S3), which is consistent with leading followers who are competent but lacking a certain degree of confidence. A supportive style is represented by action response (C), "Listen to his concerns but assure him he can do the job and support his efforts."



3. Because of a new and very important unit project, for the past three months you have made sure that your staff members understood their responsibilities and expected level of performance, and you have supervised them closely. Due to some recent project setbacks, your staff members have become somewhat discouraged. Their morale has dropped, and so has their performance. A B C D
- A. Continue to direct and closely supervise their performance.
  - B. Give the group members more time to overcome the setbacks but occasionally check their progress.
  - C. Continue to define group activities but involve the group members more in decision making and incorporate their ideas.
  - D. Participate in the group members' problem-solving activities and encourage and support their efforts to overcome the project setbacks.
4. As a director of the sales department, you have asked a member of your staff to take charge of a new sales campaign. You have worked with this person on other sales campaigns, and you know he has the job knowledge and experience to be successful at new assignments. However, he seems a little unsure about his ability to do the job. A B C D
- A. Assign the new sales campaign to him and let him function on his own.
  - B. Set goals and objectives for this new assignment but consider his suggestions and involve him in decision making.
  - C. Listen to his concerns but assure him he can do the job and support his efforts.
  - D. Tell him exactly what the new campaign involves and what you expect of him, and supervise his performance closely.

*Source:* Adapted from *Game Plan for Leadership and the One Minute Manager* (Figure 5.20, Learning Activity, p. 5), by K. Blanchard, P. Zigarmi, and D. Zigarmi, 1992, Escondido, CA: Blanchard Training and Development (phone 760-489-5005). Used with permission.

### Scoring Interpretation

A short discussion of the correct answers to the brief questionnaire will help to explain the nature of SLII® questionnaires.

Situation 1 in the brief questionnaire describes a common problem faced by organizations during downsizing: the need to consolidate. In this particular

*(Continued)*