Handout 1.2: Situational Leadership – Hersey and Blanchard

The concept of varying management style according to the situation is known as ‘Situational Leadership’. It was developed by Ken Blanchard, the management guru who later became famous for his *One Minute Manager* series, and Paul Hersey.

**Leadership styles**
Blanchard and Hersey characterised leadership style in terms of the amount of direction and support that the leader provides to his or her followers. They categorised all leadership styles into four behaviour types, which they named S1 to S4.

- **S1: Directing Leaders** define the roles and tasks of the ‘follower’, and supervise them closely. Decisions are made by the leader and announced, so communication is largely one-way.

- **S2: Coaching Leaders** still define roles and tasks, but seek ideas and suggestions from the follower. Decisions remain the leader’s prerogative, but communication is much more two-way.

- **S3: Supporting Leaders** pass day-to-day decisions, such as task allocation and processes, to the follower. The leader facilitates and takes part in decisions, but control is with the follower.

- **S4: Delegating Leaders** are still involved in decisions and problem solving, but control is with the follower. The follower decides when and how the leader will be involved.

Of these, no one style is considered optimal; effective leaders need to be flexible, and must adapt themselves according to the situation. However, each leader tends to have a natural style, and in applying Situational Leadership she must know her intrinsic style.

**Development or maturity**
The optimum style will depend on the person being led. Blanchard and Hersey stated that the leader’s chosen style should be based on the competence and commitment of his or her followers. They categorised the possible development of followers into four levels, which they named D1 to D4.

- **D1: Low Competence, High Commitment**: they generally lack the specific skills required for the job in hand, however, when new in post, are eager to learn and willing to take direction.

- **D2: Some Competence, Low Commitment**: they may have some relevant skills, but won’t be able to do the job without help. The task or the situation may still be relatively new to them, they may be nervous or they may have become disillusioned or demotivated by their work.

- **D3: High Competence, Variable Commitment**: they are experienced and capable, but may lack the confidence to be more ambitious, or the motivation to make full use of their skills.

- **D4: High Competence, High Commitment**: they are experienced at the job, and comfortable with their own ability to do it well. They may even be more skilled than the leader.

Development levels are also situational. I might be generally skilled, confident and motivated in my job, but would still drop into Level D1 when faced, say, with a task requiring skills I don’t possess. For example, many managers are D4 when dealing with the day-to-day running of their department, but move to D1 or D2 when dealing with a sensitive employee issue.
### Concern for Relationships

<table>
<thead>
<tr>
<th>Supportive Behaviour</th>
<th>Coaching</th>
</tr>
</thead>
<tbody>
<tr>
<td>High Relationship and Low Task (S3 – D3)</td>
<td>High Task and High Relationship (S2 – D2)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Delegating</th>
<th>Directing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Low Task and Low Relationship (S4 – D4)</td>
<td>High Task and Low Relationship (S1 – D1)</td>
</tr>
</tbody>
</table>

### Directive Behaviour

<table>
<thead>
<tr>
<th>Maturity of followers</th>
<th>Mature</th>
<th>Immature</th>
</tr>
</thead>
</table>

### Concern for Task

#### Telling/directing
Follower: unable and/or unwilling  
Leader: high task focus, low relationship focus

When the follower cannot do the job or is not motivated, then the leader takes a highly directive role, telling them what to do, without a great deal of concern for the relationship. The leader may provide a working structure for the job and control systems.

This is taking a particularly managerial stance. It is perfectly natural when the employee is new in post, but harder with an older but uncooperative colleague when the manager has to use legitimate coercive power to make the person do the job.

The relationship is less important here, first because the person may be replaced if they do not perform as required. The lower maturity of the person also is assumed to lead to an attitude that does not respond well to a relationship-based approach.

#### Selling/coaching
Follower: unable but willing  
Leader: high task focus, high relationship focus

When the follower wants to do the job but lacks the skills or knowledge, the leader aims to encourage and motivate, while providing training opportunities to build up the necessary skills. Confidence building may need to go hand-in-hand with regular feedback on performance.

#### Supporting/challenging
Follower: able and unwilling  
Leader: low task focus, high relationship focus
When the follower can do the job, but is demotivated or needs support in moving on to a higher level of performance, the leader worries less about showing them what to do, and instead is concerned with finding out why the person is reluctant or demotivated and persuading them to cooperate. The style of persuasion will vary according to the response received. A clearly structured approach with targets and dates set to review progress may be required. Beware of apparent compliance disguising a refusal to change.

**Delegating**

Follower: able and willing  
Leader: 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, trusting them to get on with the job. Recognition and acknowledgement of their achievements are vital to maintain motivation. Delegated responsibilities can become broader in scope allowing more freedom to the individual or team.

**Appropriate leadership**

The key learning point here is that leadership should be appropriate.

1. An S4 style with D1 staff will be disastrous: too much delegation and freedom to immature staff who are not ready for it, or the laissez-faire manager who knows he has an unwilling and uncooperative member of staff but does not wish to address the problem. The staff member is enjoying autonomy without deserving it and is effectively taking the school or business for a ride.

2. Conversely mature, willing and successful teachers will resent and become demoralised by an inappropriate S1 style of leadership. They might cope with it to get out of special measures, appreciating the urgency of the situation, but it should not be a long term leadership style for such teachers. Many of the frustrations experienced by teachers under the National Curriculum were due to excessively directive leadership from central government permeating down through the system, which they felt to be an insult to their professionalism.

3. It is the leader who must adapt, not the follower. The leader should feel comfortable adopting whichever style is required in a given situation with each member of their team. It is not inconsistent to have different styles, nor should a leader claim that they have ‘their style’ and neglect the other styles when they are needed.

By adopting the right style to suit the follower’s development level, work gets done, relationships are built and, most importantly, the follower’s development level will rise, to everyone’s benefit.