

Situational Leadership Model - Hersey and Blanchard

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What is Situational Leadership?

Paul Hersey and **Ken Blanchard** first published their **Situational Leadership® Model** in their 1982 book, *Management of Organisational Behaviour: Utilizing Human Resources* .

The concept has become perhaps the best known of all the Situational/Contingency models.

The name Situational Leadership® has been extended variously by Hersey and Blanchard to related business services and products. Generally, when referring to the concept it is safer and correct to show the name as a registered protected trademark: Situational Leadership®.

Features of The Situational Leadership Model

The Situational Leadership® model is sophisticated. Its notable features are briefly that the model:

1. Focuses on **followers**, rather than wider workplace circumstances.
2. Asserts that leaders should **change their behaviour** according to the type of followers.
3. Proposes a '**continuum**' or progression of **leadership adaptation** in response to the development of followers.

These points are explained in greater detail below.

Situational Leadership® theory is commonly shown as classifying followers according to a **2x2 matrix**, using the highs and lows of two criteria, thereby giving four types of follower groups.

- **Note:** It is important to consider that **groups** and **individuals** may require different approaches when using Hersey and Blanchard's model.
- Notably, where members of a group possess **different levels of capability and experience**, Hersey and Blanchard's model requires a more **individualistic** approach, rather than a broad **group** approach.

Accordingly, this summary refers mainly to 'follower' or 'followers', rather than a 'group', in explaining how the model is best appreciated and used. The criteria of the followers are outlined below.

Followers

The term 'follower' may be interpreted to apply to an entire group for situations in which members possess similar levels of capability and experience:

- Competence
- Confidence and commitment

Alternatively:

- Ability
- Willingness

Logically the four group types are:

1. Low Competence/Low Confidence and commitment
2. Low Competence/High Confidence and commitment
3. High Competence/Low Confidence and commitment
4. High Competence/High Confidence and commitment

or more simply:

1. Unable and Unwilling
2. Unable but Willing
3. Able but Unwilling
4. Able and Willing

Extending the logic of this, Hersey and Blanchard further described and presented these four follower 'situations' as requiring relatively **high** or **low** leadership **emphasis** on the **Task** and the **Relationship**.

- For example, a **high task emphasis** equates to giving very clear guidance to followers as to aims and methods.
- A **low task emphasis** equates to giving followers freedom in deciding methods and perhaps even aims.
- A **high Relationship emphasis** equates to working closely and sensitively with followers.
- A **low Relationship emphasis** equates to detachment or remoteness, and either a trust in people's emotional robustness, or a disregard for emotional reactions. This 'low relationship' aspect is also called 'separated'.

High Task means followers have **Low Ability**. **Low Task** means followers have **High Ability**.

High Relationship means followers are **Willing**. **Low Relationship** means followers are **Unwilling**.

Note that 'Unwilling' may be because of a lack of confidence and/or because the aims/goals are not accepted. It is possible for a group of followers to be good at their jobs, but not committed to the aims/task.

The high/low Task/Relationship dimensions feature strongly in the diagrams and applications that Hersey and Blanchard developed around the Situational Leadership® theory.

The logic can be represented helpfully as a simple practical concise 'leadership styles guide', as below, including the continuum, by which the **leader changes styles in response to the growing/different maturity of followers.**

Interpretation of Hersey and Blanchard Basic Structure

Follower 'situation'	Leadership style emphasis	H & B terminology	Quick description	Continuum
Unable and Unwilling	high task - low relationship	Telling	instruction, direction, autocratic	M1
Unable but Willing	high task - high relationship	Selling	persuasion, encouragement, incentive	M2
Able but Unwilling	low task - high relationship	Participating	involvement, consultation, teamwork	M3
Able and Willing	low task - low relationship	Delegating	trust, empowerment, responsibility	M4

Given the name of the Situational Leadership® theory, it's useful to note that Hersey and Blanchard used the word 'situational' chiefly to suggest **adaptability**, more than the situation in which people operate.

- In fact, Situational Leadership® focuses firmly on **the follower(s)**, rather than the wider situation and workplace circumstances, and the model particularly asserts that a group's performance depends mostly on **how followers respond to the leader.**
- The model also proposes a '**continuum**' or progression of **leadership adaptation** in response to the typical development of followers. See the M1-M4 continuum on the grid above.

Hersey and Blanchard used the word 'maturity' in referring to the

continuum of follower development, requiring and enabling a leader to change leadership style through the stages outlined above.

- Here 'maturity' entails experience, skills, confidence, commitment, etc. - a combination of the two main 'follower' criteria, namely Ability and Willingness (Competence and Confidence/Commitment), which we can also interpret to be the follower's ability to self-manage or self-lead.
- Hersey and Blanchard clearly mapped a progression of changing leadership styles in response to the tendency for people's maturity to increase over time.

Comparison with Other Leadership Models

This aspect aligns somewhat with the Tannenbaum and Schmidt Continuum model, specifically limited to where both models can apply to **group maturity/capability development**.

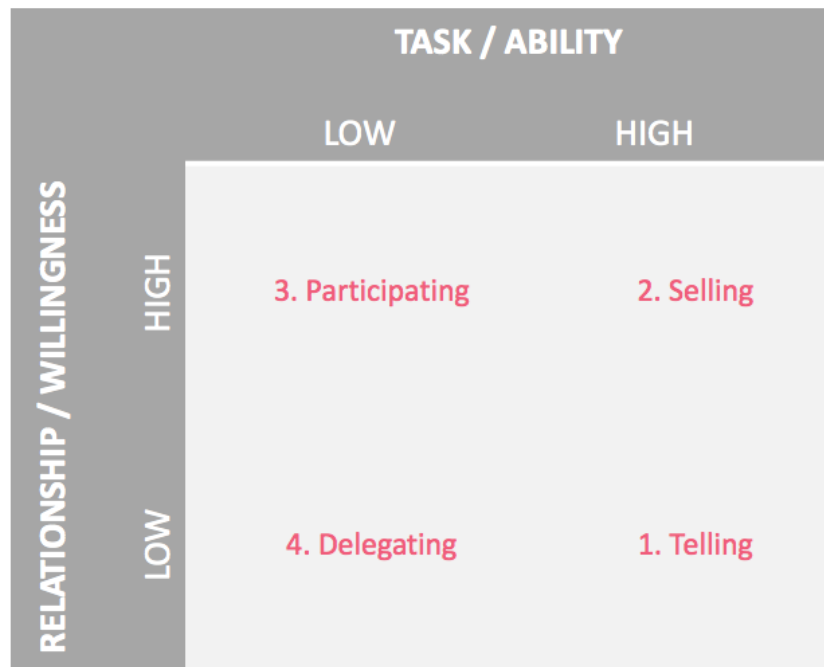
That is, under certain circumstances, a leader adapts his/her behaviour progressively, in response to followers' growing maturity/capability, usually over many months, potentially from the **inception or inheritance of a new team**, ultimately to when **the team can self-manage**, perhaps even (and some would say ideally) to be led by a new leader who has emerged from the team to succeed the departing leader.

Note: This is not to diminish the multi-faceted nature of the Tannenbaum and Schmidt and Situational Leadership® models, nor to overstate an overlap between them. Both models offer quite different frameworks for adapting leadership behaviour, based on more complex factors than simply the development of group maturity. Incidentally, from a group standpoint rather than a leadership angle, Bruce Tuckman's 'Forming-Storming-Norming-Performing' model is a very helpful separate reference concept for exploring and understanding group maturity development.

Hersey and Blanchard's 2x2 matrix, or four-square grid, has become a much referenced tool, and proprietary training method, for teaching and applying the Situational Leadership® model, notably matching the four leadership behaviours/styles to corresponding follower situations (or to 'entire group' situations, subject to the provisions already explained, that followers must possess similar levels of ability and experience as each other).

Hersey & Blanchard's Situational Leadership® Model diagram

(Adapted for presentation purposes)



Below is an outline of Hersey and Blanchard's matched sets of four follower types with four corresponding leadership styles, in order of the suggested continuum or progression coinciding with increasing follower maturity.

Followers and Leaders

Follower type	Leadership Style or Behaviour
1 Follower lacks experience or skill, and confidence to do the task, and may also lack willingness.	Telling - The leader gives precise firm instructions and deadlines and closely monitors progress.
2 Follower lacks the ability, perhaps due to lack of experience, but is enthusiastic for the work.	Selling - The leader explains goals, tasks, methods and reasons, and remains available to give support.
3 The follower is capable and experienced, but lacks confidence or commitment and may question the goal or task.	Participating - The leader works with follower(s), involved with the group, seeks input and encourages efforts.

4 The follower is capable, experienced, confident and committed to the goals.

Delegating - The leader gives responsibility to followers for setting goals, planning and execution.

Adaptive Leadership and Implications

The basic Situational Leadership® model can also be seen as a simple leadership process:

1. **Identify the category of follower(s).**
2. **Adapt leadership style/behaviour to match.**
3. **Continue to gauge follower status (notably ability and willingness) and adapt leadership behaviour accordingly.**

The Situational Leadership® model is widely taught and highly regarded.

- It is easier to apply for individual followers than for a group, notably where a group has mixed levels of abilities and willingness.
- The model also requires a leader to be capable of adapting or changing leadership behaviour, which not all leaders find easy, and some find impossible if the leader's own underlying beliefs cannot be modified.

Note: As indicated already, Situational Leadership® has been extended variously to related business services and products. Generally, when referring to the concept it is safer and correct to show the name as a registered protected trademark: Situational Leadership®. Use of material relating to Situational Leadership® and/or Situational Leadership II® - especially in commercial training - requires licence and agreement from the respective companies: Situational Leadership® is a trademark of the Centre for Leadership Studies, who represent the interests and products of Dr Paul Hersey. Ken Blanchard (incidentally, author of 'The One Minute Manager') went on to develop Situational Leadership II®, which now covers a range of products marketed by The Ken Blanchard Companies.

Acknowledgements

James Scouller Biography

We are grateful to James Scouller for his help, patience, and expert contribution in producing this leadership guide.

James Scouller is an expert coach and partner at The Scouller Partnership in the UK, which specialises in coaching leaders. He was chief executive of three international companies for eleven years before becoming a professional coach in 2004. He holds two postgraduate coaching qualifications and training in applied psychology at the Institute

of Psychosynthesis in London.

James Scouller's book is called "*The Three Levels of Leadership: How to Develop Your Leadership Presence, Know-how and Skill*" which was published in May 2011.

- You can learn more about James Scouller's book at three-levels-of-leadership.com.
- Details of James Scouller's executive coaching work are at TheScoullerPartnership.co.uk.

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