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**Leadership: A Mixed-Method Case Study to Explore the Behaviors a Consultancy Firm Managing Partner Uses to Create Meaning in Their Leadership—for Themselves and Their Followers—through Character, Relationships, Inspiration, Vision, and Wisdom**

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Leadership: A Mixed-Method Case Study to Explore the Behaviors a Consultancy Firm  
Managing Partner Uses to Create Meaning in Their Leadership—for Themselves and Their  
Followers—through Character, Relationships, Inspiration, Vision, and Wisdom

A Dissertation by

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April, 2017

Brandman University

Irvine, California

School of Education

Submitted in partial fulfillment of the requirements for the degree of

Doctor of Education in Organizational Leadership

Committee in charge:

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Finally, I acknowledge the memory of those I loved who are no longer with me. That they would be proud of my accomplishment—they gave me strength and a warm memory when I was weary.

## ABSTRACT

Leadership: A Mixed-Method Case Study to Explore the Behaviors a Consultancy Firm Managing Partner Uses to Create Meaning in Their Leadership—for Themselves and Their Followers—through Character, Relationships, Inspiration, Vision, and Wisdom

by Robert J. Mancuso

**Purpose:** The purpose of this mixed-method case study was to identify and describe the behaviors that exemplary consulting-firm Managing Partners use to create personal and organizational meaning for themselves and their followers through character, vision, relationships, wisdom and inspiration. In addition, it was the purpose of this study to determine the degree of importance which followers assign to the behaviors related to vision, character, relationships, wisdom and inspiration help to create personal and organizational meaning.

**Methodology:** This study is part of a thematic exploratory mixed-methods case study. Its focus is exemplar consulting-firm Managing Partners, and it is conducted in two concurrent parts: Part I—a qualitative in-depth interview with an exemplar consulting-firm Managing Partner; and Part II—a quantitative self-administered survey among thirteen followers of the Managing Partner interviewed in Part I.

**Findings:** The Managing Partner shows a reliance on vision, in general, and a shared vision, in particular, as the prominent domain in his leadership. Character comprises truth, trust, believability, and acceptance of consequences, but also calls for Emotional Intelligence.

Relationships focused on the pro-active behavior of soliciting input from followers, listening to them and thinking about the implications of their comments. His approach to inspiration was

two-dimensional—flexible and situation-centric *by which* he and his followers were inspired to act; and toward outcomes *to which* he inspired followers to achieve. Wisdom was couched in terms of its being gained from life-long experiences and not necessarily emanating from formal education. Followers concur that all five domains are all nearly equally important. Finally, the level of importance followers attach to leadership behaviors corresponded with the age of the follower.

Recommendations: Further research into the effects of multi-generational teams and the influence varying years of life experience may have on a leader's choice of meaning-making behaviors and strategies appears warranted. Finally, the exploration of additional domains not included herein may also bear fruitful intelligence; for example: spirituality, purpose, and politics.

## PREFACE

Following discussions and considerations regarding the opportunity to study meaning-making in multiple types of organizations, 4 faculty researchers and 12 doctoral students discovered a common interest in exploring the ways exemplary leaders create personal and organizational meaning. This resulted in a thematic study conducted by a research team of 12 doctoral students. This mixed-methods investigation was designed to focus on the ways in which exemplar consultancy-firm Managing Partners create personal and organizational meaning for themselves and their followers through character, vision, relationships, wisdom, and inspiration. Exemplary leaders were selected by the team from various public, for-profit and nonprofit organizations to examine the leadership behaviors these professionals used. Each researcher interviewed three highly successful professionals to determine what behaviors helped them to make meaning; the researcher then administered a survey to 12 followers of each leader to gain their perceptions about the leadership behaviors most important to creating meaning in their organization. To ensure thematic consistency, the team co-created the purpose statement, research questions, definitions, interview questions, survey, and study procedures.

Throughout the study, the term “peer researchers” is used to refer to the other researchers who conducted this thematic study. My fellow doctoral students and peer researchers studied exemplary leaders in the following fields: Barbara E. Bartels, presidents of private, nonprofit universities in Southern California; Kimberly Chastain, chief executive officers of charter-school organizations; Candice Flint, presidents or chief executive officers of nonprofits in California; Frances E. Hansell, superintendents of K-12 schools in Northern California; Stephanie A. Herrera, female chief executive officers of private-sector companies in California; Sandra



Hodge, chief executive officers of engineering technology organizations; Ed Jackson, exemplary technology leaders in Northern California; Robert J. Mancuso, a managing partners in a consulting firm; Zachary Mercier, professional athletic coaches in NCAA Division I institutions; Sherri L. Prosser, chief executive officers of healthcare organizations in California; Jamel Thompson, K-12 superintendents in Southern California; and Rose Nicole Villanueva, police chiefs in California and Utah.

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## CHAPTER I: INTRODUCTION

A 2013 Gallup Poll reported that 70% of American workers are apathetic about their jobs—either “not engaged” or “actively disengaged” in their jobs—and are “emotionally disconnected” from their workplaces, and “less likely to be productive,” according to the “*State of the American Workplace*” study (Clifton, 2013). Currently, the level of job apathy stands at 68% (Clifton, 2013). At the Gallup Organization, Ford (2013) reasoned that weak leadership might be the cause of this apathy and disengagement. More recently, Rangu Salgame (2015), Chief Executive Officer, Growth Ventures & Service Provider Group at Tata Communications, part of the \$100 billion global conglomerate Tata Group, claimed: “The fast pace at which globalization and technology innovations move today is not only disrupting traditional business models, but the traditional role of global business leaders as well” (para. 1). Leadership in general, and that of Managing Partners in particular, receives a disappointing report card from prominent consulting firms, business leaders, political leaders, and religious leaders (Camden, 2016; Follain & Nussbaum, 2015; Russell Reynolds Associates, 2016; Salgame, 2015). The global competitive economy and state-of-the-art of leadership appear at a crossroads in the 21<sup>st</sup> century. In the balance lie the future of which countries will lead and which will be subjugated.

No industry is exempt from the need to succeed. For example: the automotive industry has a multiplier effect in stimulating the economy, because the dollars generated get spent over and over in the community (Morison, 2014; Hill Maranger Menk, Cregger, & Schultz. 2015). Another prominent example is the \$230 billion consulting industry. Over the past five years, the management-consulting industry has been successful as

stronger corporate profitability and increasing business expenditures resulted in higher demand for advisory services (IBIS World, 2016). In the next decade, the consulting industry is expected to outpace most other industries in strong employment growth. The U.S. Department of Labor (DOL) notes that the professional and business services industry (which includes consulting firms) is the second-largest and second-fastest-growing occupational cluster in the service-providing industry, expected to add more than 1.8 million new jobs by 2024 (Vault Consulting Industry Outlook, 2016).

The research literature is replete with numerous philosophies on the external attributes, benefits and characteristics (ABCs) of leadership. These external ABCs of leadership are focused on achieving general goals and addressing specific industry-sensitive issues, while the internal ABCs of leadership focus on the leader's self-perception and extend outward to followers (Anderson, 2015; Crowley, 2011; George, Sims, McLean & Mayer, 2007; Kouzes & Posner, 2012; Lane-Schmitz, 2012; McCauley, Marian, Ruderman, & van Velsor, 2010). While these ABCs are necessary for leaders to master, some authors hint at something deeper — something that ties together the external and internal aspects of leadership (Barsh & Lavoie, 2014; Cook-Greuter, 2013; Henderson, 2011; Houston, 2014; Ko, 2011; Steger & Dik, 2010; and Ulrich & Ulrich, 2010). This something, when present, makes a good leader a great leader; makes a successful company an industry icon; enables employees, suppliers, and customers to find something extraordinary in everything associated with this leader and the meaning he or she imparts.

What enables attainment of meaningful leadership? In other words: to lead successfully, we need to create something internally deeper and more personally

powerful and empowering (Podolny et al., 2004). One unanswered question—with enormous economic implications—is: what do exemplary Managing Partners use to create something internally deeper and more personally and organizationally powerful?

### **Background**

Global leadership, leadership in the United States of America and leadership in the American workforce are at a crossroads as we progress through the early part of the 21<sup>st</sup> century. Stuart W. Holliday (Ambassador for Special Political Affairs at the United Nations, 2003-2005) argued in 2011 that fault lines have emerged over whether the right kind of American leadership is the unfettered and visible exercise of power or a more subtle orchestration of collective action and shared responsibilities when called for. No country or industry is exempt from the need to succeed (Camden, 2016; Follain & Nussbaum, 2015; Ford, 2013; Russell Reynolds Associates 2016; Salgame, 2015). The Reuters organization (2008) reports that a study by bankruptcy and restructuring professionals showed multiple industries suffered simultaneous downfalls in the U.S. during the Great Recession of 2008-09. Management/strategy consulting firms help to improve an organization's structure, management, efficiency, and profits, and plan strategies for short- and long-term development. Discovering the meaningful strategies used by consulting-firm Managing Partners may provide important answers to the future of leadership in America, and what this important industry can do to thrive.

### **Meaning-Making**

"There is no learning and personal development without reflection" (Pfeffer, 2010, p.49). Adams (2012) asserts that "... meaning-making is largely a subjective experience and unique to each individual" (p. 66). There are a broad set of sources of meaning in

work. "These range from the values, motivations, and beliefs that define the self to the role of spirituality in life—a variety of meaning sources have been identified in an effort to understand what employees draw upon in their experiences to compose work meaning" (Wrzesniewski, A., LoBuglio, N., Dutton, J. E., & Berg, J.M., 2013. p. 289). Among these values, motivations, and beliefs are: *character, relationships, inspiration, vision, and wisdom.*

Successful people are often heard to exclaim: "[they] are excited and passionate about their work and the opportunity to lead a fantastic group of people!" Did these individuals discover a profound meaning in what they are doing in order to make such an emphatic statement? Senge (2014) argues that the answer perhaps is yes: "when people connect with their deeper source of intention, they often find themselves experiencing amazingly synchronistic events" (p. 159). If you touch their heart, will you change their mind?

In the last century, the work of Barnard (1968), Selznick (1984) and Weber (1992) defined meaning as action that is internalized as having significance beyond mere technical efficiency—as being connected to vital aspects of one's life (Podolny et. al., 2004). According to these and other scholars, the capacity to develop close and enduring relationships is an important and vital responsibility of leaders. It is not enough to create strategy, structure and processes; those who do not go further will not be successful in the 21st century (George, et. al., 2007; Ricciardi, 2014). Leaders need to connect with constituents and be in touch with their inner selves on an intimate level—successful leaders can do this; unsuccessful leaders cannot (George et. al., 2007). Oddly, meaning per se defies measurement (Heifetz & Linsky, 2002).

## **Theoretical Framework**

Podolny et al. (2004) asserts that a leader cannot continue to infuse meaning over time unless the organization can survive, and since survival depends on some minimum level of performance, a focus on meaning cannot be maintained to the complete exclusion of a focus on performance. When leadership is conceptualized as meaning-making, the focus is on how the attributes and actions that would be categorized as agentic impact meaning, as well as the connection between meaning and performance. White, Harvey and Fox (2016) report that when successful leaders are examined, it might be discovered that these individuals mastered not just one, but a series of skills—ranging from managerial and character skills to vision and inspiration, and to relational skills, along with wisdom and political competencies. However, "political intelligence in itself [doesn't] compensate for a lack of vision, managerial ability, or tacky human relations skills ..." (White et al., 2016, p. 139). Does being excited, passionate, and successful about work enable one to find meaning in leadership? Or does discovering meaning in leadership enable one to be excited, passionate, and successful about work? Britt (2009) believes that successful leaders will be aware of the meaning they discover, as well as its root cause, because they understand its origins and are intuitively drawn to it, and it vibrates within them. The discovery of meaning in leadership begins with an understanding of leadership.

## **Leadership**

Leadership is dangerous (White et al., 2016; Heifetz and Linsky, 2002). To survive, it is first necessary to have power. Power is essential for effective leadership (White et al., 2016). Some power has its roots in politics (White et al., 2016; Pfeffer,

2010). And while having political intelligence may be a necessary requisite for successful leadership, there are other means to achieving power. In a lecture at Brandman University's January 2016 Immersion, Dr. Hightower presented five other sources that leaders can draw on to achieve power. Leaders draw power based on their expertise; based on their position; based on the way they treat others; they can coerce it with threats; or they can cultivate it with rewards (Hightower, 2016). This is reiterated by Maxwell (2013), who posits a similar set of principles:

(1) Position—people follow because they have to; (2) Permission—people follow because they want to; (3) Production—people follow because of what you have done for the organization; (4) People Development—people follow because of what you have done for them personally; and (5) Pinnacle—people follow because of who you are and what you represent (p. 6).

In maximizing power, it is important to keep in mind that power is not taken; it's given (Rose, 2011). For a leader to hold power and to expand power, it is imperative that the people within allow that power to be given (White et al., 2016; Heifetz & Linsky, 2002; Rose, 2011). At the center of leadership is a relationship—a connection without which one cannot draw power. Leaders constantly face the danger of being marginalized, diverted, attacked, or seduced (Heifetz & Linsky, 2002). However, it's not just leaders who face danger; followers face danger too. Leaders face the danger that power will be withdrawn or denied, and followers face the danger of unknown changes to their status quo.

Adaptive (transformational) change causes constituents to become anxious. It's not that people resist change; it's that they resist *being* changed (Senge, Scharmer, Jaworski, & Flowers, 2014). This adds to the complexity of balancing change with bestowed power. Could meaning-making be used to balance both sides of the power

equation? In exchange for the power to lead, do followers receive a deeper, more profound exchange that replaces the power they extolled (Heifetz & Linsky, 2002; Senge et al., 2014)? Allowing leaders to lead may be facilitated when followers understand the meaning behind the leader's motivation (Spain, 2014; Turnbull, 2013).

Leadership is more than gaining power—it about how that power is used. Thompson (2015) reports that ethical core values—humility, faith, and virtue—are critical in transforming 21<sup>st</sup>-century organizations. Developed through life's experiences, four key behaviors were discovered by Thompson (2015): "Key behaviors include: 1) Leading by example (modeling behavior); 2) A willingness to listen to others; 3) Establishing mission and vision; and 4) Building relationships" (p. ii). Lane-Schmitz (2012) reminds us that "The most common component found in effective leadership [is] vision. Having a vision and communicating that vision [is] found to be one of the most common components of effective leaders" (p. 68). The effects of vision have an impact on both leaders and followers—it is what the future will bring (Farrell, 2015; Kouzes & Posner, 2012). "Research suggests that leaders with a vision tend to be more successful ... Through a review of the literature, it was found vision is an important component of effective leaders" (Lane-Schmitz, 2012, p. v). An organization is created when vision is communicated, shared along clear lines of authority, and aligned with espoused and perceived values (Henderson, 2011). "In order to achieve [his/her] common goal, the leader needs to have a vision. Having and sharing a vision is an essential part of being an effective leader" (Northouse. 2009, p. 1).

While it may appear simplistic on the surface, developing a compelling vision and communicating it in a convincing manner that inspires and energizes followers is not an

easy task (Nanus, 1992). Nanus (1992) recommends leaders pay attention to how the vision is packaged prior to deciding on how best to tell their followers. Packaging the vision is a critical determinant of how it will be received and accepted. Transformational leaders motivate followers through a vision that is values-based, and takes into account the interests of the many rather than the interests of the few. The exemplary leader as change agent must consider how organizational culture might impact how the vision will capture attention, and instill a meaningful, compelling, and appealing message.

### **Followership**

Followership is a state of mind, not just a reporting relationship on an organizational chart. Followership connotes an attitude and behavioral construct—a dyad between leader and follower (Collinson, 2006; DeRue & Ashford, 2010). Within the dyad there are a number of power sources, as previously discussed—some stronger than others between leader and follower within the dyad. In other words, a leader's choice of power sources can affect followership. To reiterate power sources: Leaders draw power based on their expertise; based on their position; based on the way they treat others; they can coerce it with threats; or they can cultivate it with rewards (Hightower, 2016). Complicating followership is that leaders can choose to not lead (abdication), and followers can choose to not follow—thus depriving the leader of power (Warren, 2015; Washington, 2013). In oppositional contrast to those arguing a complex nature of followership, McCallum (2013) argues that followership is a straightforward concept—it's the ability to take direction, get behind a program, to be part of a team, and deliver what is expected. The truth seems to lie somewhere in between the two opposing sides. To hold the dyad together, both sides must understand what it is they are each trying to



achieve and how it will directly benefit each of them. The connective tissue in this anatomy is best described by Heifetz and Linsky (2002): "People find meaning [in life and in work] by connecting with others, in a way that makes [both] lives better" (p. 208).

The theoretical framework for the five domains of "meaning" explored in this research was first introduced by Dr. Keith Larick and Dr. Cindy Petersen in a series of conference presentations and lectures to school administrators in ACSA (Association of California School Administrators) and to doctoral students at Brandman University. This initial research and work by Dr. Larick and Dr. Petersen, coupled with their leadership experience as school district superintendents, inspired the need to explore what exemplary leaders do to develop personal and organizational meaning leading to high achievement. The five domains of leadership explored in this research include: *character, relationships, inspiration, vision, and wisdom*. The framework proposed by Larick and Petersen suggests that while each domain has merit, it is the interaction of the domains that support the making of meaning in organizations. In a 2015 Association of California School Administrators State Conference presentation, Larick and Petersen proposed that leaders with *character, relationships, inspiration, vision, and wisdom* have the integral skills to create personal and organizational meaning. In recent presentations at Brandman University, Larick and Petersen further assert that creation of personal and organizational meaning is fundamental to leading innovation and transformational change. The theoretical framework suggests that exemplary leaders who have developed behavioral skills in each domain have the capacity to create personal and organizational meaning for followers.

The 12 thematic studies are designed to explore the Larick and Petersen theory to determine whether exemplary leaders across a variety of professional fields have developed the leadership behaviors that fuse the five domains and actualized meaning in their organizations.

## **Character**

Character is a foundation upon which all other leadership characteristics depend—it is the root of trust (Reina & Reina, 2006, 2007). Character is a unique attribute in that its development may emanate from both externally acquired knowledge and the internally generated will to act upon it. Externally, Anderson (2015) suggests that in developing positive character traits, it is the motivation of both the follower and leader to end ethically. In acquiring positive character traits, leaders learn the importance of building trust and leaving an ethical and moral footprint (Riggio et al., 2010). Internally, wisdom and inspiration play a part in choosing to express the positive character qualities of trust and reliability. Scholars posit that leaders who exude these positive character traits have the potential to discover meaning within themselves (Bentley, 2014; Quick & Wright, 2011; Reina & Reina, 2007). Does having positive character intertwine with relationship-building, and does its presence reinforce the relationship or, if absent, undermine it? In answer to the question of how character impacts relationship-building, Reina & Reina (2007) argue that: "[You] are inclined to trust people who are self-aware; who take responsibility for their role in the relationship; who demonstrate that they consider the best interests of others rather than just themselves" (p. 39).

## **Relationships**

Leadership relies on building relationships (Reno, 2011), where the roles of leader and follower are understood and provided—i.e., both members of the dyad simultaneously accept the other as leader, and the other accepts the one as follower (DeRue & Ashford, 2010). Leadership requires strong positive relationships with self and others, and not necessarily in the “hard” business areas that are results-oriented (Houston, 2014). In other words: to lead successfully, we need to create something internally deeper and more personally meaningful. *Spirituality* may help leaders to discover meaning in their relationship in that it deepens the understanding of self and others (Anderton, 2012; Houston, 2014; Sexton, 2013). Additionally, communicating a sense of *purpose* may add to a sense of trust—a prerequisite for developing relationships. In building relationships, leaders benefit from communicating “*why*” they are asking us to follow (Barsh and Lavoie, 2014; Houston, 2014; Kurtzman, 2010; Sinek, 2015). Understanding the reason constituents are asked to follow and contribute may ignite a deeper, more focused meaning for both leader and follower and deepen their relationship with each other.

## **Inspiration**

“For many—from prophets and poets to athletes and activists—inspiration can be a powerful tool in motivating people to act morally, help other people, and become their best selves” (Smith, 2014, p. iii). It’s important to know when, why, [and how] individuals are actually inspired to action. Jack Welch inspired employees at General Electric to think big, thus enabling the company to become the world leader in multiple industries. What is it about a leader, an idea, or a possibility that inspires one to action?

Smith (2014) developed a general model of *being inspired to act*. At its core, the idea of being inspired to act implies that the notion be disruptive, relevant and attainable. Smith (2014) asserts that the intangibles within inspiration focus on being different from the way a person typically thinks relative to their core values, and resides within the realm of attainability. When these elements coalesce, will inspiration light up?

## **Vision**

Nothing of substance made by man begins without a vision. At the center of change is a strong, motivating and compelling vision. The most common component found in effective leadership was vision (Lane-Schmitz, 2012; Peterson, 2016). There are three main characteristics of vision that separate a manager from a leader, as detailed by Global Executive Leadership, including: sensing opportunities and threats in the environment, setting strategic direction, and inspiring constituents (Ibarra & Obodaru, 2009). What provides the needed balance, motivation, and support that sustain leaders? It's been suggested that leaders with a vision tend to be more successful when they discover a deep-seated meaning in that dream (Ulrich & Ulrich, 2010). Leaders who have a clear view of where they want to go and the ability to excite followers to believe in this place benefit from their vision and subsequently impact their followers (Henderson, 2011; Lane-Schmitz, 2012). Affecting the very heart of an organization—organizational DNA—is the ability to create meaning in and around the vision. Interrelatedly, inspiration and vision might also be affected by wisdom, as will be discussed next.

## **Wisdom**

Wisdom can be defined as an intellectual virtue that enables a person to make reliably good decisions about how to conduct oneself (Swartwood, 2013). Because wisdom is such an important and high-level achievement, readers might wonder: *what is the nature of wisdom?* Wisdom can be a particularly useful conduit through which meaning can be discovered—wisdom predicts behavior (Neil, 2014). Wisdom skills can strengthen the leadership construct through self-assessments and examination of core content areas. While the literature provides a model for understanding and developing intuitive wisdom in leadership, the Wisdom Model for Leaders—WML—stops short of the underlying construct of developing meaning (Livingston, 2012; Spano, 2013; Swartwood, 2013).

### **Statement of the Research Problem**

"During the past 50 years, organizational scholarship on leadership has shifted from a focus on the significance of leadership for meaning-making to the significance of leadership for economic performance" (Podolny et al., 2004, p. 1). Warning against an economic-only strategy, Lencioni (2012) asserts that successful companies are those that are both smart *and* healthy. Focusing on business strategy, marketing, finance, and technology is necessary, but it hasn't yielded the competitive advantages for which companies are hoping. Lencioni says: "I've become absolutely convinced that the seminal difference between successful companies and mediocre or unsuccessful ones has little, if anything, to do with what they know or how smart they are; it has everything to do with how healthy they are" (p.8). He defines healthy organizations as those with minimal politics and confusion, cultivating high degrees of morale and productivity, and

with the absence of high turnover among good employees. This is in stark contrast to a 2013 Gallup Poll that reported 7 out of 10 American workers were disengaged, emotionally disconnected, and technologically disrupted from their workplace—a possible sign of weak leadership, according to many experts (Clifton, 2013; Ford, 2013; Gallop, 2013; Salgame, 2015). This disconnect is echoed today by prominent consulting firms, business leaders, political leaders, and religious leaders (Camden, 2016; Follain & Nussbaum, 2015; Russell Reynolds Associates, 2015; Salgame, 2015). In order to achieve economic goals, experts say it is necessary to engage workers.

For example, a 2015 study conducted by Russell Reynolds Associates among 210 executives at the world’s top OEM brands and Tier 1 companies found that the most pressing issue among automotive industry board members and CEOs is their concern about indentifying the next generation of leaders—and by extension, consulting firm Managing Partners play a pivotal role in their future success. This was echoed (in 2015) by the worldwide consulting firm, Deloitte, which called leadership the "perennial issue" that never seems to go away. In 2017, they point toward a radical shift—as never before, “organizations do not just need more strong leaders, they need a completely different kind of leader—younger, more agile, and ‘digital-ready’” (Deloitte Global Human Capital Trends, 2017)

With leadership at the forefront, illuminating the underlying strategies in producing healthy organizations among current Managing Partners may make it possible to emulate their success with the next generation of leaders. The gap in the research literature is what creates *meaning* in a particular field, such as the consultancy industry. What may account for this industry's remarkable recovery and transformation?

Exemplary consulting-firm Managing Partners may be a conduit through which it may be possible to discover what meaning is and what strategies these meaning-makers used to find it.

Experts say that leaders who focus on making meaning may be able to reconnect their followers to the organization's needs. Lencioni (2012, p. 82) states it simply by asking leaders to answer the question: "Why do we exist?" Meaning-making is further underscored by Lencioni (2012), who goes on to emphasize that "employees in every organization and at every level need to know that the heart of what they do lies in something grand and aspirational" (p. 82). Rosso, Dekas, and Wrzesniewski (2010) assert that a variety of factors influence perceptions of meaning and meaningfulness: "...from individual attitudes to organizational values to spiritual connections and beyond—these different factors are potential sources of meaningfulness in work" (p. 95). Among the areas that appear to be relevant to making meaning are five practices used by leaders of successful organizations: *Character* (Bentley, 2014; Quick & Wright, 2011; Spain, 2014); *Inspiration* (Ko, 2011; Ricciardi, 2014; Smith, 2014); *Relationships* (Henderson, 2011; Holland, 2015; Lewis, 2011); *Vision* (Heil, Bennis & Stephens, 2000; Lane-Schmitz, 2012; Qin, 2014); and *Wisdom* (Neil, 2014; Pfeffer, 2010; Swartwood, 2013). It is widely recognized that these practices contribute to optimizing leadership. However, more information is needed to determine their impact on making meaning in an organization by creating "a work setting in which individuals coordinate their aspiration and actions to create meaning for themselves, value for stakeholders, and hope for humanity at large" (Ulrich & Ulrich, 2010, p. 4).

While much is already known about these elements individually, more research is needed to determine how current Managing Partners describe these practices as important to meaning-making for themselves and their followers. Of equal importance is the need to discover how followers perceive these strategies as important in making meaning in their work for themselves and their followers.

### **Purpose Statement**

The purpose of this mixed-method case study was to identify and describe the behaviors that an exemplary consulting-firm Managing Partner uses to create personal and organizational meaning for themselves and their followers through character, vision, relationships, wisdom and inspiration.

In addition, it was the purpose of this study to determine the degree of importance followers assign to the behaviors related to character, vision, relationships, wisdom and inspiration help to create personal and organizational meaning.

### **Research Questions**

Two research questions were answered by this study: (1) what are the behaviors that an exemplary consulting-firm Managing Partner uses to create personal and organizational meaning for themselves and their followers through character, vision, relationships, wisdom and inspiration? (2) To what degree do followers perceive that the behaviors related to character, vision, relationships, wisdom and inspiration help to create personal and organizational meaning?



## Significance of the Study

During the last half-century, scholars writing on organizational leadership have shifted from a focus on the significance of meaning-making in leadership to the significance of leadership for bottom-line economic performance (Podolny et al., 2004). At a time when American leadership is being questioned here and around the world, a three-year bipartisan commission headed by Kyl and Lieberman (2015) for the American Enterprise Institute Policy for Public Research, found that "the global architecture the United States conceived, built, and maintained since World War II is in jeopardy" (p. 1). Added to these findings is John Allison's article in *Forbes Magazine* on November 20, 2014, which said:

One of the underlying causes of the Great Recession and its abnormally slow recovery is a failure of leadership. We have a leadership crisis at the individual, organizational and societal level that has exacerbated our economic problems and handicapped the fundamental motivating principle at the heart of our country (para. 1).

It is imperative that leadership in America be successful. At stake is the economic foundation upon which our democracy is built. *The Policy Playbook*, issued at the 13<sup>th</sup> Annual Leadership Summit in Oregon, promotes the notion that when business leaders succeed, jobs are created, incomes rise, opportunities increase, and people flourish (Wasson, 2015).

The framework upon which this study is based rests on the interrelationship of *character, relationships, inspiration, vision* and *wisdom*. The findings from this study may be transferable to leadership in government, business, education, and other industrial

organizations. The behaviors used to discover meaning-making in this study are transferable to other industries and companies based on their origins in universal human nature, and in their ability to inspire leaders to look for meaning in their own companies.

### **Definitions**

Following are definitions of terms relevant to the study. For alignment and clarity the definitions are presented below with the theoretical definition followed by the operational definition.

#### **Exemplary**

**Theoretical Definition.** Someone set apart from peers in a supreme manner; suitable behavior, principles, or intentions that can be copied (Goodwin, Piazza, & Rozin, 2014)

**Operational Definition.** Exemplary leaders are defined as those leaders who are set apart from peers by exhibiting at least five of the following six characteristics: (1) Evidence of successful relationships with followers, (2) Evidence of leading a successful organization, (3) A minimum of five years of experience in the profession, (4) Articles, papers, or materials written, published, or presented at conferences or association meetings, (5) Recognition by their peers, and (6) Membership in professional associations in their field.

#### **Followership**

**Theoretical Definition.** Followership is the role held by certain individuals in an organization, team, or group. Specifically, it is the capacity of an individual to actively follow a leader. Followership is the reciprocal social process of leadership. Specifically,

followers play an active role in organization, group, and team successes and failures. (Baker, S. D. (2007); Riggio, R. E., Chaleff I., & Blumen-Lipman, J. (2008).

**Operational Definition.** For purposes of this study a follower is defined as a member of the leadership team who has responsibilities for managing different aspects of the organization. This group of followers could include: Chief Information Officer, Assistant Superintendents, Director, Coordinator, Chief Financial Officer, Director of Personnel Services, Coordinators, Administrators, Sales Managers, Account Managers, Principals, etc.

### **Meaning**

**Theoretical Definition.** Meaning is a sense of purpose as a fundamental need, which leads to significance and value for self and others (Bennis, 1999; Csikszentmihalyi, 1990; Frankl, 1984; Kouzes & Posner, 2006, 2007; Pearson, 2015; Socrates, 469BC; Tredennick, 2004; Varney, 2009; Yeoman, 2014).

**Operational Definition.** Meaning is the result of leaders and followers coming together for the purpose of gathering information from experience and integrating it into a process that creates significance, value and identity within themselves and the organization.

### **Character**

**Theoretical Definition.** Character is the moral compass by which a person lives their life (Bass & Bass, 2008; Bass & Steidlmeier, 1999; T. Moore, 2008; Quick & Wright, 2011; Sankar, 2003)

**Operational Definition.** Character is alignment of a value system that promotes ethical thoughts and actions based on principles of concern for others through optimism and integrity while being reliable, transparent, and authentic.

## **Relationships**

**Theoretical Definition.** Relationships are the bonds that are established between people through encouragement, compassion, and open communication, which lead to feelings of respect, trust and acceptance (Bermack, 2014; Frankl, 1984; George, 2003; George & Sims, 2007; Henderson, 2011; Kouzes & Posner, 2006, 2007, 2009; Liborius, 2014; Mautz, 2015; McKee, Boyatzis, & Johnston, 2008; Reina & Reina, 2006; Seligman, 2002; D. M. Smith, 2011; Ulrich & Ulrich, 2010).

**Operational Definition.** Relationships are authentic connections between leaders and followers involved in a common purpose through listening, respect, trust, and acknowledgment of one another.

## **Inspiration**

**Theoretical Definition.** Inspiration is a source of contagious motivation that resonates from the heart, transcending the ordinary and driving leaders and their followers forward with confidence (Kouzes & Posner, 2007; I. H. Smith, 2015; Thrash & Elliot, 2003).

**Operational Definition.** Inspiration is the heartfelt passion and energy that leaders exude through possibility-thinking, enthusiasm, encouragement, and hope to create relevant, meaningful connections that empower.

## **Vision**

**Theoretical Definition.** A bridge from the present to the future created by a collaborative mindset, adding meaning to the organization, sustaining higher levels of motivation and withstanding challenges (Kouzes & Posner, 2006, 2007; Landsberg, 2003; Mendez-Morse, 1993; Nanus, 1992).

**Operational Definition.** Vision is foresight demonstrated by a compelling outlook on the future, shared by leaders and followers who are engaged to create the future state.

## **Wisdom**

**Theoretical Definition.** Wisdom is the ability to utilize cognitive, affective, and reflective intelligences to discern unpredictable and unprecedented situations with beneficial action (Baltes & Staudinger, 2000; Kekes, 1983; Pfeffer, 2010; Spano, 2013; R.J. Sternberg, 1998).

**Operational Definition.** Wisdom is the reflective integration of values, experience, knowledge, and concern for others to accurately interpret and respond to complex, ambiguous, and often unclear situations.

## **Delimitations**

This study was delimited to one exemplary consulting firm Managing Partner and 13 followers. To be considered as an exemplary leader, the leader must display or demonstrate the following: (1) evidence of successful relationships with stakeholders; (2) evidence of leadership behaviors promoting a positive and productive organizational culture; (3) five or more years of experience in that profession or field; (5) materials written, published, or presented at conferences or association meetings; (6)

recognition by peers as a successful leader; and (7) membership in associations of groups focused on their field.

### **Organization of the Study**

Four additional chapters—II through V—comprise the remainder of the study. Chapter II is a detailed review of the scholarly literature. In this chapter, major theories and leadership constructs are examined with a focus on how they contribute to meaning-making, leadership, and followership, as well as an in-depth review of Larick and Petersen's five identified variables associated with meaning-making. These five variables are: *Character, Relationships, Inspiration, Vision, and Wisdom*. Chapter III follows with a restatement of the purpose of the study and research questions. This chapter describes the mixed methods by which the data was collected and analyzed. Also provided are the limitations of the study. Shown in Chapter IV are the findings of the study. Key findings—based on an analysis of the data—illuminate the research questions established at the outset. Chapter V concludes this comprehensive study with a report of key findings, conclusions, implications for practice, and recommendations for research that other scholars may want to pursue in the future.

## CHAPTER II: REVIEW OF THE LITERATURE

### Introduction

Lynne Doughtie (2016), Chairman and CEO of one of the fastest growing Big 4 U. S. accounting firms—KPMG U.S.—states in their U.S. *CEO Outlook 2016—Now or Never* report: "Today's top business leaders understand that long-term success in this era of fast-paced technological change and global economic shifts requires a new way of thinking and operating. In fact, the corporate playbook is being rewritten and replaced by one that takes business agility to a level we have never seen before" (p. 2). According to the 2013 "*State of the American Workplace*" study (Clifton, 2013), American workers are either not engaged or are actively disengaged in their jobs. At the Gallup Organization, Ford (2013) reasons that weak leadership might be the cause of this disengagement. Leadership in general and consulting-firm Managing Partners in particular receive a disappointing report card from prominent consulting firms, business leaders, political leaders, and religious leaders (Camden, 2016; Follain & Nussbaum, 2015; Russell Reynolds Associates, 2016; Salgame, 2016).

The global competitive economy and the state-of-the art of leadership appear at a crossroads in the 21<sup>st</sup> century. While some organizations are able to navigate the waters of change, others are not so able (Lencioni, 2012). This study focuses on the discovery of meaning in leadership to determine: (1) what behaviors an exemplary consulting-firm Managing Partner uses to create personal and organizational meaning for themselves and their followers; and (2) to what degree followers perceive these behaviors as related to personal and organizational meaning.

The literature review in this dissertation and the research questions covers five influential antecedents that might impact meaning: *character, relationships, inspiration, vision* and *wisdom*.

### **Meaning/Creating Meaning**

Deep within our life's work, the foundation of meaning is laid. All work contributes to our inner reflections, contributes to our ability to affect our destiny, and enables the discovery and communication of meaning (Moore, 2008). Adams (2012) underscores meaning as “largely a subjective experience and unique to each individual” (p. 66). There is a significant relationship between transformational leadership and work engagement, which is made possible by meaning-making (Gutierrez, 2014).

Connectivity with each other in today's society, and at work through technology, is a common occurrence—as is our ability to know ourselves. Work is an avenue for self-expression and self knowledge (Bentley, 2014; Maslow 1943, 1954; McLeod, 2014).

Meaning is a theoretical sense of purpose as a fundamental need that leads to significance and value for oneself and others. (Aristotle, 384BC, as cited in Barnes, 2004; Bennis, 1989; Csikszentmihalyi, 1990; Frankl, 2006; Kouzes & Posner, 2006, 2012, & 2016; Mautz, 2015; Moore, 2008; Pearson, 2015; Socrates, 469 BC; Varney, 2009; Yeoman, 2014). Operationally, meaning is the result of leaders and followers coming together for the purpose of gathering information from experience and integrating it into a process that creates significance, value and identity within themselves and the organization.



## Theories of Meaning

This section examines three theories about meaning. Theories about meaning include: meaning's subjectivity and its elusive measurement; its ability to promote well-being and a sense of happiness; and its ability to transcend and transform the lives of followers and leader alike. The following paragraphs focus on some of the major theories that form the foundation for meaning.

**Meaning is a subjective and elusive entity.** "Meaning is in the eye of the beholder", according to Dik et al. (2013, p. 153). This theoretical principle of subjectivity and elusiveness stems from the works of several authors. Fostering meaning at work is vital to personal significance and making work matter (Mautz, 2015). Adams (2012) underscores Mautz's premise in stating that "... meaning-making is largely a subjective experience and unique to each individual" (p. 66).

Dik et al. (2013) impose a subjective parameter around meaning by contrasting it with purpose. They say the difference between meaning and purpose is rooted in their contexts—*meaning* stems from significance, importance, and value; *purpose* stems from intentions, objectives, and goals. Intentions, objectives and goals can be measured in terms that are more or less concrete. However, meaning's significance, importance and value each have a personal subjectivity—what is significant to one person may not hold any significance to another. When considering how subjective meaning can be, we are confronted with its elusiveness, which cannot be quantified. It's widely recognized, for example, that a family heirloom—no matter how small or inconsequential it may appear—carries enormous meaning through the memories it represents. That which one individual may consider precious, another may fail to appreciate.

Adding to the complexity of meaning is that "Meaning can not be measured" (Heifetz & Linsky, 2002, p. 212). Ten years later, Steger et al. (2012) corroborated this conclusion when they reported there is an "absence of measures of meaningful work that are theory-based and psychometrically sound" (p. 152). Research efforts by Steger and Dik and their colleagues contributed to important breakthroughs in the study of meaning-making. A phenomenological observation of meaning reveals that the way something is interpreted and understood is not specifically work-related, but rather a function of the individuals who view it (Dik et al., 2013; Steger et al., 2012).

**Profound meaning promotes happiness and wellbeing.** Meaning can be a positive motivator in achieving greater levels of happiness. This theoretical principle follows the reasoning that when individuals are able to extract a deep-seated meaning in their lives and in their work, life takes on a more tranquil environment as a result of knowing why one is so motivated. Meaning and well-being theory are linked by Seligman (2011) in his reexamination of happiness—meaning is shown as one of the key elements in his theory, which also includes positive emotions, engagements, relationships, and achievements.

**Meaning transcends the work environment and permeates our lives.** This theoretical principle is rooted in the concept posited by Ulrich & Ulrich (2010), who define *abundant organizations*—having more than enough of the things that matter—as a work environment that extols individuals' aspirations and actions in a way that creates meaning for each other, stakeholders, and the communities they affect. "Great Leaders", according to Ulrich & Ulrich (2010), "recognize the vital importance of abundance and meaning to everyone in their organization. Including themselves" (p. 7). Meaning in

work and meaning in life are synonymous, according to Ulrich & Ulrich (2010). Kouzes & Posner (2014) make the case—for more than 25 years—that leadership is about mobilizing others to achieve extraordinary accomplishments in organizations. "We need leaders who can unite us and ignite us" extols Kouzes & Posner (2016, p. 7).

"Meaning is premised on an entirely different way of interacting—that is, giving to others in service of the 'greater good'" (Amortegui, 2014, para. 8). Achieving this new 21<sup>st</sup>-century management approach requires that followers experience the true flavor of the meaning that resides in the heart of the leader (Crowley, 2011). Knowing *why* constituents are asked to follow underscores the importance of meaning-making to them (Sinek, 2009, 2011, 2014, 2015).

### **Importance of Meaning**

There exist a number of sources that employees utilize in their experiences to compose work meaning (Wrzesniewski, LoBuglio, Dutton, and Berg, 2013, p. 289). "Surviving is not enough ... the point is to make life meaningful while [we] can—much depends on the talent, opportunities, and experiences that come our way—people find meaning by connecting with others in a way that makes life better" (Heifetz & Linsky, 2002, p.208). A practical-use translation of Dik et al. (2013) is encapsulated by Ghadi, Fernando and Caputi (2013) in their *Leadership & Organization Development Journal* article—"Transformational leadership and work engagement: The mediating effect of meaning in work"—in which they focus on Maslow's hierarchy of needs (1943; 1954). In their article, Ghadi, Fernando, and Caputi (2013) point out that transformational leadership *style* has a strong influence on followers' engagement in work—where a direct relationship among leaders' style was found to mediate followers' perception of meaning

in work. More importantly, unengaged employees are costing billions of dollars in productivity. Their Structural Equation Model could help reduce these losses and provide insights into new training programs for transformational leadership in the workplace.

McLeod (2014) continues the conversation about meaning in speaking about individuals' rise in the pyramid described in Maslow's *Hierarchy of Needs* (1943, 1954). People, especially those who follow leaders, need to feel a sense of belongingness, esteem, and self-actualization within the organization—"basic human needs are organized into a hierarchy of relative prepotency" (Maslow, 1943, p. 375). Maslow (1943) explains that survival is only the beginning of man's quest for meaning.

Once the lower survival needs, which involve psychological, safety and social needs, are met, individuals seek to address their higher-order needs—which involve progressing from “belonging” to “esteem” to “self-actualization”.

Experiencing personal meaning in work has been shown to relate closely to satisfying these higher-order needs (p. 533).

Meaning contributes to these hierarchical needs (Heifetz, 2008). Meaning enables workers to ascend the hierarchy toward self-actualization. In quoting Phil Jackson, Heifetz (2002) states: "The most effective way to forge a winning team is to call on the players' need to connect with something larger than themselves" (p. 209).

**Meaning—The essence of existence.** Human existence demands that life hold meaning for each individual. It is a fundamental aspect of life; it gives each person a purpose (Collins, 2011; Mautz, 2015; Nanus, 1992; Pearson, 2015; Rath, 2015; Seligman, 2011). Ulrich & Ulrich (2010) point out that meaning is not found in the event, but rather

in the people who attend the event. Just prior to World War II, Viktor Frankl—a psychologist—developed a system of psychotherapy based on our need for meaning. His position on meaning is presented in his re-edited books *Man's Search for Meaning* (1959—2006). Frankl reminds us that we have to work at meaning-making—at work, in organizations or on a personal level. "Leaders have the primary responsibility for this meaning-making process" (Ulrich & Ulrich, 2010, p. 31). It is through belonging that we develop a sense of value, identity, and meaning (Mautz, 2015; Nanus, 1992; Seligman, 2011).

Spirituality and purpose deepens meaning: "Spirituality is accessing a universal understanding that life can be greatly enhanced in all relationships by developing our inner wholeness and other connectedness" (Houston, 2014, p. 132). That particular aspect of meaning in leadership may well have its roots in the concepts of passion and love that support relationship development (Lewis, 2011). In this regard, several questions are raised that exemplify the notion that meaning defies measurement (Heifetz & Linsky, 2002). For example: How do you measure the strength of one relationship in comparison with another? "Research shows that love and relationship satisfaction are difficult to scientifically define and characterize" (Lewis, 2011, p.147). Lewis states: "During the Renaissance Period known for its quests to replace Christian salvation with viable, secular images of human fulfillment, focus was placed on work, especially creative art, and inner passion, especially love" (Baumeister, 1987, p. 167; Baumeister, R. F., & Leary, M. R. (1995).

## **Love, Optimism, and Hope**

Crowley illustrates in his 2011 book *Lead from the Heart* that a new 21<sup>st</sup>-century leadership model—one that places emphasis on making people feel appreciated and needed—has to replace the archaic approach that ignores people's desire for self-actualization and personal esteem as cited in Maslow (1943). The Crowley model is based on four practices resulting in meaning-making: hire engaged workers; connect more personally with them; maximize employee potential; and recognize great work. The resultant output is lower turnover, happier employees, and better financials. Work can be more than a job; it can also contribute to feelings of family, promote happiness and self-esteem, and be a source of recognition, posits Seligman (2006).

Collins (2011) contributes to the idea that meaning-making requires going beyond the good that is exemplified in the status quo. He summarizes his thoughts with the adage that "*good can be the enemy of great*" in that it can stifle our desire for more. Crowley's leadership model is a force that can propel us further in a quest for greater meaning. "Good" keeps us satisfied with the status quo," and is exemplified by another adage: *If it isn't broke, don't fix it*. "Most companies have to work hard to get to good. Only some will ever achieve greatness" says Collins (2011, p. 4).

## **Adversity and Challenges**

It is widely accepted that humans have an inherent genetic desire for happiness. According to Csikszentmihalyi & Hunter (2003), what adds to happiness creates a positive attraction; what delivers unhappiness delivers pessimistic feelings. Adversity and life's challenges can get in the way of achieving happiness. Sources of adversity and the challenges faced by people include work-related situations. What people do for a

living and with whom they do it impacts the level of happiness they experience. Freely chosen activities and the company of peers raise the level of measured happiness, while obligatory activities lower the measured levels of happiness. Meaning-making enables people to draw nearer to optimistic principles. (Csikszentmihalyi & Hunter, 2003).

### **Meaning and Leadership**

Exemplary leaders grasp the internal and external concepts of self and others. Awareness of self and the needs of others enables leaders to connect and convince followers of the merits of their visionary cause (Nanus, 1992; Sinek, 2009; Ulrich & Woodson, 2011). Exercising leadership is a two-way engagement where meaning is created for leaders and followers alike (Heifetz & Linsky, 2002). Why do some well-educated and supposedly brilliant people struggle, while others with fewer obvious attributes flourish? The answer may well be their level of emotional intelligence. EQ measures the ability of an individual to manage their emotions. Self-introspection is a key factor in gaining stronger EQ scores (Bradberry & Greaves, 2009). Exemplary leaders need to determine what their followers personally value and what their motivations entail (Dik et al., 2013).

In their book *A Leader's Legacy*, Kouzes and Posner (2012) remind us that while many leaders have a desire to leave behind a legacy, "legacy thinking means dedicating ourselves to *making a difference*, not just working to achieve fame and fortune" (p. 5). Mautz (2015) explained that legacy and purpose are supportive of each other; yet unique in the way they unlock meaning, performance excellence, and fulfillment. Mautz (2015) points out that purpose is why we exist, and why we are working. Mautz expands this further: legacy is what we did in achieving our purpose while we were working. Purpose

provides direction; legacy guides activities along the way. Finally, sustainability is a hallmark of a transformational leader's legacy. "A leader's legacy is only as strong as the foundation they leave behind that allows others to continue to advance the organization in their name" (Sinek, 2014, p. 169).

When followers understand the purpose of what they do, and the far-reaching effects it can produce, and when leaders infuse their followers with a deep sense of self-fulfillment, organizations are in a position to flourish (Mautz, 2015; Kouzes & Posner, 2006; Ulrich & Ulrich 2010). It is not enough to create strategy, structure and processes—those who do not go further will not be successful in the 21st century (George et. al., 2007; Ricciardi, 2014). Creating a sense of urgency along with a shared vision promotes organizational meaning. To underscore organizational meaning, Ulrich and Ulrich (2010) insist that creating structure in an unstructured environment, and rethinking purpose and the strategies employed in self-knowledge and immediacy, all pave the way toward organizational meaning and urgency (Crowley, 2011; Ulrich & Ulrich, 2010; Zenger& Folkman, 2009).

### **Leadership**

Since 1982, Kouzes and Posner (2012) developed the *Five Practices of Exemplary Leadership* in their quest to discover the elements that make up exemplar leaders. In their 2012 book *The Leadership Challenge*, they detail how they examined "men and women, young and old, representing just about every type of organization there is, in all functions, from many different places around the world" (p. 2). This comprehensive approach makes their findings especially relevant to the discovery of leadership in this study. Kouzes and Posner (2012) report that exemplary leaders set an



example, inspire a shared vision, experiment and take risks, enable followers to act in unison, and celebrate the values of victories. "Leadership is personal. Unless *you* know who you are, what you are prepared to do and why", then you can't do anything very grand (in Kouzes & Posner, 2006a, p. 51). Applying the leadership theory to change-making evolves into transformational theory.

### **Transformational Leadership Theory**

In order to understand transformational theory, it is first necessary to speak of the challenges required of leaders. Ackerman and Anderson (2010) cite three central premises in this regard: (1) engage in their own personal transformation; (2) engage stakeholders early in the change process; (3) manage the change process overtly and responsibly with regard to course corrections as needed. Adding to this perspective, transformational leadership theory also emphasizes morality, along with integrity, trust and ethical behavior (Cisek, 2009; Northouse, 2009).

Some prominent scholars point to empowerment as a central element in transformational change; others focus on servitude; while still other researchers consider interactions between the leader and the situation facing the leader as variables in transformational or charismatic theory (Bass & Bass, 2008; Bennis, 1989; Kouzes & Posner, 1989).

Citing Adam Kahane, Senge et al. (2014) point to the superficiality of most change efforts as not generating the deep understanding and commitment that is necessary for sustained change under the demanding circumstances facing today's leaders. Years earlier, Gardner (2008) offered a remedy for superficiality in his book *5 Minds for the Future*, in which he recommends that transformational leaders need to

create a compelling narrative about the organization's polity. To produce depth and commitment, leaders need the powers of persuasion and personal example to change thoughts and feelings and behaviors of followers. "Only the rare leader—the transformative or visionary leader—displays genuine creativity" (Gardner, 2008, p. 100).

Adding to the complexity of transformational leadership is the myth that constant pressure enables great leaders to thrive. "Resonant leaders need to regularly monitor themselves, to see if they might be slipping toward the *Sacrifice Syndrome*—a vicious cycle of stress and sacrifice resulting in mental and physical distress, burnout, and diminished effectiveness" (McKee et al. 2008, p. 37-57).

Leadership power is expressed in other ways, e.g., in the form of servitude. Sinek (2014) describes servant leadership from the perspective of the benefit given to followers. The more a leader enables the group to succeed, the more valuable the leader is to the group and the more respect is garnered. Going further, the more respect and recognition the group gives to the leader, the higher the leader's status will become, the more power is given, and the more the leader will be incented to continue the process.

Having a successful relationship with oneself is a prerequisite to having successful relationships with others, pointing toward the leader's need for inner self-actualization—transitional change—prior to embarking on external transformational change. Otto Scharmer, in his *Theory of U*, describes three stages that enable individuals to experience internal and external change: *Sensing*—"observe, become one with the world"; *Presencing*—"retreat and reflect, allow inner knowledge to emerge"; and *Realizing*—"acting swiftly, with a natural flow" (Senge et al., 2014, p. 88).

Change, especially transformational change, begins with an exploration and diagnosis of the self. For change to occur, it has to be desired at a very deep and profound level of personal meaning (McKee et al., 2008). Adam Kahane (1990) worked with Joseph Jaworski to facilitate the process of ending apartheid started by President de Klerk in South Africa. He said, "Most change processes are superficial because they don't generate the depth of understanding and commitment that is required for sustaining change in truly demanding circumstances" (Senge et al., 2014, p. 87).

Finally, transformational leadership would not be complete without a discourse on the virtues and pitfalls of power. Pfeffer (2010) emphasizes the need for leaders to gain power in order to effectively execute their role. Gaining and keeping power is an essential element of transformational leadership. "We choose how we will act and talk, [sic] and those decisions are consequential for acquiring and holding on to power." (Pfeffer, 2010, p. 128). Leaders must be given power; they cannot simply take it (Pfeffer 2010). "[Followers] grant you power because they expect you to provide them with [something of value]" (Heifetz & Linsky, 2002, p. 168).

### **Followership**

Followership connotes an attitude and behavioral construct—a dyad between leader and follower (Collinson, 2006; DeRue & Ashford, 2010). Complicating followership is that leaders can choose to not lead (abdication), and followers can choose to not follow—thus depriving the leader of power (Heifetz & Linsky, 2002; Warren, 2015; Washington, 2013). In contrast, McCallum (2013) argues that followers should simply get behind a program, to be part of a team, and deliver what is expected. The truth seems to lie somewhere in between the two opposing sides. "Followers in any

situation are vital, not only because individually they accept or reject the leader, but because as a group they actually determine whatever personal power that leader will have" (Hersey, Blanchard & Johnson, 2001, p. 148). This is especially true among transformational leaders.

Transformational leaders' ability to inspire their followers is underscored by Pradhan and Pradhan (2016) in their *Global Business Review* article "Transformational leadership and job outcomes". They demonstrate that previous studies have reported positive influence of transformational leadership on employee's effective organizational commitment and their contextual performance; however, the process by which transformational leadership influences the effective commitment and contextual performance has not yet been adequately studied. More research is needed regarding the affective commitment and contextual performance of meaning-making and meaningful work on the outcomes found in business and industry

Followers are a source of power for leaders, and they have ability to provide, as well as to withhold and withdraw power from leaders (Heifetz & Linsky, 2002; Warren, 2015). Within an organization, a continuous dyad exists between leader and follower. Individuals identify as either a leader or follower and assume a reciprocal role associated with that position—a dyadic contract is at the heart of followership (DeRue & Ashford, 2010).

Supporting followers is a primary responsibility that leaders must uphold. Followership connotes an attitude and behavioral construct—a dyad between leader and follower (Collinson, 2006; DeRue & Ashford, 2010). Recognizing that followership is a state of mind, and is not just an organizational reporting relationship, is an important

distinction that governs how support should be rendered. To hold the dyad together, both sides must understand what it is they are each trying to achieve and how it will directly benefit each of them. "People find meaning [in life and in work] by connecting with others, in a way that makes [both] lives better" (Heifetz & Linsky, 2002, p. 208). This is supported by Kouzes and Posner (2016), who contend that people want to follow a meaningful purpose—"It's what gives significance to the hard work required to do anything extraordinary" (p. 93).

Enabling followers to discover meaning in their work and lives is one way to support followers. Another way to give followers support is to communicate a vision that inspires passion in them and action from them. Doing this requires that followers understand why a leader's vision is achievable and in the best interest of the organization—and by extension the followers individually (Sinek, 2009; Ulrich & Ulrich, 2010).

The universally accepted contract between leaders and their followers is that one will lead and the other will follow. While simple on the surface, it is highly complex beneath what is commonly observed. Several forces come into play when examining followership. Followership is not the same as an employee or subordinate relationship. Followership connotes an attitude and behavioral construct (Collinson, 2006; DeRue & Ashford, 2010). On multiple levels, the research literature speaks of the dyadic level of leader and follower, the individual level, and the organizational level.

It would seem that the way followers follow is probably just as important to enterprise success as the way the leaders lead. If there are exemplary leaders, are there also exemplary followers? Baker-Blackshear (2002) describes five stages leading toward

exemplary followership. Following the individual's hiring and commitment to work for pay, the second-stage follower exhibits commitment to the mission, idea, or organization, or has an internal pledge to an effort or person. The third-stage follower is willing to go above and beyond the routine; the effective fourth-stage follower is capable and dependable; and the exemplary fifth-stage follower could easily be the leader—but sets ego aside and works to support the leader. As implied in this leader-follower dyad, cultivating a followership may be a positive asset to the leader's success. Baker-Blackshear (2002) posits that meaning is not discovered and absorbed all at once, but rather grows in stages as followers develop confidence in their leader, and their leaders in them. As this discovery coalesces, so too does followership; so too does meaning (Baker-Blackshear, 2002).

### **Theoretical Framework of the Five Variables in This Study**

Five variables were identified as possibly contributing to the behaviors of an exemplary consulting firm Managing Partner in Southern California in their discovery of meaning in their leadership. The five variables are: *character, relationships, inspiration, vision* and *wisdom*.

#### **Character**

The character variable is explored in this section. It covers the definition of character, its importance and salient elements found in leaders.

#### **Definition of Character**

Character encompasses one's morality—the essential element of how individuals choose to live their lives (Bass & Bass, 2008; Bass & Steidlmeier, 1999; Moore, 2008; Quick & Wright, 2011; Sankar, 2003). The operational definition for character is

the alignment of a value system that promotes ethical thoughts and actions. These thoughts and actions are based on principles of concern for others through optimism and integrity, while being reliable, transparent, and authentic.

### **Importance of Character**

Character is a foundation upon which all leadership is built—without a strong and viable character foundation, leadership may crumble (Kouzes & Posner, 2006). This is supported by the work of Sarros, Cooper & Santora (2007), who point out that character is viewed as an underlying component of personality—what makes people tick.

Character's importance to leadership is considerable. Peterson (2016) describes character strengths as the "bed-rock of the human condition" (p. 4). It is important to note that a leader's "*reputation* is made by others; but a leader's *character* is made only by [the leader]" (Hill, N. 1928, p.583). Effective leadership begins within the individual—with strong emotional intelligence (Bradberry & Greaves, 2009; Kouzes & Posner, 2007; Lencioni, 2012).

It is through revelation of the self, which begins with the would-be leader and then is revealed to those who would follow, that each knows the other through transparency and authenticity. When known, followers can begin the process of building trust. As revelation continues, factors defining character—morality, ethics, integrity, honesty and trust—come into focus, and followers are able to gain transparency, and to judge and relate to the leader's authenticity (Northouse, 2009).

Guiding the alignment of a leader's value system is the presence of a reliable moral and ethical compass. This is described by Reina & Reina (2007), who argue that successful leaders "demonstrate they consider the best interests of others rather than just

themselves" (p. 39). A leader's morality is an essential character trait for building trust, gaining and keeping power, leaving an ethical footprint, and fostering meaning (Riggio et al., 2010; Anderson, 2015). "Leaders and members of organizations may gain new understandings of the power we have when we act ethically in concert with others" (Cisek, 2009, p. 123). Moreover, Cisek (2009) further explains that "leaders must strive towards a shared meaning and help foster the ethical aim through the daily actions of all individuals within an organization" (p.1). Kouzes & Posner (2012)—in the fifth edition of their book *The Leadership Challenge: How to Make Extraordinary Things Happen in Organizations*—describe the character of some leaders as the embodiment of "these words—*fearless, collaborative, decidedly different, and nimble*" (p.10).

Citing Branson (2009); Heifetz, Grashow & Linsky (2009); and May, Chan, Hodges & Avolio, (2003); Cole, (2016) defines *morally resilient leaders* as "leaders who accomplish organizational purposes through exemplary moral and resilient perceptions and processes, evidencing sustained commitment, positive adaptation, and moral integrity" (p. 18). Effective leadership has been linked to morality and resilience, and these qualities have been observed by multiple scholars to coexist in exemplary leaders.

Leaders influence more than just the bottom line of organizations. They have the power to influence people and communities through the values expressed by their character. In other words, a leader's character becomes the organization's character: *a shared purpose, teamwork, innovation, learning, appreciation, encouragement, and recognition* (Kouzes & Posner, 2007, 2012; Lowe, 2010; Tyler, 2008). Moore (2014) posits that work is connected to a search for meaning in one's life. Creating an organizational culture and orientation can be accomplished in a variety of ways. The way



a job is structured, how individuals are rewarded, and the measures of connectedness among and between members of the organization all have a place in the overall value system present in an organization (Cutler, 2014; Podolny et al., 2004; Smith, 2010). One overarching characteristic of leaders and organizations that signal the existence of outstanding character and character development is a general feeling of optimism by the leader and the organization as a whole.

Fredrickson (2009) views optimism through the lens of *positivity*—a range of emotions—"from appreciation to love; amusement to joy; hope to gratitude, among others" (p.6). In his 2009 book *Positivity: Top-Notch Research Reveals the Upward Spirals That Will Change Your Life*, Fredrickson defines optimism as positive emotions that in the long run can have a positive impact on individuals' character and relationships in a micro view, and on organizations and communities in a macro view. While optimism per se doesn't create positive character, Fredrickson (2009) posits that those with positive character exude optimistic outlooks and positive emotions.

In acquiring positive character traits, leaders learn the importance of building trust and leaving an ethical and moral footprint (Riggio et al., 2010). This is echoed by Anderson (2015), who describes the perception of character as bimodal in that both the follower and leader perceive the resultant actions as ethical. Baird (2010) mirrors other scholars in his statement that "trust is a byproduct or antecedent from acting with integrity or being ethical, valuing and protecting the interests of others, behaving with consistency or predictability, and having professional competence" (p. 126).

Kouzes & Posner (2006b) further define character's trust dynamic as a foundational element upon which relationships are built—which in turn impacts

followership. Personal relationships provide fertile ground in which trust can grow—the more people know about an individual, the more inclined they are to trust that individual (Kouzes & Posner, 2006b). Trust is essential for the establishment and for the survival of relationships, and by extension, leadership per se (Baird, 2010). All of these may impact the meaning one extracts.

Resilience and reliability are other character traits of exemplary leaders. Leaders learn from their experiences and show others the proper and prosperous ways to lead (Moua, 2010; Ulrich & Ulrich, 2010). Surviving the challenges of leadership requires the ability to overcome setbacks and downfalls—resilience. It also demands that competence prevail—reliability (Cole, 2016).

It appears logical that the foundation upon which one builds one's character is critical to the strength and stature of that character. A determination of these foundational elements was the subject of the work conducted by Stone, Russell, & Stone, (2004). Patterson (2012) postulates that the traits of *honesty*, *integrity*, and *trust* are necessary and critical for the construction of moral and ethical character. Kouzes and Posner (2006a, 2006b) go further when describing trust as being honest and keeping commitments. The importance of these traits is such that without them character—and by extension, relationships—would crumble (Kouzes and Posner, 2006a, 2006b).

### **Relationships**

The hallmark of leadership—emanating from the leader-follower dyad—is relationships. Without strong relationships with followers, leaders are denied power—an essential element needed to lead. Relationships are the result of a strong, viable character (Kouzes and Posner, 2006a).

## **Definition of Relationship**

The definition of relationships is the bonds that are established between people through encouragement, compassion, and open communication. These bonds subsequently lead to feelings of respect, trust and acceptance (Frankl, 2006; George, 2003; George, Sims, McLean & Mayer, 2007; Henderson, 2011; Kouzes & Posner, 2006b, 2012 & 2016; Mautz, 2015; McKee et al., 2008; Reina & Reina, 2006; Seligman, 2011; Smith, 2011; Ulrich & Ulrich, 2010). Operationally, in this study, relationships are defined as authentic connections between leaders and followers. These bi-modal relationships are involved in a common purpose through listening, respect, trust, and acknowledgement of one another.

## **Importance of Relationships**

Leadership relies on building relationships (Reno, 2011), where both members of the dyad simultaneously accept the other as leader, and the other accepts the one as follower (DeRue & Ashford, 2010). Before leaders can receive power, there must be a willingness on the part of followers to surrender it (Ulrich & Ulrich, 2010). Antecedent to giving a leader the power to lead are the essential elements found in positive relationships—*honesty*, *integrity*, and *trust* are the cornerstones of relationships (Heifetz & Linsky, 2002; Houston, 2014; Reina & Reina, 2006; Stone et al., 2004).

Strong relationship is the hallmark of strong leadership (Houston, 2014). Leadership not only requires strong, positive results in the bottom-line aspects of an organization, but also requires strong, positive relationships with oneself and others. Communicating a sense of *purpose* may add to a sense of trust—a prerequisite for developing relationships, and for inspiring others to follow (Houston, 2014).

Relationships take conscious work (Smith, 2011). There are other ways of creating strong relationships.

Northouse (2009) introduces *authentic leadership* in his book, *The Culturally Intelligent Leadership: Leading through Intercultural Interactions*, in which he posits that the work of relationships begins with a leader developing authentic connections with followers. Authentic relationships begin with authenticity of character—as measured by strong emotional intelligence (Bradberry et al., 2009). Authenticity of character enables trust which morphs into a deep understanding of the leader that embodies the relationship (Bradberry et al., 2009; Kouzes & Posner, 2007, 2012; Riggio et al., 2010; Stone et al., 2004). Building authentic relationships takes time and dedication (Moua, 2010). It is widely understood that relationships play a foundational role in connecting the leader-follower dyad (Collinson, 2006; DeRue & Ashford, 2010; Holland, 2015). A necessary reciprocity exists between leader and follower in successful dyads—as posited by DeRue and Ashford (2010). When leadership is “unconnected,” leader effectiveness is expected to suffer (p. 3).

"Our sense of abundance is enhanced by meaningful relationships" (Ulrich & Ulrich, 2010, p. 39). Twenty-five years earlier, O'Toole (1995) examined relationships in his book—*Leading Change: The Argument for Values-Based Leadership*—as a "powerful force" (p.182) that holds together the culture of organizations and societies.

In an *a priori* sense, "Leadership [by nature] is a relationship. It's a relationship between those who would choose to lead and those who would choose to follow" (Kouzes & Posner, 2006a, p. 48). Heifetz & Linsky (2002) demonstrate that connecting with others—as a natural human trait—is a source of energy and strength that makes lives

better. Relationships, dependent on beliefs and perspectives, might be the conduit through which meaning flows. This is not a one-time connection; rather, leaders need to reenlist these relations every day and on a uniquely personal basis—offering our best selves (Kouzes & Posner, 2006a).

At the root of relationships and subsequent cooperation is trust—attitudes, intentions, and behaviors come together to create, shape, and form trust (Galford & Drapeau, 2003; Reina & Reina, 2006, 2007; Sinek, 2014). In a business environment—such as the consultancy industry—competition places extraordinary pressures on organizations and people to excel and achieve at record levels (Hill et al., 2015). Accomplishment at the extraordinary level involves cooperation and relationships with others. “Without trust, employees have little interest in being creative, taking risks and collaborating. That *generative power* begins to wane and performance is diminished. However, trust can be rebuilt after it’s been broken. Indeed, both facets—building and breaking—are necessary and natural in all relationships” (Reina & Reina, 2007, para 1).

For trust to survive, trust needs to be mutual. “Trust is much like love—we know it when we [feel] it” (Harvey and Drolet, 2006, p. 21). Harvey and Drolet (2006) expose five characteristics that support mutual trust: *interdependence*—“When I need you and you need me”; *consistency*—“People trust those who are consistent from word to deed and from deed to deed”; *honesty*—“People who lie, cheat, and double-deal are simply not trusted”; *affability*—“Likeable people are easier to trust”, albeit not a solution in and of itself; and *extension of trust*—“Those who give trust get trust” (Harvey and Drolet, 2006, p. 21-23).

Exemplary consulting-firm Managing Partners are in the unique position of being able to impact the lives of their followers and constituents, the organization as a whole, and even the world under certain circumstances. Personal relationships should be considered a necessity for exemplary leaders' formation of meaning. McKee et al. (2008) notes that the degree to which a leader is able to resonate with their followers and constituents will determine the extent to which that leader will create meaning for them.

### **Effects of Relationships on Meaning-making**

Mautz (2015) prescribes three measures in his book *Make It Matter: How Managers Can Motivate by Creating Meaning* that can enhance leaders' attempts at creating relationships that serve as a conduit for transferring meaning. Three prescribed actions are: *direction*, *discovery*, and *devotion*. Direction can help people find a sense of significance and purpose. Discovery opens opportunities to learn, grow, and influence while helping people feel valued and valuable. Devotion cultivates authenticity and caring and drives out corrosive behaviors that can unknowingly drain meaning at work (Mautz, 2015). Leaders use these three principles when they create relationships that are devoted to forming a life-enhancing experience.

Creating a work environment and an organizational culture that infuses meaning into workers' everyday lives enhances meaning for everyone. This is made clear in the legacy a leader leaves behind. Expressing this notion of *legacy*, Kouzes & Posner (2006a) stipulate:

When [leaders] choose to lead every day, [they] choose aspirations of long-term significance over short-term measures of success. While looking forward may be the quality that differentiates leaders from other credible people, the future does

not belong to leaders alone. Leaders are its custodians; their constituents are its occupants. The occupants have a role in shaping where they will live (p. 178).

## **Inspiration**

Throughout history, inspiration has often been cited as a powerful tool for driving change and achieving success (Smith, 2014). It is a fundamental part of human nature that has existed in Western consciousness since ancient times (Parra, 2014). Sources of inspiration—what inspires one to act—play an important role in what is perceived to inspire and how one acts upon it (Chan, Dow, & Schunn, 2014; Crowley, 2011; Eckert & Stacey, 2000; Hersey, 2001; Gallo, 2013). Trust leads to cooperation and is an antecedent to inspiration (Reina & Reina, 2006).

### **Definition of Inspiration**

Theoretically, *inspiration* is a source of contagious motivation that resonates from the heart, transcending the ordinary and driving leaders and their followers forward with confidence (Kouzes & Posner, 2007; Smith, 2014; Thrash & Elliot, 2003). In this study inspiration is defined as the heartfelt passion and energy that leaders exude through possibility-thinking, enthusiasm, encouragement, and hope to create relevant, meaningful connections that empower followers (Crowley, 2011; Kouzes & Posner, 2007; Smith, 2014; Thrash & Elliot, 2003; Zenger, 2013).

### **Overview of Inspiration**

This chapter examines inspiration from four prominent directions. It examines four theories about inspiration. It explores the literature for sources of inspiration—using existing research, inspiration is examined for how individuals find it. It further explores

the ways people become inspired. Finally, the characteristics of inspiration are compiled in a way that examines how they directly affect corporate leadership.

### **Theories of Inspiration**

Four theories of inspiration are included in this section: (1) *origination*—from outside the self vs. inside the self; (2) *direction*—such as "by something or towards something"; (3) *enablement*—inspiration enables self-actualization in individuals; and (4) *experientialism*—such as how organizations experience inspiration.

***Origination—outside the self vs. inside the self.*** This principle focuses on the origins of inspiration—from where inspiration comes. According to Hart (1998), the phenomenon of inspiration is a significant and distinct epistemic event that many ordinary people can experience: "although inspiration cannot be willed, it can be cultivated" (Hart, 1998, p. 7, para 2). "The origins of inspiration are characterized by: *evocation, motivation, and transcendence*" (Thrash & Elliot, 2004, p. 871-889). In 2004, Thrash and Elliot explained three states. *Evocation* is the action in which inspiration comes to an individual unwilling—not feeling responsible for becoming so inspired. *Motivation* refers to expressing what was realized, and is characterized by a natural desire to satisfy one's needs. *Transcendence* refers to being oriented toward something better or more important than the status quo—seeing better alternatives.

***Direction—inspired "by something" vs. inspired "toward something".*** This theory opens the direction in which inspiration takes the inspired. Thrash and Elliot (2003) suggests two directions—the *passive state* of being inspired "by" something and the *active state* of being inspired "to" act on and do something. This was similarly echoed by Hart et al. (2000), reporting that "Inspiration was occasionally translated into



immediate action; at other times, it was used as an impetus or affirmation to steer one's energies in a particular direction; for others it shifted their sense of being" (p. 33-40)

***Enablement—inspiration enables self-actualization.*** This theory illustrates an important by-product of inspiration—self-actualization. Mark C. Crowley (2011) draws a unique circle around a familiar triangle—Maslow’s pyramid hierarchy—in which he recommends that leaders consider the top of the pyramid, where followers’ needs evolve into a desire for connection, personal esteem and feelings of accomplishment. Being inspired to achieve this higher level fits the Maslow paradigm (1943, 1954), and is a 21<sup>st</sup>-century leadership model that places emphasis on making followers feel appreciated and engaged in reaching a higher level of existence. This builds on Thrash & Elliot's (2003) *active state* of being inspired *to* something. Crowley goes so far as to insist that leadership needs to inspire the heart: “[what] fails to inspire, is ruinous to employee engagement” (Crowley, 2011, p. 23). At the center of Crowley's argument, he professes that touching the heart inspires the mind.

***Experientialism—inspiration alters the status quo.*** The fourth theory of inspiration involves how people experience their inspiration. Using the works of Thrash & Elliot (1998-2003), Smith (2014) created a model that captures *disruptiveness*, *relevance*, and *attainability*. Smith finds inspiration in situations calling for change and success, as well as those situations where innovative breakthroughs are objectified. The effect is more inspiring to the extent it: (1) is in line with the way people typically think about things, (2) is perceived as relevant to people’s core motives, and (3) is perceived to be attainable (p. 113).

## **Sources of Inspiration**

Sources of inspiration play an important role in the formation and nature of inspiration (Chan et al., 2014; Crowley, 2011; Eckert and Stacey, 2000; Gallo, 2007). For example, Jennings (2012) reports that individuals experience greater inspiration "if the inspirational content is concordant with individual meaning and values" (p. vii). Vivian Giang describes nine sources of inspiration. Each of these sources contributes an emotion or conviction. The nine sources include: (1) from doubt by others, resulting in a firm resolve; (2) from game-changing people who provide a lesson on success; (3) from one's own failures, which inspire an *"I'll show them"* response; (4) from dreaming that anything can become possible; (5) from reading and researching to gather new ideas and ways of thinking; (6) from taking risks to expand the comfort zone and the envelope of thinking; (7) from curiosity, which opens the unknown; (8) from masters of change; and (9) from other people's failures.

## **How People Are Inspired**

Chan et al. (2014) reports that innovative breakthroughs are often inspired by past experience—things and ideas that one has interacted with in the world—but warns that past experiences can create a kind of tunnel vision when seeing the future through the rearview mirror. To remedy the shortcoming, Chan's research (2014) focused on creating distance and diversity in the sources of inspiration—a way of maximizing breadth and depth of one's influences.

## **Characteristics of Inspiration**

Passion and insight are important characteristics of inspiration, according to Uribe (2012)—who posits that executives' values and leadership styles are responsible for

shaping the corporate culture. Looking deeper than corporate culture, an examination of Maslow's pyramid hierarchy illuminates another aspect that may have a profound impact on the way inspiration helps corporate employees respond to leaders. According to Maslow (1943, 1954), there is a deep-seated tendency for people to aspire upward in the psychological pyramid to a higher order of satisfaction. "Inspiration can be a powerful tool in motivating people to act morally, and assist other people to become their best selves" (Smith, 2014, p. iii). As a motivational force and catalyst for upward movement, and as a fundamental part of the human condition, inspiration fits more tightly with the higher levels reported by Maslow than they do with the lower levels in his pyramid. Crowley (2011) reports that the basics of salary and benefits lose ground to the way in which employees are treated at higher levels of development. Crowley (2011) explains how historically business placed emphasis on making profit, and employees were grateful to be part of that process in exchange for income.

With technological advances companies are giving greater weight to institutional knowledge, creative thinking, and sophisticated collaboration—all of which are people-driven—and in sharp contrast to a time when machines made the difference and employee welfare was given little attention.

From an employer's perspective, Crowley illustrates in his 2011 book *Lead from the Heart* that a new 21<sup>st</sup>-century leadership model—one that places emphasis on making people feel appreciated and needed—has to replace the archaic approach that ignores people's desire for self-actualization and personal esteem. "By supporting people to achieve their goals, you build a reputation for growing talent" (Crowley, 2011, p.103). In

this regard, inspiration not only affects leaders, but permeates the heart of their followers as well—giving meaning to everyone's lives and the work they do.

Nine inspiration-driven characteristics are brought out by Gilson (2015) and are supported in total or in part by others (Abuhamdeh & Csikszentmihalyi, 2012; Gotz, 1998; Hart, 1998; Jennings, 2012; O'Grady & Richards, 2011; Thrash & Elliot, 2004; Thrash, Elliot, Maruskin & Cassidy, 2010; and Thrash, Maruskin, Cassidy, Fryer, & Ryan, 2010). Gilson's (2015) nine characteristics include: (1) inspiration is two-sided—a trigger and a target—being inspired *by* something and being inspired *to* something (p. 50); (2) inspiration is transcendent; (3) inspiration is largely positive psychologically; (4) inspiration is a phenomenologically individual experience; (5) inspiration is an unexpected, spontaneously generated event; (6) inspiration is a holistic occurrence linking both the rational mind and the non-rational heart; (7) inspiration is contagious and transmissible to others; (8) inspiration requires receptivity—an openness to divergence, ambiguity, letting go, and trust in the unknown; and (9) inspiration is an entity that can be cultivated personally and within an organization.

Leaders might inspire followers indirectly by the way employee jobs are structured, i.e., job-design. Podolny et al. (2004) underscores the transactional aspects of leadership in the day-to-day design of a particular job. Smith takes this further, stating that effectively designing jobs "to help employees connect their day-to-day actions with a higher purpose (coherence), engagement in a valued community (communion), a path toward growth and development (agency), leaders may be able to indirectly affect the inspiration employees experience" (Smith, 2014, p. 112).

Smith (2014) outlines characteristics that make potential actions or possibilities more inspiring. To be truly inspiring, possibilities should be disruptive, relevant and attainable (Smith, 2014). The term *disruptive* is well-chosen because inspiration changes the way one thinks about the future. Together, these characteristics help to provide influential antecedents to the experience of inspiration. In partial contradiction, Kaufman (2011) asserts that what makes an object inspiring is intrinsically more subjective than objective, and more subjective than how attainable it is. "'Openness to experience' often came *before* inspiration, suggesting that those who are more open to inspiration are more likely to experience it" (Kaufman, 2011, para. 4). Kaufman also finds that mastery of work also came *before* inspiration—suggesting that inspiration favors the prepared mind.

Kaufman (2011) argues that inspired individuals were not more conscientious—suggesting that inspiration happens to an individual and is not something an individual can force to happen. Nevertheless, Kaufman (2011) does admit that inspiration can be encouraged—provided that we do not stand in its way. Inspired people were more intrinsically motivated and less extrinsically motivated. Inspiration was least related to variables that involve agency or the enhancement of resources, again demonstrating the transcendent nature of inspiration. Inspired people have greater psychological resources—self-confidence, self-esteem, and optimism.

There is evidence that inspiration can shed light on an individual's values and interests (Jennings, 2012). Inspirational experiences affect the way goals and subsequent behaviors—aligning with an individual's long-term interests and values—are established. However, it is not known *how* the experience of inspiration affects behavior—which remains the subject of future research. Jennings (2012) reports that

pursuing goals that align with personal motivation can lead to better outcomes and enhanced feelings of well-being. Additionally, given inspiration's contribution to various creative endeavors and humanitarian endeavors, inspiration can potentially promote the growth of individuals and society (Sheldon & Elliott, 1999).

"Leaders use inspiring actions to attempt to influence by persuasive and motivational communication that activate and induce the organizational actions required by the transformation" (Hersey et al., 2001 p.426). Inspiration admits new ideas by transcending ordinary experiences and boundaries—the ability to "think outside the box". Inspiration breaks apathetic inertia and is transformational toward our perception of our capabilities. Inspiration has a major effect on important life outcomes—it is not elusive—and can be activated, captured, and manipulated (Kaufman, 2011).

### **Importance of Inspiration**

When people have confidence in one another's abilities, intentions, and commitment, they're more willing and able to participate, collaborate, and innovate. They are inspired (Reina & Reina, 2006). Inspiration "has important implications for how people live and experience their own lives" (Smith, 2014, p. 113). Scott Barry Kaufman (2011) in his blog post "Why inspiration matters" on Harvard Business Review relates that Leo Tolstoy's *The Death of Ivan Ilyich*, translated by Robert Nesbit Bain, demonstrates the power of inspiration. Ivan received inspiration from his family, and in realizing that he was alleviating his family's suffering at the time of his death, he was able to achieve meaning in his life on his deathbed. "Inspiration awakens us to new possibilities by allowing us to transcend our ordinary experiences and limitations" (Kaufman, 2011, para 1).

There are several immediately observable inflections directly related to the effects of inspiration. Inspiration promotes positive organizational engagement and lessens negativity by those who would be inspired. Inspiration has a beneficial effect on creativity—delivering meaning and purpose in work output. Inspiration drives individuals to diligently achieve goals and objectives. Positivity gained from inspiration has impacted individuals' overall health and wellbeing (Heath & Heath, 2010; Kaufman, 2011; Thrash, Elliot, Maruskin, & Cassidy, 2010).

### **Leadership and Inspiration**

There is a direct connection between leadership and inspiration. The responsibility of inspiration begins with the leader and permeates the organization (Kaufman, 2011; Kouzes & Posner, 2007). In working with followers, inspiration is often incomplete—it is crucial that conversation accompany the inspiration process. "If you agree with what has been said but the information is incomplete, build. Point out areas of agreement, and then add elements that were left out of the discussion" (Patterson et al., 2012, p. 172).

Quoting Wallas (1926), O'Grady & Richards (2011) discuss how inspiration emerges as an "*ah-ha*" moment. There are four stages leading up to this precious moment: *preparation stage*—where research and analysis occur; *incubation stage*—where the idea "simmer"; *illumination stage*—where flashes of insight occur; and *verification stage*—marked by testing and refinement. Kouzes & Posner (2007) echo inspiration's role in leadership and in fulfilling the need to create meaning and purpose in the lives of followers.

## **Effects of inspiration on followers**

The role of inspiration among followers is often overlooked and underestimated, according to Kaufman (2011). "Inspiration awakens us to new possibilities by allowing us to transcend our ordinary experiences and limitations" (Kaufman, 2011, para. 1). Kaufman (2011) reports that the state of inspiration is not like the state of normal living—it is noticeably different from normal, and at a higher level than ordinary—resulting in more creative outcomes.

Kaufman (2011) describes inspiration in several ways as determined by the effects it produces. Among the effects produced by inspiration is a higher level of creativity. Inspiration also affects how people respond in daily life—those with more frequent incidents of inspiration say they accomplish more of their goals than people with fewer incidents of inspiration. Inspiration also produces a general sense of well-being over time. Dess and Picken (2000) note in "Changing roles: Leadership in the 21st century", that an all-encompassing change is needed in organizations where managers must change from efficiency to effectiveness.

## **Meaning and Inspiration**

In a changing and challenging environment, according to Dess and Picken (2000), the demands placed on leadership involve a complex set of challenges—requiring a shift away from the status quo that is focused on organizational stability, operational efficiency, and predictable performance. This includes shifting away from current processes for planning, decision-making, and organizational structure. To meet the challenge, "organizational leaders must 'loosen up' the organization—stimulating innovation, creativity and responsiveness, and learn to manage continuous adaptation to



change—without losing strategic focus or spinning out of control" (Dess and Picken, 2000, p. 19).

Inspiration is a necessary tool in creating meaning—not only for the leader, but also for followers (Zenger & Folkman 2013). Inspired leaders are more able to connect emotionally, establish a clear vision, and communicate effectively. "They [are] ardent champions of change. They [are] perceived as effective role models within the organization" (Zenger & Folkman 2013, para. 6). Inspiration enables meaning, which enables employees to become productive. "Productive employees are the ones who are passionate, focused, and excited to be there" (Zwilling, 2014, para. 11). Inspiration ignites passion and fosters excitement—necessary components for meaning to occur (George, et. al., 2007; Ricciardi, 2014, Senge, 2006).

### **Inspiration and Consulting-Firm Managing Partners**

Among consulting-firm Managing Partners, there are four characteristics that have consistently received high marks for importance. The most important personal characteristics include: *honesty; forward-thinking; competency, and inspiration* (Kouzes, & Posner, 2012). All organizations need managers as well as leaders—without strong managers there's chaos, and without effective leaders there's lethargy and dilution (Landsberg, 2003) (see Figure 1). The way in which organizations train and support their managers and leaders can have a dramatic impact on company performance.

**Figure 1.**

*Distinction between Managers and Leaders in Terms of Inspiration*

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<b>Manager</b>	<b>Leader</b>
Uses Control	Relies on Trust
Structures the team and organizes it	Engages people and aligns them to the new direction
Applies incentives	Inspires
Appeals to "official" approach	Appeals to common sense
Emphasizes structure, tactics, and systems	Emphasizes core values, shared good, and philosophy

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As shown in Figure 1, managers have a more direct, structured, rule-based approach with their followers—for example, relying on policy and systems; promoting incentives; and utilizing control. Leaders, on the other hand, have a predominantly indirect, influential approach—for example: building trust with employees; engaging followers with vision and a higher sense of purpose; and emphasizing the core values of the organization. Managers use a "carrot and stick" approach to drive followers, while leaders rely on inspiration that enables followers to drive themselves.

**Vision**

**Definition of Vision**

Vision is a bridge from the present to the future, created by a collaborative mindset—adding meaning to the organization, sustaining higher levels of motivation, and withstanding challenges (Kouzes & Posner, 2009, 2012; Landsberg, 2003; Mendez-Morse, 1993; Nanus, 1992). Operationally, vision is foresight demonstrated by a compelling outlook on the future shared by leaders and followers who are engaged to create the future state.

Beginning with what vision is not, it's noted that vision is not a top-down mandate. Kouzes & Posner (2006a-c, 2009, 2012, 2016) speak of vision not as a top-down promise for the future, but rather as a shared goal that articulates the hopes, dreams,

and aspirations of followers—something they want and which they can passionately support. "Vision is not: 1) a mission statement; 2) a simple statement of what exists now; 3) boring and unimaginative; and 4) written, but not used" (Harvey and Drolet, 2006, p. 36). On the positive side, vision is about a compelling, co-created, forward-thinking future state of an organization (Kouzes, 2012). This vision is shared with mobilized followers and stakeholders who are enthusiastic participants in a feedback-seeking climate; where communication is frequent, accurate and candid; and in which mindset and behavior changes are supported and rewarded, and synchronicity is apparent. Huss (2006, p. 130) quotes Seligman (2006) as saying: "In their positive vision of the future, they convey a sense of 'optimism, hope, confidence, trust, and faith'" (p. 261) with regard to women and vision (Anderson & Ackerman-Anderson 2010; Farrell, 2015; Harvey and Drolet, 2006; Huss, 2012; Kouzes & Posner, 2012; Lane-Schmitz, 2012; Senge et al., 2014). Exemplary leaders have the ability to see the world through the eyes of their followers. Through these many individual lenses, leaders construct a vision that encompasses their own view of life in collaboration with the views shared by their followers (Cuppett, 2014).

"Painting an exciting vision of the future [and] marshaling the enthusiasm of the team to aspire to a higher goal" (Zenger & Folkman, 2013, para. 9) is an essential starting point for transformational change. There is a futuristic, driving, antecedent linkage tying a leaders' passion for vision to a positive affinity for transformational leadership— affectively, cognitively and motivationally (Qin, 2014).

The mission to "'incubate' dreams" for the purpose of cultivating a vision is echoed by Hart et al. (2012) in their book *Transpersonal Knowing* (p. 173). Following

inspiration's role in refinement, leaders emerge with a clearer idea or vision of where they need to go, and then how to communicate its meaning, and make connections with their followers. The most common component found in effective leadership was vision (Peterson, 2016; Lane-Schmitz, 2012). Among the three main characteristics of vision—refinement, communication, and connection—is inspiring constituents to act (Ibarra & Obodaru, 2009).

The one element that ignites leaders' transformational vision is *passion*. However, passion for vision was empirically shown to be distinct from positive emotions and job satisfaction (Qin, 2014). From an overview perspective, Kouzes & Posner (2006a) intimate that passion contains elements of clarity and values. They go on to report that [leaders] who have passion, clear vision and values have greater commitment to their organizations than are those who do not have this essential element. It takes courage to make a stand at crucial moments and to assume leadership's risk by espousing a clear vision to everyone—which is why passion for one's vision is so warranted (Kouzes and Posner, 2006a). Qin (2014) professes that organizations should select leaders that have a high degree of passion for their vision, and integrate passion in the performance evaluation of leaders.

Sources for vision come from several directions. These directions are multi-dimensional and timeless. Inspiration gives life to vision; followers' dreams, values, and earnest commitment provide depth to vision; the organization's tenets give prominence to vision; external environmental horizons provide perspective on vision; and the inner self can be a source of vision (Anderson & Ackerman-Anderson 2010; Harvey and Drolet, 2006; Senge et al., 2014). "[Followers] want to hear how their dreams will come true and

their hopes fulfilled—they want to see themselves in the picture of the future that the leader is painting" (Kouzes & Posner, 2006a, p. 108). Leaders also need to make their vision a shared vision (Cuppert, 2014; Kouzes & Posner, 2009, 2016). To be a true organizational vision, it must be a shared vision—a collective aspiration of followers (Mohajer-Adams, 1999).

"Exemplary leaders are forward-looking. They are able to envision the future, to gaze across the horizon and realize the greater opportunities to come." (Kouzes & Posner, 2012, p.104). Visionary thinking extends to the organization as a whole; it evolves into a strategy and then eventually into a plan (Peterson, 2016; Kouzes & Posner, 2012).

### **Leadership and Vision**

"Visionary Leadership is considered to be within a genre of leadership which first emerged in the mid-1970's" as a class of theories known as "*The New Leadership Theories*" (Loughead, 2009, p. 3). "Visionary leaders have a *gestalt thinking style*, are collaborative, use effective communication techniques, and have effective relationship skill to connect with followers and constituents" (Loughead, 2009, p. 98). A leader's vision not only creates a strategic azimuth, but also "plays a critical role in motivation" (Conger, 1989, p. 43). Vision does not naturally occur—it needs a catalyst; the driving internal force that explains the creation of vision is a passion for vision (Qin, 2014).

What makes vision a unique leadership talent is that "it provides a broad perspective on an organization's *purpose*" (Conger, 1989, p. 38). Sinek (2011) emphasizes the importance of explaining the "*Why*" of a vision and is a statement in support of organizational purpose. Exemplary transformational leaders see vision as a motivating force, drawing energy from the values expressed within (Dik et al., 2013). As

described by Burt Nanus (1992), the formula for successful visionary leadership is a combination of actions, talents and forward thinking, as shown in Figure 2.

Figure 2.

*Visionary Leadership Model*

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$$\text{Vision} + \text{Communication} = \textit{Shared Purpose}$$
$$\text{Shared Purpose} + \text{Empowered People} + \text{Organizational Change} + \text{Strategic Thinking} = \textit{Visionary Leadership}$$

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Vision and vision statements focus followers on the future horizon and unify their efforts in that direction (Harvey & Drolet, 2006). "Vision is about a common goal, not just about what the leader wants" (Denning, 2011, p.246). It's important to keep in mind that a vision is not a plan, per se—it's a look into the future, via storytelling, and describes how the organization could be when it is finally achieved. Visionary leadership affects perceptions of a company's reputation as a great place to work (Denning, 2011; Harvey & Drolet, 2006; Henderson, 2011).

**Meaning and Vision**

Decades ago, Nanus (1992) talked of meaning as coming from the right vision: "With a shared vision, individuals ... see themselves as being part of first-class team ... providing valuable products or services" (Nanus, 1998, p. 17). Cranston and Keller (2013) profess the idea of a Meaning Quotient (MQ) that can help "create meaning and significantly enhance workplace productivity. Trust, respect, constructive conflict, a sense of humor, a general feeling that 'we're in this together,' and effective collaboration" (Cranston & Keller, 2013, para. 2). An environment with a high *emotional quotient* (EQ) supports the ability to share vision. When the EQ of a workplace is lacking, employee

energy dissipates in the form of office politics, ego management, and passive-aggressive avoidance of tough issues (Cranston & Keller, 2013). "The right vision creates meaning in workers' lives—people need to feel meaning in their lives—especially where traditional sources of family, church, and community have been losing their ability to supply a sense of purpose ..." (Nanus, 1992, p. 17). Leaders with a vision tend to be more successful when they discover a deep-seated meaning in that dream (Ulrich & Ulrich, 2010). Having a clear view of where to go, and the ability to excite followers to believe in this place, are requisites that enable vision to impact their followers (Henderson, 2011; Lane-Schmitz, 2012). When followers can visualize the destination, there is more willingness to trust the vision—leaders need to help their people see the place they are being encouraged to go (Sinek, 2014).

### **Wisdom**

Perceptions about wisdom are as old as mankind's need to make decisions. Wisdom incorporates the characteristics of knowledge, thought, deliberation and action applied to situations that are on the one hand different, yet bear similarity to past experiences. It can be surmised that applied action adds to the knowledge, thought and deliberation characteristics for the next time (Kilburg, 2013). "It's axiomatic that history is made by leaders, and in order for later generations to understand what happened ... they must understand what [leaders] did or did not do" (Kilburg, 2013, Chapter 1, para. 1)

### **Definition of Wisdom**

Scholars cumulatively define *wisdom* as the ability to utilize cognitive, affective, and reflective intelligences to discern unpredictable and unprecedented situations with beneficial action (Chandler, Michael, & Holliday, 1990; Clayton & Birren, 1980;

Dittmann-Kohli, Freya, & Baltes, 1990; Kekes, 1983; Pfeffer, 2010). Operationally, the wisdom variable is defined as the reflective integration of values, experience, knowledge, and concern for others (Küpers & Pauleen, 2013) to accurately interpret and respond to complex, ambiguous, and often unclear situations (Achenbaum & Orwell, 1991; Ardelt, 2003).

### **Theories of Wisdom**

Several noted scholars have written about wisdom from multiple perspectives over the last 20 years. "Wisdom is generally considered the pinnacle of insight into the human condition and about the means and ends of a good life" posits Baltes & Staudinger (2004, p. 122). This section contains some of the central theories describing wisdom by several noted authors.

**Wisdom is an intertwining of multiple dimensions and disciplines.** The multiple dimensions of this intertwining principle were advanced by Sternberg (1998). *The Balance Theory of Wisdom* suggests that wisdom is reflected in five components: (a) general and specific knowledge about life; (b) general and specific knowledge about judgment and advice; (c) lifespan and [developmental] relationships; (d) knowledge about values, goals, and priorities; and (e) uncertainty, i.e., knowledge about the unpredictability of life (Sternberg, 1998, p. 349).

This multidimensional principle is further advanced by Baltes and Staudinger (2000): "Implicit and explicit psychological theories of wisdom are intertwined" (p. 124). Baltes and Staudinger (2000) revealed five *implicit conclusions* about wisdom and wise people: (a) wisdom is a distinct concept from psychological concepts such as social intelligence, maturity, or creativity; (b) wisdom is related to higher levels of human



development; (c) wisdom illuminates the interaction of intellectual, affective, and motivational aspects of human functioning; (d) wisdom includes the ability to listen, evaluate, and to give advice; (e) wisdom is centered on positive outcomes and the wellbeing of all.

**Wisdom can be cultivated and developed across demographics.** This principle owes its origins to the work of Susan Bluck and Judith Glück (2011, 2013). There are four antecedents leading to the cultivation and development of wisdom—Mastery, Openness, Reflectivity, and Emotion Regulation and Empathy (MORE). *The MORE Life Experience Model* (Bluck & Glück, 2011, 2013) is underscored by Amy Quinn (2011) in her dissertation *In Defense of Wise Emotions: The Relation between Emotion and Wisdom in Autobiographical Memories*. Quinn states this in her study: "This study extends Bluck & Glück's 2011 study by examining the nature of emotions in individuals' recollection of events in their lives in which they gained and used wisdom" (Quinn, 2011, p. ii). Findings from Quinn's study revealed that gender and age have no statistically significant differences with regard to wisdom. More importantly, participants indicated that wisdom was more frequently gained from negative experiences; however, when describing how they used wisdom, participants more frequently used positive words and expressions.

The key aspect of wisdom is the ability to direct our actions in *unpredictable* and *unprecedented* situations. Wisdom is vital to leadership—it is derived from both internal insight into oneself and external insight into the people who would be led (Achenbaum & Orwoll, 1991). Wisdom plays an essential role among exemplary leaders—according to AM Azure Consulting Ltd. (2008), "Wisdom is associated with higher levels of personal

mastery, general wellbeing, life satisfaction and purpose in life" (p. 16). There are three aspects to wisdom: (1) reflective; (2) cognitive; and (3) emotional (AM Azure, 2008).

These three areas contain seven characteristics that, when taken together, point to leadership that is in touch with its inner self, aware of the environment, and marked by strong emotional intelligence (EQ). These are shown in Figure 3.

**Figure 3.**

**"Seven Pillars of Wisdom"**

- 
- Time Perspective
  - Emotional Maturity
  - Trade-Off Judgment
  - Psychological Empathy
  - Reflective Life Experience
  - Pragmatic Problem-Solving
  - Making Sense of Ambiguity
- 

AM Azure Consulting Ltd. (2008)

Exemplary leaders understand that wisdom is not an "*encyclopedia of facts*", but rather a "*library of interpretations*"—it is not what is known, but how that knowledge is utilized (AM Azure Consulting Ltd 2008, p. 9).

**Importance of Wisdom**

Wise people are able to see intuitively how to respond to a situation, but they are also able to deliberate when intuition is silent or yields a poor choice. "Wise people have an ability to tell when to go with their gut and when to deliberate more" (Swartwood, 2013, p. 136). Ethics is an integral part of wisdom. Barone (2013) finds a strong correlation between wisdom and ethics. Swartwood (2013) defines *practical wisdom* as the intellectual virtue that enables a person to make reliably good decisions about how, all things considered, to live and conduct themselves. Developing wisdom requires that people shed their old constructs and replace them with more reliable models (Klein,

2009). In making complex decisions, we often judge our choice—post-decision—as having acted wisely, or with wisdom. Organizational leaders are no exception; when they do not act wisely, their organization suffers, as does the greater society.

What skills are needed to develop wisdom? The short answer is to live a long and experience-filled lifetime—the longer one lives, the more experiences fill their life-long wisdom basket (Hunhui, 2013; Warm, 2011). While both younger and older individuals can obtain wisdom, Barone (2013) advises that "the older adult has advantages to obtaining wisdom that come from a lifetime of experiences in relationships, family matters, and a perspective about the important things in life" (p. iii). Thematic analysis conducted by Spano (2013) points to a link between character and wisdom—"access to a moral code of ethics as a source of wisdom"—in that both attributes play an integral role in the act of leadership—and are rooted "in a commitment to doing the right thing for the organization or society-at large" (p ii).

Warm (2011) posits that education—not necessarily institutional learning—is an important source for accumulating wisdom. Warm (2011) expands this position in saying that "education" provides holistic intelligences which play a role in the development of wisdom. Citing several scholars, Warm (2011) defines the holistic intelligences responsible for acquiring wisdom over a lifetime as including: Physical Intelligence (PQ); Cognitive Intelligence (IQ); Emotional Intelligence (EQ); and Spiritual Intelligence (SQ).

"Wisdom significantly predicted organizational citizenship behavior directed at organizations—OCBO" (Neil, 2014, p. iii). In his work, Neil discusses how wisdom training can enhance productivity. All forms of OCBO directly enhance company productivity (Moon, Van Dyne & Wrobel, 2005; Riggio et al., 2010). Individual

characteristic traits related to wisdom and self-knowledge include: *curiosity, love of learning, open-mindedness, creativity, and perspective* (Seligman, 2006). However, Spano (2013) reminds us that "even wise individuals are not wise all the time" (p. 181). In an overall sense, wisdom enables decision-making to effectuate movement in a positive direction—either for the organization or the common good in society at large (Warm, 2011; Spano, 2013).

Wisdom enables leaders to lead deeply. "*Leading deeply* makes a difference through tapping into meaning and purpose" (Warm, 2011, p. iv). In his work *Perceptions of Executive Coaches about Wisdom in Organizational Leaders*, Livingston (2012) posits that the constructs in the WML may provide an understanding of how wisdom can be developed in organizational leaders. However, the unique qualities of wisdom defy capture by standard personality assessments and traditional psychometric intelligence tests (Kunzmann & Baltes, 2005).

### **Role of Wisdom Among Managing Partner Executives**

The Recognition-Primed Decision (RPD) model demonstrates how expert decision-making skill is expressed during times of complex choice. The RPD model was developed to understand how experts made good, real-world decisions (Swartwood, 2013). More relevant today is the finding that "two-thirds of U.S. [C-Suite executives] believe that the next three years will be more critical for their industries than the last 50 years" (KPMG, 2016, p.4). KPMG predicts that before the end of the first term of the next President of the United States (by 2020), business models will be upended by advances in *technology, speed, and convergence*. KPMG (2016) reports:

These three forces will blur lines between industries and companies, and demand a new way of thinking about business. Much of what will happen is unknown and unknowable. What is impossible today may become mainstream tomorrow (p. 4).

By definition, leaders' wisdom will play a critical role as they discern unpredictable and unprecedented situations—operationally, their ability to utilize reflective integration of value, experience, knowledge and concern for others will determine how this variable benefits leaders in the short term and going forward.

### **Exemplary Consulting-Firm Managing Partner Executives**

C-level, also called the C-suite, is an adjective used to describe high-ranking executive titles within an organization. The C-suite includes individuals with the title of “Chief” in some, but not all organizations. Consulting firms generally do not use the “Chief” title (though some do); rather, they use the term Managing Partner instead of Chief Operating Officer. Titles such as Senior Partner, Junior Partner, and Associate Partner are used to connote ranking reporting order to the Managing Partner, who would be the equivalent to a CEO for that local consultancy office. Officers who hold Partner-level positions are typically considered the most powerful and influential members of a consulting firm’s organization because their actions directly and indirectly affect: (1) the overall direction of the company in which they operate; (2) the lives of their employees and their families; (3) the communities in which they operate; and (4) society in general. “One strikingly consistent finding: Once people reach the [Partner] level, technical and functional expertise matters less than leadership skills and a strong grasp of business fundamentals” (Groysberg, Kelly, & MacDonald, 2011). The discovery of

meaning by these individuals will have a more profound impact on the organization than others.

### **The Role of the Managing Partner Recruited for This Study**

Partners are responsible for sales and leading service offerings, overall leadership for recruiting, and development of marketing materials. For the client work, they are the ultimate authority to approve work and manage the relationship at the senior level.

Duties can be categorized into six areas: (1) Running the business—the day-to-day operations with oversight and appropriate involvement; (2) Servicing clients and generating new business; (3) Collaboration with other partners—including mentoring, coaching, high-level hires, and employment agreements; (4) Governance—getting the right people in the right slots, and knowing when it is time for adjustments or changes; (5) Strategic management—"Big-picture thinking" along the lines of mergers and acquisitions, strategic hires and growth of the firm; and (6) Being the face and voice of the firm—a spokesperson, host, representing the firm at events. The last two being most prevalent.

### **Summary**

Meaning-making has the potential to improve the chances of success of an organization. There are five variables that need further research to determine how leaders may use them to create meaning in an organization—*character, relationships, inspiration, vision, and wisdom*—that have been well-researched and have been shown to contribute to strong organizational leadership and organizational success. While each of these has been well-researched on its own, more research is needed to discover how the behaviors of an exemplar consultancy-firm Managing Partner would use them to create

personal and organizational meaning for themselves and their followers. Moreover, research is needed to discover the degree to which followers perceive these behaviors to be important in creating meaning in their own organizations—particularly in the consultancy industry.

## **CHAPTER III: METHODOLOGY**

This study is part of a thematic mixed-methods case study. Its focus is exemplar consulting-firm Managing Partners in Southern California, and it is conducted in two concurrent parts: Part I—a qualitative in-depth interview with an exemplar Managing Partner; and, Part II—a quantitative self-administered survey among followers of the leader interviewed in Part I. Chapter I introduces the reader to the need for transformational leadership and emergence of meaning from five key variables: *character, relationships, inspiration, vision, and wisdom*. In Chapter II, meaning, leadership and followership are further illuminated through scholarly literature.

Chapter III provides a detailed description of the research design and methods used in this study. It reviews the purpose of the study, and the research questions as described in Chapter I. Continuing the detailed explanation of the study, Chapter III shows how the instruments and schedule were created and tested. It provides a detailed summary of how the data were collected and analyzed, and the sample examined; the study limitations; and the ethical considerations afforded the participants and respondents.

### **Purpose Statement**

The purpose of this mixed-method case study was to identify and describe the behaviors that an exemplary consulting-firm Managing Partner uses to create personal and organizational meaning for themselves and their followers through character, vision, relationships, wisdom and inspiration.



In addition, it was the purpose of this study to determine the degree to which followers perceive that the behaviors related to character, vision, relationships, wisdom and inspiration help to create personal and organizational meaning.

### **Research Questions**

Two research questions were answered by this study: (1) what are the behaviors that exemplary consulting-firm Managing Partners use to create personal and organizational meaning for themselves and their followers through character, relationships, inspiration, vision, and wisdom? (2) To what degree do followers perceive that the behaviors related to character, vision, relationships, wisdom and inspiration help to create personal and organizational meaning?

### **Research Design**

After considering several methods, a mixed-methods case study was viewed as most appropriate for this study. Creswell and Tashakkori (2007) describe mixed-methods research in which an investigator's findings and inferences are drawn from both quantitative and qualitative research methods in a single study. As Roberts (2010) stated, "Qualitative and quantitative approaches in a single study complement each other by providing results with greater breadth and depth. Combining *what* with a possible *why* adds power and richness to your explanation of the data" (p. 145). This study combines both quantitative and qualitative paradigms, where data collection is obtained concurrently. As recommended by Creswell and Plano (2011), in order to collect rich triangulated data, qualitative, quantitative, and artifacts were collected in an exploratory mixed-methods case study. "Mixed methods yield both statistics and stories" (Patton, (2013, p. 15). "Mixed methods provides [sic] enhancement and clarification of data"

MacMillan & Schumacher, 2010, p.396). Triangulation often involves the comparison and integration of data collected from qualitative research with data collected from a quantitative method (Patton, 2013). "It is more useful to do case studies to document [effects] actually experienced by participants rather than rely on a standard measurement scale of problematic relevance and sensitivity" (Patton, 2013, p. 230).

More specifically, a qualitative in-depth interview was conducted with an exemplary consulting-firm Managing Partner. Complementing the in-depth interview, a quantitative survey was conducted with a corresponding group of 13 followers based on their *reporting proximity* to the individual interviewed in the qualitative portion. The qualitative section was conducted with an exemplary leader, who is described in the target population section of this study. The quantitative survey—utilizing a self-administered survey instrument—was completed among 13 followers of the exemplary leader taking part in the qualitative portion of this study. To quote Jane Davidson (in Patton, 2013), "Quantitative evidence is the bones; qualitative evidence is the flesh; and evaluative reasoning is the vital organs. If you are missing any of these you don't have the full evaluative picture" (p. 621).

### **Advantages**

MacMillan & Schumacher (2010) reveal that while mixed-methods research has been used extensively, it is "only recently that it has been given serious consideration by scholars" (p. 396). Tashakkori and Creswell (2007) describe mixed methods as relying on a variety of quantitative and qualitative characteristics, most notably in the questions asked, the sampling methods, the data-collection approaches, the types of data they produce, the types of analyses performed with the data, and the conclusions drawn from

those data. Altogether, mixed-methods case studies have the following specific advantages that entered into the decision to use this approach: (1) provides more comprehensive data—from the perspective of the leader and the followers affected; (2) allows study of the process as well as the outcomes—considering the strategies used and the results of using those strategies; (3) compensates for limitations with use of a single method—offers a stereoscopic view of the leadership/followership dyad; (4) allows investigation of different types of research questions, enabling deeper discussion than structured questioning alone; (5) allows investigation of complex research questions, allowing the investigator to probe specific areas of importance; (6) enhances credibility of findings from a single method, which creates a wider base of credibility and believability in the findings.

### **Population (N)**

"A population is a group of individuals who have the same characteristic. Populations can be small or large" (Creswell, 2012, p. 142). An example of a small population—and the population used in this study—is all U.S. consulting firms based in the State of California. These individuals make up the population of the highest-ranking corporate officers in these firms.

***Figure 4.***

*2016 Population\* of Consulting Firms with Offices in California*

<b>Statistic</b>	<b>Number</b>
Number of Consulting Firms with Offices in California with a Managing Partner	200

\*SOURCE: *The Consulting Bench, (2013). Consulting firms in California.*

## Target Population (*n*)

The *target population (n)* for this study is all consulting-firm Managing Partners in California. "A target population (or the sampling frame) is a group of individuals (or a group of organizations) with some common defining characteristic(s) that the researcher can identify and study" (Creswell, 2012, p. 142). Within this industry are employees identified in this study as either leaders or followers working in the United States. Selected *leaders* were designated as having the title Senior Partner or Managing Partner of a consulting firm with offices in the State of California (see Figure 5).

### **Figure 5.**

*2016 Population\* of Consulting Firms with Offices in Southern California*

<b>Statistic</b>	<b>Number</b>
Number of consulting firms with offices in the Southern California	94
Number of consulting firms with offices in Greater Los Angeles Metro Area	56
Number of consulting firms with offices within 15 miles of Irvine, CA	9
Number of Managing Partners agreeing to be interviewed	1

\*SOURCE: *Vault Research, 2016: most prestigious consulting firms*

## Sample (*n*)

Creswell (2012) explains that "within [the larger] target population, researchers then select a *sample* for study" (p. 142). In this particular study, two independent, non-probability, purposeful, convenience samples were collected—a qualitative interview and a quantitative survey. Creswell (2012) further explains that "in non-probability sampling, the researcher selects individuals because they are available, convenient, and represent some characteristic the investigator seeks to study" (p. 145). Creswell (2012) also explains that "in convenience sampling the researcher selects participants because they are willing and available to be studied" (p. 145). Adding to the selection method

was the judgment of the researcher—making this a purposeful<sup>1</sup> sample. Purposeful sampling is a non-probability sampling method, where the researcher believes they can obtain a representative sample by using sound judgment. The logic and power of purposeful sampling lie in selecting information-rich participants for study in depth (Patton, 1990, p. 169).

To accomplish the goals of this mixed-methods study, *key knowledgeable* were sampled for the qualitative portion of the study "[Key knowledgeable] are individuals who are especially knowledgeable about a topic and are willing to share their knowledge" (Patton, 2013, p. 284). Exemplar leaders in the consultancy industry can meet the criteria of key knowledgeable and provide crucial information in the study of meaning in leadership among exemplar leaders in the their industry—as indicated in the problem statement and research question described in this study.

Both samples were collected simultaneously, using an interview for a consulting firm Managing Partner, and surveys for his followers. Specifically, the qualitative sample of a consulting-firm Managing Partner was selected in accordance with specific selection criteria<sup>2</sup> described in Chapter I. The quantitative sample (Figure 6.) was selected based on their *reporting proximity* to the Managing Partner

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<sup>1</sup> Black, K. (2010) "Business Statistics: Contemporary Decision Making" 6<sup>th</sup> edition, John Wiley & Sons

<sup>2</sup> Qualified Managing Partners is defined as those leaders who are set apart from peers by exhibiting at least five of the following six characteristics: (1) evidence of successful relationships with followers; (2) evidence of leading a successful organizational; (3) have a minimum of five years of experience in the profession; (4) have published, or presented at conferences or association meetings: articles, papers, or other written materials; (5) peer recognition; and (6) membership in professional associations in their field.

interviewed in the qualitative portion of this mixed-methods study. In the qualitative sample ( $n=1$ ), one consulting firm Managing Partner agreed to participate; in the quantitative survey, 13 followers completed the survey ( $n= 13$ ).

**Figure 6.**

*Sample Descriptions*

<b>Statistic</b>	<b>Number</b>
Number of consulting firm Managing Partners in study	1
Number of followers of consulting firm Managing Partners surveyed	13

In the quantitative portion of this study, the leader selected *followers*—described as reporting to, or working closely with, their respective leader. An email developed by the researcher was sent out by the leader to his followers with the survey link and password. The number of *eligible followers* participating for this study was 13 ( $n=13$ ). The individuals in the sample of followers were designated by their respective consulting-firm managing partner.

**Instrumentation**

This section reviews the study from the perspective of the development of the qualitative interview schedule and the quantitative survey instrument. It covers the manner in which all questions were designed and developed, and field-testing and pilot-testing of the interview schedule and survey instrument (pre-test). It covers the validity of the criteria used to qualify participants and respondents. It describes the study's analytic validity and reliability—specifically internal and external reliability of the quantitative research; sample selection, data collection, and data analysis. Both qualitative and quantitative methods used in this study rely on *non-probability sampling*.

"In non-probability sampling, the researcher selects individuals because they are

available, convenient, and represent some characteristic the investigator seeks to study" (Creswell, 2012, p. 145).

### **Qualitative Information**

The qualitative portion of the mixed-methods study is examined in this section. All aspects of the qualitative data set are explained in this section. The quantitative data set follows in a separate section.

**Qualitative Research.** Qualitative research is appropriate when there are no acceptable, valid, and reliable measures (Patton, 2013). The discovery of meaning among exemplar consulting-firm Managing Partners is one such area where no reliable measure exists. All research methods contain shortcomings. Qualitative research is criticized for being too *subjective* due to the fact that the researcher is the instrument. This stems from "researchers' involvement in data collection, data interpretation, and the personal contact with and getting close to the people under study" (Patton, 2013, p. 57). Patton (2012) explains that this bias is found in the questions asked—designed by people, they are open to the developers' biases. In an effort to avoid conflict between subjectivity and objectivity, qualitative "researchers have moved toward describing qualitative research in terms of its *trustworthiness* and *authenticity*" (Patton, 2013, p.58). The researcher needs to establish rapport with the participants, and there are requisite understandings about the participant that must be achieved, including: "the participants' stance, position, feelings, experience and world view" (Patton, 2013, p 58). Patton (2013) introduces us to the concept of *empathetic neutrality*—being aware of the need to communicate interest in the person, and neutrality toward their behaviors and responses.

**Interview Questions.** The qualitative interview schedule (Appendices B, C) was field-tested prior to inclusion in this study. Questions appearing in the interview schedule were developed through collaboration among the 12 thematic researchers taking part in this study, and among the selected faculty at Brandman University's School of Education. Virtual meetings and collaborations were held via the Internet, where pre-test results were discussed and incorporated into the final instrument and schedule.

**Observation Logs.** Validity of the qualitative research was established during the development stage of the interview schedule. Development of the qualitative interview schedule included field-testing a draft version of the interview schedule, which was developed in collaboration with a research consultant and the 12 thematic doctoral students. It involved recruiting an exemplar executive leader who would not be counted in the final tabulations and analyses. Test participants were interviewed, recorded, and witnessed by a third party. Responses to each question were coded and analyzed for their ability to generate responses in line with the direction and purpose of the question. Results from all questions were reported to the entire group involved in the development of the interview schedule. Based on these virtual meetings, a final interview schedule was developed and finalized. The final interview schedule used in this research is found in Appendices A and B.

**Criterion Validity.** Criteria for exemplar consultancy-firm Managing Partners were established by the thematic research team—they are six-fold. To be considered an exemplar leader, the leader must display or demonstrate at least five of the following six criteria: 1) Evidence of successful relationships with stakeholders; 2) Evidence of breaking through conflict to achieve organizational success; 3) Have five or more years



of experience in that profession or field; 4) Written/published or presented at conferences or association meetings; 5) Recognized by their peers; and 6) Membership in associations of groups focused on their field. The location criterion was determined by their logistical proximity—Southern California (see Figure 5). One Managing Partner leader was recruited for this study.

**Content Validity.** Each of the 12 thematic-group students participated in validating the content of the interview schedule. Each student recruited an exemplar leader equivalent to a C-suite executive to participate in a pilot test of the interview schedule. It involved an actual interview with an exemplar C-suite-level executive or an individual of equal leadership stature, such as Managing Partner. Following the interview, the pilot-test subject was interviewed about his or her experience with the interview. Appendices E and F contain the follow-up interview questions. Collaborators coded the responses and reported those results to the group for purposes of discovering whether the answers were in line with the purpose and objective of the questions asked. Additionally, usability issues were explored and resolved. Three usability areas were examined: 1) the length of the interview was determined to be 30 to 60 minutes; 2) directions for administering each question were easily understood by both researcher and participant; and 3) problem areas discovered during the pilot test were addressed and remedied.

**Pilot Interview.** During the course of conducting the pilot interviews, each student was monitored by an expert in qualitative in-depth interviews. Following the pilot-test interview, the expert gave direct feedback to the student conducting the pilot interview. This feedback proved useful in that it enabled the student to make necessary

changes in interviewing style, and it reinforced positive interviewing traits so that the student could emulate those behaviors during the actual data-collection phase.

To obtain feedback from the pilot test, the investigator obtained support from a consultant who is a seasoned qualitative researcher/interviewer with more than 30 years of direct experience in conducting in-depth interviews. Based on observations of the interview, the expert provided feedback to the investigator about the way questions were asked and probed.

### **Reliability**

Consistency is the hallmark of reliability; "a test is said to be reliable if it yields consistent results" (Patten, 2012, p. 73). Examining the verbatim responses given by participants to each of the 12 student interviews revealed a consistency in their responses. The extent to which different interviewers generated similar responses proved the reliability of the interview schedule to discover meaning in participants' leadership.

**Internal Reliability of Data.** Information generated from leaders' assessment qualitative research of their meaning-discovery behaviors triangulates with what followers say, quantitatively, about how the leader affects meaning throughout their organization.

Reliability of the qualitative research in this study was achieved by the selection of an exemplar Managing Partner available to represent consulting firms in Southern California. Transcripts of the Managing Partner's interview were sent to the respondent for their review as to the accuracy of what was transcribed. Confirmation of these transcripts' accuracy bolsters the reliability of the findings that flow from them. Electronic audio recordings and transcripts of the interviews were analyzed for content

along specific code points developed from the nature of the conversation. To achieve this result, MS Excel software was used along with the researcher's interpretational judgment to extract key information from conversations with the selected knowledgeable previously described. To ensure reliability of the interpretation of the transcripts, an independent researcher was asked to recode each transcript. The two interpretations correlated with each other (19 out of 20 code points), and thus confirmed that a consistent proper interpretation was achieved. The idea of consistency as a measure of reliability is supported by Patten (2009). As stated earlier with respect to reliability, "A test is said to be reliable if it yields consistent results" (Patten, 2009, p. 73).

**External Reliability of Data.** Because qualitative research lacks the ability to generalize to other populations, and because it is limited to the individuals who were directly studied, external reliability is not expected. Moreover, qualitative research cites individual participants' verbal responses rather than nominal statistics (Patten, 2012). Because qualitative research yields words and stories, not nominal statistics, the ability to duplicate results with consistency prevents researchers from assigning external reliability.

**Inter-coder Reliability.** Inter-coder (or interrater) reliability is the extent to which the same conclusion is reached by independent coders' evaluation of a characteristic, message, or artifact (Lombard, Snyder-Duch, & Bracken, 2004). This protocol was used to reduce coding errors in this thematic study; another peer-researcher was selected to check the coding and interpretation of transcripts to ensure accuracy of themes from the coding. This was completed by having the peer-researcher double-code 10% of the data obtained by the primary researcher with the peer researcher goals of 90%

agreement in coded data to be considered the best, and 80% agreement on the coded data to be acceptable.

### **Quantitative Information**

"A distinctive feature of quantitative research is that researchers gather data in such a way that the data are easy to quantify, allowing for statistical analysis" (Patten, 2009, p 9). The "goodness" of quantitative research rests in its validity and reliability—did it measure what it is supposed to measure; and can it be replicated by other researchers using identical methods (Patten, 2009)?

**Validity.** A survey instrument is considered valid to the extent that "it measures what it is supposed to measure and performs as it is designed to perform" (Patten, 2009, p. 61). Patten (2009) cautions that validity is not perfect; rather, it is a matter of degree—not whether it is valid, but how valid it is. As it pertains to this study, some traits are elusive and difficult to measure—meaning-making may be one of those traits. In order to make a determination about the validity of the survey instrument, field tests were conducted.

**Content Validity.** "In order to determine the *content validity* of an instrument, researchers make judgments on the appropriateness of its contents" (Patten, 2009, p. 62). Validity of the quantitative research was determined during the pretest of the survey instrument. The quantitative-survey instrument (Appendix D) was field-tested in collaboration among the 12 thematic researchers taking part in this study, and among the selected faculty at Brandman University's School of Education.

**Instrument Pilot.** "Researchers frequently conduct pilot studies. [These] studies are designed to obtain preliminary information on how new treatments and instruments

work" (Patten, 2009, p. 57). In developing appropriate survey questions for all of the five key variables in the study, virtual meetings and collaborations were held via the Internet where pilot-test results were discussed and incorporated into the final instrument. Feedback from the pilot test guided the refinement of the survey instrument. Pilot surveys were conducted by two thematic group researchers who sent the survey instrument to anonymous followers via e-mail, with a timeframe for completion, in organizations closely fitting the exemplary definition. Feedback was also given via email, with all participants continuing to maintain their anonymity. Multiple edits and revisions were submitted, discussed, and ultimately approved for use in the survey instrument.

**Criterion Validity.** Individuals qualifying for the quantitative survey were determined by the Managing Partner taking part in the qualitative portion of this study. The guidelines were communicated to the Managing Partner for purposes of making a determination as to which employees at his company would qualify as followers. These guidelines include that the employee must be an individual directly affected by decisions made by the executive leader—for example, work assignments, performance evaluations, or hiring and firing decisions. Qualifying followers do not need to be physically present at the same geographic location as the executive leader, and can include similarly affected employees at remote locations as well.

**Reliability.** To determine if questions and answers were in line with their intended measurement, pilot-test respondents corresponding to follower criteria were recruited and given a link to the Survey Monkey instrument to complete the pilot survey. Following completion of the pilot survey, the pilot test respondents were re-contacted and

asked about the survey instrument specifically. They were told what the intended purpose of the question was and asked if that is in line with what they thought while taking the survey. Test respondents were again asked to complete the survey. Answers from both survey trials were compared to determine if their answers changed statistically based on the intentions communicated to them by the thematic students conducting the pilot test. Pilot-testing of the quantitative survey instrument revealed that the questions asked, and the instructions as to how to answer the question were clear and understandable in the same way as intended. Results from the pilot test confirmed the instrument's ability to consistently measure what was intended.

### **Data Collection**

Data for the qualitative part of this thematic mixed-methods case study was collected from a 30-minute interview with a highly qualified Managing Partner of a global advertising research consulting firm servicing the automobile industry in Southern California, who agreed to participate. Data for the quantitative part of this thematic mixed-methods case study was collected concurrently via a self-administered instrument emailed to designated qualified followers of the Managing Partner interviewed in the qualitative portion of this mixed-methods case study. The link to the survey was provided to the company, who distributed the request to participate via email to followers designated by the Managing Partner (Appendix D).

**Sample subject selection process.** Following approval from the Institution Review Board (IRB) from Brandman University (Appendix G), a consulting-firm Managing Partner in Southern California was contacted for purposes of taking part in this study. The investigator set up appointments convenient to the Managing Partner.

1. Participants were initially contacted by telephone. The investigator explained the nature of the interview to the Managing Partner, as well as the need to conduct a survey among his followers. In a prepared email, followers of the Managing Partner were given the following information: an explanation of the study; the potential benefits that might emerge from the study; all associated risks involved in their participation; assurance of anonymity of all information gained from the study; and, the opportunity to ask questions about the study and receive answers to those questions from the investigator.
2. The qualified Managing Partner, who indicated a willingness to participate in the study and who was able to make an appointment for a 30-minute interview at their earliest possible convenience, received an email containing the following information ahead of the interview date: (a) Invitation Letter, (b) Research Participant's Bill of Rights (Appendix H), (c) Informed Consent Forms—Appendix A and D (to be signed at the time of the interview), (d) Script and Script Questions for review prior to the interview—Appendices B and C. An informational Recruiting Letter was sent to each potential Managing Partner (Appendix A-1).
3. Followers participating in the quantitative portion of this study were sent an email containing all the attachments listed in #2 and a link to an online survey—Appendix D—via Survey Monkey, and were identified by number only (e.g. Respondent 1, etc.). Followers were given a date by which their completed interview needed to be submitted.

## **Brandman University's Institutional Review Board (BUIRB)**

An application for IRB Approval of Research Protocol to Brandman University's Institutional Review Board (IRB) was submitted in December 2016 along with a revised-method application in March 2017. Central to the application were the purpose of the study, who would participate in the study, which research methods would be used, and how the data would be collected. Potential risks to the participants were described and addressed. The dissertation chair reviewed the interview schedule and survey instrument and provided feedback before being presented to the committee for review and approval. This review included the requisite consent forms (Appendix A: Informed Consent Form). All reviews—in accordance with 10 key criteria—preceded the presentation to Brandman University IRB. Following BUIRB approval (Appendix G), participants were contacted to request their involvement in this study. Once the subjects agreed to participate in the study, their signed agreement and informed-consent forms were collected.

### **Data Analysis**

Data from Part I & II were collected concurrently. Data analysis was compiled and analyzed sequentially. The qualitative data strand among the exemplar Managing partner was analyzed first. This provided a backdrop against which the quantitative data strand among their followers was analyzed and compared.

### **Qualitative Data Analysis**

"Biologically, physiologically, we are not so different from each other; historically, as narratives—we are each of us different" (Sacks, O., 1985, p vii). Qualitative analysis enabled the unique narrative of a Managing Partner to enrich the data, broaden the scope of the discovery of meaning in their leadership, and deepen the



understanding of the relationships with followers and the discovery of the unique meaning narrative in their leadership. Getting to this end-point required that "qualitative analysis transform data into findings" (Patton, 2013, p. 521).

### **MS Excel Data Processing**

During the interview, primary and backup audio-recordings were made, as the researcher made notes of key words, phrases, and body language. Following the interview, the audio recording was transcribed. The transcripts were coded for themes and meanings. To accomplish this, the subsequent transcriptions were uploaded into the data software—MS Excel. As prescribed by the Brandman University Institutional Review Board (BUIRB) requirements, participant identities were kept confidential with each participant identified only as Consulting Executive. Excel spreadsheet analysis occurred concurrently with survey data collection, noting points for potential inclusion in the final report; data were aggregated into a small number of themes.

### **Quantitative Data Analysis**

Quantitative research enabled the measurement of peoples' reaction to a small and insightful set of questions. Unlike qualitative research—which produced words and stories—quantitative research provided a database upon which statistical analysis was mounted (Patton, 2013). "When [quantitative and qualitative] data are collected, an *explanatory design* [exists]" (McMillan & Schumacher, 2010). Within this explanatory design, the foundation upon which these research data were based is called logical positivism—a "rationalistic view of the world holding that humans can be studied like nature, with objective methods, with a single reality" (McMillan & Schumacher, 2010). The findings from these data—with limitations—were projectable to the target population

previously described. As prescribed by the Brandman University Institutional Review Board (BUIRB) requirements, survey respondents were kept confidential, with each survey respondent identified as: Executive-R-1; Executive-R-2; Executive-R-3 ... Executive-R-12.

**How data were analyzed.** Descriptive statistics were used to measure the attitudes of followers related to the importance of the meaning-making behaviors examined in the qualitative part of this study. Followers were analyzed in terms of gender, age, and longevity with the organization and with the leader. Measures of central tendency were the dominant statistical tool—means and percentages, specifically. Averages serve to describe the overall tendency. Reporting is made clearer by the use of percentages, which show the relative strength of a statistic (McMillan & Schumacher, 2010).

**Mixing during data analysis.** Quantitative and qualitative strands were mixed during analysis of the two sets of data. The researcher analyzed the data from the quantitative strand and qualitative strand independently. Then the researcher merged both analyses and interpreted them in a matrix of key findings (Creswell, 2011).

**Mixing during interpretation.** Based on both strands of data—qualitative and quantitative—the researcher drew conclusions and inferences that reflect the information gained from synthesis and comparison of the two strands of data. "All mixed-methods designs should reflect on what was learned by the combination of methods in the final interpretation. For mixed-methods designs that keep the two strands independent, this is the only point in the research process where mixing occurs" (Creswell, 2011, p 67).

## **Limitations**

All studies are impacted by limitations. Such limitations are not necessarily shortcomings, but rather represent the extent to which finds may be interpreted as representing a sub-segment of the whole and not the whole in its entirety. This study is limited by the time it was conducted; the researcher doing the interviewing; internal Managing Partner selection of followers; sample size; sample type; geography; and perceptions of followers

**Time.** This study was conducted during a one-week period in mid-March, 2017; January 20, 2017 marked the inauguration of the 45<sup>th</sup> President of the United States. Perceptions of respondents are an evolving phenomenon, and attitudes of followers are subject to sudden or gradual change. Economic or political changes can impact the consulting industry and its employees at all levels. The timing of this study might necessitate changes in vision and relationships, which might affect the perceptions and responses of those interviewed or surveyed.

**Researcher as Instrument of Study.** The researcher personally conducted interviews with exemplar leaders in the qualitative part of this mixed-methods study. The extent to which inadvertent bias may have been caused by the presence of the researcher is unknown. "Experimenter effect can occur if the characteristics of the investigator, such as clothing, age, gender, race, educational level, affects subjects' responses" (McMillan & Schumacher, 2010, p. 113). While the researcher is an experienced professional qualitative moderator, and has previous experience with the interview schedule, it is unknown to what degree tone and content of the questions may have been interpreted by the participants. In this regard, the researcher is inseparably part of the

qualitative instrument. "Experimenter effects (bias) refer to both deliberate and unintentional influences that the research has on the subjects. This may be reflected in differential treatment of subjects, such as using different voice tone, being more reassuring to one individual, reinforcing different behaviors, [or] displaying different attitudes" (McMillan & Schumacher, 2010, p. 113)

In contrast, the quantitative portion of this mixed-method study was a self-administered survey. Because the researcher was not present either in person, in language, or in reputation, there was no contagion to or connection with the instrument.

**Internal Managing Partner selection of followers.** During the recruiting process, it was necessary for the Managing Partner to select individuals identified as their followers. Since these individuals may tend to select followers whom they believe to be most closely aligned with their vision and values, it is noted that such selection may impose a bias toward more favorable followers, and is therefore a limitation.

**Sample Size.** Two independent samples were used in this study. A qualitative sample consisting of one consulting-firm Managing Partner from Southern California ( $n=1$ ) comprised the first sample. The remaining sample consisted of 13 followers with a direct reporting relationship to the leader in the qualitative study ( $n=13$ ). Sample size directly affects the ability of the researcher to examine the findings at robust confidence levels (McMillan & Schumacher, 2009).

**Sample Type.** In this study purposive, convenience sampling was used. Creswell (2012) explains that "in convenience sampling the researcher selects participants because they are willing and available to be studied. [Because of this sampling approach], the researcher cannot say with confidence that the individuals are

representative of the population" (p. 145). Adding to the sample type limitation was the judgment of the researcher in selecting participants—making this a purposive<sup>3</sup> sample.

**Geography.** The geographical location of the study is Southern California—defined as Orange County, Los Angeles County, San Diego County, and San Mateo County. The extent to which Southern California is different from other geographies is unknown from the data in this study.

**Selection of Followers.** Followers who responded to the survey were invited by the Managing Partner, and therefore their views may be aligned with those of the Managing Partner. This may affect the perspectives that are reported in the survey.

### **Summary**

This mixed-methods case study provides valuable insights into how leaders discover meaning in their leadership, and the impact that leaderships' meaning has on their followers. Chapter III provides a restatement of the problem statement and research questions presented in Chapter I, along with detailed descriptions of five variables outlined in Chapters I and II. This chapter includes a description of the research design and methodology; a description of data-collection and data-analysis processes; an overview of the interviewing techniques used; a description of how participant and respondents were selected; commentary on the validity and reliability of the study; and limitations.

Both qualitative and quantitative research methods were used in this study.

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<sup>3</sup> Black, K. (2010). *Business statistics: Contemporary decision making (6<sup>th</sup> ed.)*. New York: John Wiley & Sons

Qualitative research was used to understand the methods used by an exemplary consulting-firm Managing Partner to discover meaning in their leadership and the effects bestowed upon and felt by their followers. The interview schedule was developed by a team of thematic researchers to illuminate how five variables may or may not have affected meaning. Each researcher used the scripted questions in a pre-test, practice setting. Quantitative research was used to understand how followers attach importance to 30 questions about leadership behaviors.

Chapter IV highlights a reiteration of the purpose, research questions, methodology, data-collection procedures, and population and sample. Chapter IV goes on to present a detailed report of the qualitative and quantitative research findings. Chapter V offers a cursory summary of the purpose statement, research questions, methods, population, and sample. Key findings, implications for action, and recommendations for further research are described in a detailed opinion of the researcher.

## **CHAPTER IV: RESEARCH, DATA COLLECTION, AND FINDINGS**

### **Overview**

This mixed-method case study explored the use of character, relationships, inspiration, vision, and wisdom by an exemplary consulting-firm Managing Partner in creating personal and professional meaning in his organization. This was conducted in two parts. Part I was a qualitative interview; Part II was a quantitative study conducted among 13 followers of the Managing Partner interviewed in Part I. The use of anecdotal quotes and coding of interview responses are used to bring to light the findings from the qualitative study. In the quantitative study, the degree to which followers attached importance to the behaviors related to character, relationships, inspiration, vision, and wisdom—in a manner that creates personal and organizational meaning for them—are reported using statistical measurements. Each of these groups is reported separately in this chapter.

This chapter reiterates the purpose and research questions central to this study. Next, the reader will see a description of the population sample, target sample, and demographic data for each of the two parts previously described. The research methods and data-collection procedures used to collect the data, upon which the findings and subsequent conclusions were drawn, follow next. A narrative of the data from the qualitative study [Part I] is presented in addressing research question one—this includes frequencies of coded mentions and verbatim quotes from the Managing Partner. The quantitative study [Part II] is presented in an analytic narrative with supporting statistical tables. The central focus of this chapter is to present an unbiased analysis of these data. At the end of Chapter IV, there is a summary of the information.

## **Purpose Statement**

The purpose of this mixed-methods case study was to identify and describe the behaviors that an exemplary consulting-firm Managing Partner uses to create personal and organizational meaning for themselves and their followers through *character, relationships, inspiration, vision, and wisdom*.

In addition, it was the purpose of this study to determine the degree of importance followers attach to the behaviors related to *character, relationships, inspiration, vision, and wisdom* to create personal and organizational meaning for themselves.

## **Research Questions**

1. What are the behaviors the exemplary Managing Partner uses to create personal and organizational meaning for himself and his followers through character, relationships, inspiration, vision, and wisdom?
2. To what degree do followers perceive that the behaviors related to character, relationships, inspiration, vision, and wisdom help to create personal and organizational meaning?

## **Research Methods and Data-Collection Procedures**

The research method used in this thematic study was a mixed-method case study that utilized personal interviews and an online survey. A personal interview was conducted by the author of this study using an Interview Schedule (see Appendix C) developed and tested by the thematic team. The survey instrument used in the quantitative study was also developed and tested by the thematic team. The personal interview was conducted with a consulting-firm Managing Partner with offices in Southern California; online surveys were conducted with followers selected by this



Managing Partner in this same organization.

The primary data consisted of qualitative open-ended questions administered via telephone using the *Interview Schedule* previously described. An interview with a Managing Partner was conducted on March 8, 2017, to identify and describe the behaviors he uses to create personal and organizational meaning for himself and his followers. The interview was digitally recorded, transcribed and coded by the researcher/author responsible for this study. The transcription was sent to the Managing Partner for his review, and for approval as to its accuracy in capturing his thoughts and feelings expressed during the interview.

The quantitative data collected for this study was obtained via an online survey (see Appendix C) located on the Survey Monkey website. Taking part in the survey were 13 followers, all of whom were designated by the Managing Partner. An email developed by the researcher was sent out by the Managing Partner to his followers with a link and password to the survey. All data was stored electronically and protected by a password known only to the researcher.

### **Interview Data Collection**

The researcher conducted the interview by telephone, which was the method preferred by the respondent due to his meeting schedule. The researcher use the scripted open-ended Interview Schedule described previously. Prior to the start of the interview, the respondent was emailed the informed consent form (see Appendix A: Informed Consent) and the Research Participant's Bill of Rights (see Appendix G: Bill of Rights). The participant was also provided the audio recording release form to be signed (see Appendix H: Audio Release Form). All release forms were signed and returned prior to

the interview. The qualitative data was collected and stored electronically; it was subsequently transcribed and shown to the respondent for approval (see Appendix C: Qualitative Interview Schedule). Patton (2013) cautions: "No matter what style of interviewing you use and no matter how carefully you word questions, it all comes to naught if you fail to capture the actual words of the person being interviewed" (p 471). During the interview, scripted open-ended questions for each of five domains under investigation were asked, and probed for detail using a series of probes developed and tested by the thematic team. Following respondent approval of the transcript, codes were created to reflect the essence of what the respondent said during the interview. Making sense of what was heard and captured is accomplished by looking for patterns, and "putting together what was said in one place [during the interview] with what was said in another place [during the interview]" (Patton 2013, p. 471).

### **Survey Data Collection**

To ensure cooperation from followers for the quantitative study, the researcher made arrangements with the Managing Partner to deploy the electronic survey from the office of the Managing Partner to his followers. Surveys were conducted using an instrument created and developed and pre-tested by the thematic team and delivered digitally to the followers via the Survey Monkey website (<http://www.surveymonkey.com>). The survey instrument consisted of 30 questions, rated for importance using a six-point semantic differential scale ranging from "not important" to "critically important". Additionally, five demographic questions were solicited. These demographic identifiers were *gender*; *age*; *time with the organization*; and *time with the leader*.

Thirteen followers ( $n=13$ ) were invited to participate, and all followers completed

the survey. At the time of the survey, and prior to answering any of the rating-scale questions, followers were given the following statement:

For purposes of this study and survey, meaning is defined as the result of leaders and followers coming together for the purpose of gathering information from experience and integrating it into a process which creates significance, value and identity within themselves and the organization. Listed below are behaviors that research suggests that leaders use to create personal and organizational meaning.

The behavioral questions focused on followers' perceptions of the importance of each of 30 behaviors affecting *character, relationships, inspiration, vision* and *wisdom* in terms of creating personal and organizational meaning. Descriptive statistics were used to calculate the mean in order to indicate general tendencies in the data, and to address the essence of the second research question raised in this study (Creswell, 2005).

### **Interview Process and Procedures**

Selection of a respondent for the qualitative interview among Managing Partners began with identifying and narrowing the population of top-rated consulting firms in the United States to a smaller list of those with offices in Southern California. The population of 200 top-rated consulting firms with offices in the State of California was reduced to 95 firms with offices in Southern California, then reduced to 56 consulting firms with offices in the Greater Los Angeles metro area, and finally reduced to two nearest to Irvine, California. These were reduced further by determining the six criteria for selection as outlined in the sample population. Each qualified respondent was then contacted by telephone and sent an invitation to become part of this research study. Of the two contacted, one was willing and able to participate during the time frame required

for this study.

Upon his agreement to be interviewed, the respondent was provided (via email) with the following documents: *Research Participants Bill of Rights, the Informed Consent Form, the Audio Release Form*, and a sample of the *Interview Schedule*. Prior to the date of the interview, the researcher reviewed the emailed documents with the respondent and obtained the signatures on the Informed Consent Form and the Audio Recording Release form. The signed forms were examined and the researcher proceeded with the interview on the date and times agreed upon.

The interview guide approach—sometimes called a Moderator’s Guide—was used to collect data for the qualitative interview. Here the topics are selected in advance, and the pace and tone of the interview is “conversational and situational” (McMillan and Schumacher, 2010, p.355). As previously stated, the interview questions were tested and developed by the thematic team, to ensure consistency in the interviews. As is the nature of a conversation, there is some variability with regard to the order and paraphrasing of the questions. With permission from the exemplary leader, he was interviewed and recorded on a digital audio recorder and the recording was subsequently transcribed by the researcher. The researcher then evaluated and coded the data to develop themes from the interview as it related to each variable studied, including character, vision, relationships, wisdom, and inspiration.

The respondent in the qualitative inquiry was questioned with the same scripted questions used by the entire thematic team—probed as necessary—pertaining to each of the five key variables examined in this study: *character, relationships, inspiration, vision, and wisdom*. All questions and probes asked were from the Qualitative Interview

Schedule found in Appendix A. The interviews were recorded digitally, along with notes taken by the researcher at the time of the interview. Within 24 hours of the interview, the audio-recording was transcribed and presented to the respondent for concurrence that they accurately captured the essence of his responses to the questions asked. After the respondent agreed that the written transcript was an accurate account of his intent, the coding process began to uncover possible interpretations that emerged from his commentaries.

At all times during the transcription and coding process, the identity of the respondents was masked to ensure confidentiality by using a unique identifying number—Consultancy Executive 1. Data were formatted for coding using Excel spreadsheets to facilitate efficiency and enable the researcher to *feel the data* as posted. Duplication and revision to code structure were made as they became obvious during the coding process. Codes were then transcribed and compared for duplication and overlapping descriptions. Three steps were followed during the coding process: (1) Nodes/codes were examined from the perspective of the five key variables examined in this study—*character, relationships, inspiration, vision, and wisdom*—and scanned for dominant themes. Specifically, frequencies of repetition were examined and served as a basis for theme development; (2) the node/code frequencies were interpreted as an indication of how strongly the emergent theme was expressing itself; and (3) the researcher used the combination of codes, themes, and frequencies to identify how the exemplary Managing Partner uses *character, relationships, inspiration, vision, and wisdom* to create personal and organizational meaning.

## **Interrater Reliability**

In qualitative studies, the researcher is the instrument. This stems from "researchers' involvement in data collection, data interpretation, and the personal contact with and getting close to the people under study" (Patton, 2013, p. 57). To obtain inter-coder reliability, copies of the digital recording transcript were sent to a member of the thematic team for interrater coding. Because there was only one participant in the qualitative interview, the interrater recoded 100% of the researcher's codes. Results showed that while in some instances different language was used to describe the verbatim response, there exists a 95% validation [similarity] by the peer researcher of all the code points created by the researcher.

## **Population**

A population is defined as "a group of individuals who comprise the same characteristics" (Creswell, 2003, p. 644). The population for this mixed-method case study was *Managing Partners at top-rated management consulting firms with offices in the State of California*. A population, according to McMillan & Schumacher (2010), "is a group of elements or cases, whether individuals, objects, or events, that conform to specific criteria and to which we intend to generalize the results of the research" (p. 129). The top-ranking executive, also known as the Managing Partner, in many consultancies is the individual responsible for every element of the business and its operation in a specific geographic location, and is equivalent to the Chief Executive Officer of that office.

According to *The Consulting Bench* (2013), there are nearly 200 consulting firms in the State of California. The most senior executives at these firms are given titles such as Managing Partner, General Partner, or Senior Partner—the equivalent of the Chief

Executive Officer title for the office location for that company. For purposes of this dissertation the title, Managing Partner is used to connote the most senior-level executive leader.

### **Target Population**

A target population for a study is the entire set of individuals chosen from the overall population for which the study makes inferences based on the data. In this study the target population was narrowed to 94 managing partners in Southern California. This was further narrowed to 56 managing partners within the greater Los Angeles area.

### **Samples**

There were two consulting firms within 15 miles of Irvine, California. Each consulting firm had a managing partner. From this short list, one Managing Partner and thirteen of his followers agreed to participate in this study.

Creswell (2012) explains that "within [the larger] target population, researchers then select a *sample* for study" (p. 142). In this particular study, two independent, non-probability, purposeful, convenience samples were collected—one qualitative, and one quantitative. Creswell (2012) further explains that "in non-probability sampling, the researcher selects individuals because they are available, convenient, and represent some characteristic the investigator seeks to study" (p. 145). Creswell (2012) also explains that "in convenience sampling the researcher selects participants because they are willing and available to be studied" (p. 145). Followers in the quantitative survey agreed to participate in an online survey via Survey Monkey about their perceptions of how important 30 *selected behaviors* are in creating organizational meaning for them.

Six criteria for selection of the sample were established. These were (1) evidence of successful relationships with followers; (2) evidence of leading a successful organization; (3) a minimum of five years of experience in the profession; (4) articles, papers, or materials written, published, or presented at conferences or association meetings; (5) recognition by peers; (6) membership in professional association in his field. These criteria were established by the thematic research team. To be considered an exemplar leader, the individual must display or demonstrate at least five of the six criteria. The managing partner who participated in the study possessed all six of the criteria, and in addition had held several leadership positions prior to his current role—10 years as president of a major advertising agency, 7 years as Chief Marketing Officer (CMO) for two major automobile manufacturers. At the time of this study, he was 63 years old, has had 35 years of professional experience, including his current position in which he has been for 6 years as head of a global advertising research consultancy company. Academically, he has two years of college experience.

At the end of the quantitative survey, *Survey of Leadership Behaviors that Contribute to Personal and Professional Meaning*, followers were asked to provide demographic information to be used only to add clarity to the results of the study. There was 100% return on the surveys. Table 1 (below) reports the demographic information of the 13 followers who completed the survey. The sample of followers were, for the most part male (11 of 13), with Half (7 out of 13) 31 to 50 years of age; the remainder (6 out of 13) were 51 years of age or greater. All had been in the organization 20 years or less with 9 out of 13 having 1 to 10 years longevity. Two-thirds of the 13 followers have



been with the organization more than six years—two-thirds being with the leader for under six years. This is shown in Table 1 below.

Table 1

*Number of Followers in Four Demographic Categories*

Category		N
Gender	Female	2
	Male	11
Age	20-30 years	0
	31-40 years	2
	41-50 years	5
	51-60 years	2
	61+ years	4
Years in Organization	1-10 years	9
	11-20 years	4
	21+ years	0
Time with Current Leader	0-5 years	10
	6-10 years	0
	11+ years	3

*N = 13*

**Presentation and Analysis of Data**

The findings presented in this chapter were derived from a qualitative one-on-one scripted depth interview conducted by telephone with a Managing Partner at a management consulting firm in Southern California and triangulated with quantitative data collected from followers' online responses to the *Survey of Leadership Behaviors That Contribute to Personal and Organizational Meaning*. Triangulation occurred by comparing the data collected from two sources—leader and followers--to current research in the area. The order of presentation of findings in this chapter corresponds to the research questions presented in this study.

## **Results for Research Question 1**

The first research question addressed by the study is “What are the behaviors the Exemplary Managing Partner uses to create personal and organizational meaning for himself and his followers through character, relationships, inspiration, vision, and wisdom? This research question is designed to examine behaviors this Managing Partner used to create meaning within the dimensions represented by the five domains just mentioned. The *theoretical definition* of meaning is a sense of purpose as a fundamental need, which leads to significance and value for self and others (Ambury, 2017; Bennis, 1999; Csikszentmihalyi, 1990; Frankl, 1984; Kouzes & Posner, 2006, 2007; Pearson, 2015; Tredennick, 2004; Varney, 2009; Yeoman, 2014). For the purpose of this study, the *operational definition* of meaning is the result of leaders and followers coming together for the purpose of gathering information from experience and integrating it into a process that creates significance, value, and identity within themselves.

### **Themes Established from the Leader’s Interview**

A composite of all statements made in response to all questions by the respondent during the course of the leader’s interview were reduced to major themes. Themes for each domain are shown in Table 2 in the context of the domain in which they were mentioned. The transcript of the respondent’s verbatim comments to each question was broken into words and phrases that contain the thoughts expressed by the respondent. For each word and phrase a descriptive code was developed by the researcher to capture its essence and meaning. Words and phrases of similar nature were combined to form themes. All comments the leader made during the interview were placed by the researcher into one or more of the five domains of meaning, the major cornerstone of this

study. One-hundred and fifty-two (152) comments were made during the interview

Table 2

*Themes Mentioned by the Managing Partne, by Domain*

Domains	Themes	Codes
Vision	<ul style="list-style-type: none"> <li>a) Engaging for input clarity and direction</li> <li>b) Obtaining buy-in with a flexible agenda</li> <li>c) Being a servant leader</li> </ul>	<ul style="list-style-type: none"> <li>Servant leadership</li> <li>Modeled behavior</li> <li>Conservative aptitude</li> <li>Inquisitive/Accepting of inputs/Information</li> <li>Cooperating / Relationship</li> <li>Flexibility / not ridged</li> <li>Engagement / sharing viewpoints / buy-in</li> <li>Comfort with ambiguity</li> <li>Clarity / Certainty</li> </ul>
Character	<ul style="list-style-type: none"> <li>d) Being honest, trustworthy, and moral</li> <li>e) Being transparent, consistent</li> <li>f) Exuding conviction, courage/bravery</li> </ul>	<ul style="list-style-type: none"> <li>Setting example</li> <li>Acceptance / Accepting consequences</li> <li>Transparency / Consistency</li> <li>Communication</li> <li>Conviction /Courage / Bravery</li> <li>Morality / Validation</li> <li>Believability / Truthfulness / Trustworthiness / Honesty</li> </ul>
Relationships	<ul style="list-style-type: none"> <li>g) Engaging openly, inquisitively with caring/humanizing cooperation</li> </ul>	<ul style="list-style-type: none"> <li>Caring / Humanizing/comfort</li> <li>Inquiry/listening/introspection</li> <li>Confidentiality /Trust</li> <li>Engagement / acceptance</li> <li>Image-building / Openness</li> <li>Compliance / cooperation</li> </ul>
Inspiration	<ul style="list-style-type: none"> <li>h) Being flexible, practical, situation-centric</li> </ul>	<ul style="list-style-type: none"> <li>Situation flexible/ Flexibility / Circumstantial</li> <li>People-oriented/fostering hope/security/understanding</li> <li>Non-creative/practical focus /non-esoteric</li> </ul>
Wisdom	<ul style="list-style-type: none"> <li>i) Being knowledgeable /experienced</li> </ul>	<ul style="list-style-type: none"> <li>Unique, experienced-based, knowledge-based, influential power</li> <li>Not gained from formal education</li> <li>Controversial / transformative / Positive difference</li> <li>Transparency</li> </ul>

Codes created by the researcher in response to commentaries made by the respondent related to Vision produced several dominant overarching themes. Each of the other four domains also provided ample input for assessing the themes expressed in managing partner's thought and feelings—see Table 2. Codes generating a frequency of 58 mentions generate the following themes for Vision: a) Engaging for input clarity and direction; b) Obtaining buy-in with a flexible agenda; and c) Being a servant leader. With 34 coded mentions, Character's dominant themes include: d) Being honest, trustworthy, and moral; e) Being transparent, consistent; and f) Exuding conviction, courage/bravery. The major theme emerging from the 33 coded mentions for Relationships is described as: g) engaging openly, inquisitively with caring/humanizing cooperation. Though less frequently described the 17 coded mentions for Inspiration suggested this: h) being flexible, practical, and situation-centric. Finally, Wisdom, which was described in terms of a problem-solving scenario (11 coded mentions) contained the theme: i) Being knowledgeable and experienced. These themes and their corresponding coded response are shown in Table 2.

The interview began with the following statement and question: *“Here are five leadership behaviors that research suggests are necessary in an exemplary leader. Looking at these, would you agree that these are all important?”* The respondent agreed that all five domains were important in creating personal and organizational meaning.

To further define his response, the respondent was asked if any of the five domains jumped out as being *absolutely essential*. Each of the five domains—to varying degrees—would be considered absolutely important and essential, depending on the situation, according to the respondent. Quoting verbatim, the respondent said:

*“Leadership can’t be one-dimensional.”* The one trait that jumps out as being a bit above the others named was vision. The respondent replied: *“I think you certainly have to provide a vision; and a way for people to achieve that vision.”* When then asked: *“What is it about [vision] that would place it a bit above the others?”* The respondent explained: *“That you know how you want to achieve this [vision], and help people get there, is an absolutely essential part of leadership.”* As the respondent elaborated further, his commentary related to being clear about what you want and leading by example, and establishing a servant leadership role were dominant in his commentaries (11 mentions).

As stated by the respondent: *“To put it into perspective ... if you don’t have vision the other characteristics [that] we’re talking about here have problems. It doesn’t connect. It’s an absolutely essential part of leadership to be utterly clear and consistent in your actions, to have a firm view of where you want to go, and where you want to be, and bring others along with you.”* Northhouse (2009) begins his discourse with the statement: *“Having and sharing a vision is an essential part of being an effective leader”* (p. 1).

## **Vision**

Coincidentally, the next question—and the first to address each of the five domains independently—provided a deeper examination and discussion of *vision*. According to scholars, the theoretical definition of *vision* is a bridge from the present to the future created by a collaborative mindset, adding meaning to the organization, sustaining higher levels of motivation and withstanding challenges (Kouzes & Posner, 2006, 2007; Landsberg, 2003; Mendez-Morse, 1993; Nanus, 1992). Prior to questioning,

the respondent was shown the operational definition for vision. This definition states: “Vision is foresight demonstrated by a compelling outlook of the future shared by leaders and followers who are engaged to create the future state”.

To this end, the respondent was asked to describe the behaviors he used to develop his vision for his organization—specifically, the next question asked: “Are there things that you recall having done to develop vision for yourself and your organization?” While not directly addressing the question about strategy, the respondent replied: “*To put it into perspective on the vision thing ... if you don't have [vision] the other characteristics we're talking about here have problems. It doesn't connect.*” This was probed with: “Were there any unintended outcomes, positive or negative, from the use of that particular strategy?” Adding to his earlier comment, he said: “*If you do have a vision of something, you do have to concede some degree of control, because you can't implement it all [by yourself].*” In getting around to addressing his strategy for developing vision, the respondent was asked about how he ensures “*buy-in*” to his vision. His reply to “*buy-in*” is most telling of his strategy for developing vision: “*You take off the 'belts and braces' of authority and start treating them like human beings. You have conversations with people. I do very much 'manage by walking around'. You can't just sit in your office—you have to get sense of the 'pulse of the place'.*” This reasoning is underscored by Northouse (2009), who talks about generating a shared vision.

The most frequently cited behaviors that describe the respondent's leadership— in effectuating meaning through vision—include his accepting input from his followers, being cooperative and mindful of relationships; being flexible; and engaging followers in the process (21 mentions). Additionally, being comfortable with ambiguity, sharing

viewpoints, and asking for buy-in (9 mentions) round out his thought process on the subject of vision in creating meaning within his organization.

## **Relationships**

The next domain examined and discussed during the interview was *relationships*. According to Kouzes & Posner (2006, 2007, 2009), Reina & Reina (2006), and Ulrich & Ulrich (2010), the theoretical definition of relationships involves the bonds that are established between people through encouragement, compassion, and open communication, which lead to feelings of respect, trust and acceptance. Prior to the start of the interview, the respondent was exposed to an operational definition of relationships, which read: “Relationships are authentic connections between leaders and followers involved in a common purpose through listening, respect, trust, and acknowledgement of one another.”

The interview moved to the next domain—relationships. The respondent was asked the following question: “The second item on the card is establishing relationships. This involves being a good listener and establishing trust among your team members. Are there specific things you have done to develop relationships among the members of your organization?” The highest-ranking behavior described by the respondent involved inquiry, listening, and introspection (13 mentions). Specifically, the respondent talked about his prior experiences, naming one in particular: *“I’ve interviewed all 400 people at [EFG] in San Francisco after joining as CEO. There were employees there 20 years that have never met the CEO before. One of the first things I do is to have a 30-minute interview with everyone that works for me [inquiry]. I ask three questions: What do you like about the place; what do you not like about the place; and, if you were me what*

*would you change?” This listening has an introspection result: “... it puts some humanity on someone that was considered to be in the ‘ivory tower’ of the organization.”*

Scholars Kouzes & Posner (2006a) support this behavior as they point out that “While looking forward may be the quality that differentiates leaders from other credible people, the future does not belong to leaders alone. Leaders are its custodians; their constituents are its occupants. The occupants have a role in shaping where they will live” (p. 178).

The respondent was asked to elaborate as to why he thinks his attempts at establishing relationships with his followers works as well as it did. His response cited the process of engaging his followers and building an image of confidence, trust, and compliance; as well as being open and demonstrating caring and humanizing his leadership role (18 mentions).

### **Character**

The third domain—*character*—was investigated next. Scholars define character, theoretically, as the moral compass by which a person lives their life (Bass & Bass, 2008; Bass & Steidlmeier, 1999; Moore, 2008; Quick & Wright, 2011; Sankar, 2003). As with the previous questions, the respondent was advised of the operational definition of character. Specifically, character is alignment of a value system that promotes ethical thoughts and actions based on principles of concern for others through optimism and integrity while being reliable, transparent, and authentic.

The respondent was asked: “If you take a look at the card, one of the five important leadership behaviors is character and leading with a moral compass. This includes integrity...reliability...authenticity. What kinds of things do you do to



demonstrate your character as the leader of your organization?” This question evoked a wide range of responses. Topping the list of comments by the respondent was these behaviors: believability, truthfulness, trustworthiness, honesty, transparency, morality, consistency, courage and bravery, and his setting an example (21 mentions). Further adding to the formation of character was his acceptance of consequences—not passing the buck (5 mentions). *“I think having a strong moral compass and standing by your word is absolutely critical. If you’re going to have a long career in this business, your word is your bond,”* remarked the respondent. This is described by Reina & Reina (2007), who argue that successful leaders "demonstrate they consider the best interests of others rather than just themselves" (p. 39). The respondent underscored his previous statements when saying: *“... trust has many facets—not the least of which you have to create an environment where people can fail; and you talk about it, and you make sure you don’t repeat it.”* This sustained commitment to followers is underscored by Cole (2016) in his doctoral dissertation on moral attentiveness: “Leaders accomplish organizational purposes through exemplary moral and resilient perceptions and processes, evidencing sustained commitment, positive adaptation, and moral integrity” (p. 18).

### **Inspiration**

The next domain examined and discussed during the interview was *inspiration*. According to Kouzes & Posner (2007), Smith (2015), and Thrash & Elliot (2003), the theoretical definition of inspiration is a source of contagious motivation that resonates from the heart, transcending the ordinary and driving leaders and their followers forward with confidence. Interviewing protocol exposed the respondent to an operational definition of inspiration, which read as follows: “Inspiration is the heartfelt passion and

energy that leaders exude through possibility-thinking, enthusiasm, encouragement, and hope to create relevant, meaningful connections that empower.”

The respondent views inspiration in a rather single-minded, practical manner. Specifically, the most prevalent comment dealt with being flexible, people- and situation-focused, demonstrating clear understanding and concern with current circumstances focused on practical, non-esoteric solutions, while fostering hopefulness and security (15 mentions). The respondent was asked to talk about some of the things he does to inspire his staff to be all they can be. ”In the respondent’s own words: *“I wouldn’t describe my approach as terribly inspirational. Inspiration is something a little bit different; I am more practical in my nature. I don’t tend to come up with lofty suggestions or statements. I am a little bit different in that regard from people in that regard from some of the people I’ve worked for. People will quote me for something that is clear but I don’t say it is something that is inspirational.”* Probing further the respondent was asked as to whether there are some things that seemed to work better than others. His response supports his practical approach to inspiration: *“I am more practical in my nature. I don’t tend to come up with lofty suggestions or statements. It depends on the circumstances. If you’re building the business from a place where everyone is doing well, that is a different environment; [however], if you’re in a turn-around situation, you need to be much more practical. When you go into a company that is down-sized, and people are losing their job, people are looking for hope, and they are looking for something they can actually grab on to.”* Having an eye toward the practicality of situations is mirrored in the work of Kouzes & Posner (2012). Inspiration is not just getting good ideas, but also inspiring followers to persevere during times of difficulty—“Change is the province of leaders. It

is the responsibility of leaders to inspire people to do things differently, to struggle against uncertainty and to persevere” (p.1).

## **Wisdom**

The fifth domain examined was *wisdom*. The theoretical definition of wisdom as defined by peer researchers is the ability to utilize cognitive, affective, and reflective intelligences to discern unpredictable and unprecedented situations with beneficial action (Baltes & Staudinger, 2000; Kekes, 1983; Pfeffer, 2010; Spano, 2013; Sternberg, 1998). Prior to conducting the interview, the respondent was given an operational definition of wisdom to read: “Wisdom is the reflective integration of values, experience, knowledge, and concern for others to accurately interpret and respond to complex, ambiguous, and often unclear situations.”

The interview continued with questions on wisdom. As read to the respondent: “The fifth item on the card is Wisdom. As the card states, responding effectively to unclear, complex issues is called for here. Can you describe a time when your organization faced a very complex or unclear situation?” If yes: “What did you do or what strategies did you put in place to clarify the situation so that progress was possible?” The first strategy was to recognize that intelligence does not equate with wisdom. As the respondent said: “*Here’s the thing: ‘intelligence’ is not ‘wisdom’... [they] were some of the greatest people I’ve ever met, but they lacked wisdom ... they were brilliant, statistically brilliant people, who didn’t have much life experience.*” Seligman (2011) states this sentiment this way: “Even wise individuals are not wise all the time” (p. 181). In addressing the question, his immediate strategy was knowledge, driven by life experiences and influence, couched in transparency of a transformational nature;

overcoming controversy and producing a positive result (10 mentions). He talked about the case of [ABC Company]. He said: *“Many had been with the company for 30+ years. They were producing things, but they didn’t know how the [customers] were using [the product]. Didn’t know how it was impacting business incomes. I needed to bring the research people into the fold, to show them what they were producing, and how we’re approaching it, and this is what clients are looking for. And that got you into a different discussion—not so much an intellectual discussion, not that I’m smarter than anyone else—there was a whole group in the company who thought that was a waste of time. It was controversial to show how it was being used by clients. And very quickly it changed the nature of the relationship we had with the people in the research group and it changed the nature of what we were providing to their clients. And [it] improved their business exponentially.”*

### **Essential Behaviors**

The final subject covered in the interview pertained to the respondent’s perception of what might be the absolutely essential behaviors that an exemplary leader needs to have. The question posed to the respondent was: “Of all the things we have spoken about today—vision, relationships, character, inspiration and wisdom—are there absolute ‘musts!’ that you believe are essential behaviors for an exemplary leader to have?” If yes: “What are those behaviors and why do you believe they are so critical?”

In this self-reflective state, the respondent acknowledged five elements that he believes are essential behaviors or ways of thinking about a problem. One of these can be summarized as “the hard versus soft statistical measures of evaluation, where people and environments are optimized through feedback, delegation and positive reinforcement

of principles related to caring for people and process” (10 mentions). The respondent elaborated on this by saying: “*Business, to great extent, places a lot of importance in the hard statistical [measurements]. I’ve walked away from companies where the numbers are pretty good; but [when] you look at the environment where the people work [it’s not so good]. So you have to have the hard [statistical measurements] as well as the soft side of things [people engagement].*” This is reminiscent of what Crowley (2011) outlines in his work, *Lead from the Heart: Transformational Leadership for the 21st Century*. “By supporting people to achieve their goals, you build a reputation for growing talent” (Crowley, 2011, p.103).

Another self-reflective anecdote was exhibited in his description of emotional intelligence statements (8 mentions) which are the main-stay of Bradberry and Greaves’ (2009) work titled *Emotional Intelligence 2.0*. The respondent talked feely about self-awareness, self-management, social awareness, and relationship management in terms of being non-narcissistic; able to accept criticism; realistic; flexible; self-aware; caring for people; able to provide feedback; understanding human character; and adaptable (8 mentions).

## **Results for Research Question 2**

The second research question addressed by the study is: “To what degree do followers perceive the behaviors related to character, vision, relationships, wisdom and inspiration help to create personal and organizational meaning?” To answer this question followers were asked to indicate the degree of importance they attach to 30 behaviors that are used in creating personal and organizational meaning. For purposes of this survey, meaning was defined prior to the survey start as the result of leaders and followers

coming together for the purpose of gathering information from experience and integrating it into a process that creates significance, value and identity within themselves and the organization. Thirty leadership behaviors examined in this research were developed by the thematic researchers, and covered the five domains examined throughout this study. Followers rated the degree of importance they placed on each behavior by using a six-point scale from “Not Important” to “Critically Important”. Ratings signify followers’ assessment in developing personal and organizational meaning. In addition to the degree of importance, mean ratings are also reported. “The most frequently used statistic is the *Mean*, which is the balance point in a distribution” (Patten, 2012, p. 117).

### **The Five Domains—Overall Rating**

*The Survey of Leadership Behaviors That Contribute to Personal and Organizational Meaning* was given to followers of the Managing Partner and yielded an overall rating for each of the five domains. The scale used to measure each of the behaviors ranged from 1 to 6, with 6 being Critically Important in the organization and “1” being Not Important in the organization. Four of the five domains identified five behaviors related to that domain. The fifth, Wisdom, because of its complexity contained 10 items. The followers responded to 30 items in total. A top 2-box rating is a combination of "very important and critically important" (see Table 3).

All five domains were tightly grouped in terms of their mean ratings. Thirteen followers rated five behaviors within the Character domain. Thus, 65 ratings were made. Of these, only 19, just under 30 percent, were rated “not important,” “marginally important,” or “somewhat important.” Forty-six of the 65 were rated as “important,” “very important, or “critically important.” Overall, the behaviors related to Character

obtained a mean rating of 4.7 on the 6-point scale, placing the character domain in *the important to very important range*, and validating the importance of the character domain (see Table 3)

Table 3

*Followers' Perceived Degree of Importance of Each Meaning-Making Domain*

Meaning Domains	# of Ratings	$\bar{x}$	Top 2 Box											
			(1) Not Important		(2) Marginally Important		(3) Somewhat Important		(4) Important		(5) Very Important		(6) Critically Important	
			n	% for each domain	n	% for each domain	n	% for each domain	n	% for each domain	n	% for each domain	n	% for each domain
Character	65	4.7	2	3.1	1	1.5	8	12.3	11	16.9	22	33.8	21	32.3
Wisdom	130	4.6	8	6.2	5	3.8	6	4.6	33	25.4	43	33.1	35	26.9
Relationships	65	4.5	4	6.2	3	4.6	4	6.2	16	24.6	21	32.3	17	26.2
Vision	65	4.4	2	3.1	3	4.7	8	12.5	14	21.9	23	35.9	14	21.9
Inspiration	65	4.3	4	6.2	3	4.6	5	7.7	18	27.7	25	38.5	10	15.4
TOTAL	390	4.5	20	5.1	15	3.8	32	8.2	92	23.6	134	34.4	97	24.9

While all five domains were tightly group in the *"important to very important range"*, there were some subtle differences among them. Character, with a mean rating of 4.7, topped the list of domains with 66% of followers considering it to be either *"very important (34%) or critically important (32%)"*. Next was Wisdom, with a mean rating of 4.6, it has a top 2-box rating of 60% with followers rating it as *"very important (33%) or critically important (27%)"*. Next, Relationships with a mean rating of 4.5 generated a top 2-box rating of 58% with 32% *indicating it was "very important and 26% indicating it was critically important"*. Vision followed with a mean rating of 4.4 with 58% rating it either *"very important (36%) or critically important (22%)"*. Finally, Inspiration generated a mean core of 4.3, with 54% saying it was *"very (39%) or critically*

*important*"—only 15% rated Inspiration as “*critically important*”—the lowest rated level of critical importance for all five domains.

### **Vision Behaviors**

The Vision domain was rated by followers in terms of five behaviors that contribute to personal and organizational development.

Table 4

*Importance of Vision Behaviors for Developing Meaning in the Organization*

Vision Behaviors	MEAN	(1)	(2)	(3)	(4)	(5)	(6)
		Not Important	Marginally Important	Somewhat Important	Important	Very Important	Critically Important
	n	n	n	n	n	n	n
Communicates the organization’s vision in a way in which team members support it.	5.0	1	0	1	0	5	6
Promotes innovation that aligns with the organization’s vision.	4.7	0	1	1	1	8	2
Demonstrates thinking toward the future through conversations and actions.	4.4	1	0	1	5	3	3
Engages team members in creating a vision for the future.	4.2	0	2	1	4	5	1
Behavior reflects organizational vision when making decisions.	4.1	0	0	5	4	2	2
<b>Overall</b>	<b>4.5</b>	<b>2</b>	<b>3</b>	<b>9</b>	<b>14</b>	<b>23</b>	<b>14</b>

*n* = 13

The top rated behavior with a mean of 5.0 was “*communicates the organization’s vision in a way in which team members support it*”, with 11 out of 13 rating it either “*very or*



*critically important*". Next was the behavior that *"promotes innovation that aligns with the organization's vision"* with a mean rating of 4.7, with 10 out of 13 rating it either "very important (8) or critically important (2)". The next behavior, was below the vision average of 4.5. *"Demonstrates thinking toward the future through conversations and actions"* generated a mean rating of 4.4, with only 6 out of 13 giving it a ""very important (3) or critically important (3)" rating. Also falling below the vision average mean rating [4.5] was *"Engages team members in creating a vision for the future"* with a 4.2 mean rating. Only 6 out of 13 gave it a ""very important (5) or critically important (1)" rating. Finally, having a *"behavior that reflects the organizational vision when making decisions"* was the lowest rated of the five vision behaviors with a mean of 4.1, with only 4 out of 13 giving it a ""very important (2) or critically important (2) rating.

Table 5

*Importance of Vision Behaviors: Means by Age Group*

Vision Behaviors	AGE IN YEARS	
	31-50	51+
Communicates the organization's vision in a way in which team members support it.	4.7	5.3
Behavior reflects organizational vision when making decisions.	3.7	4.5
Promotes innovation that aligns with the organization's vision.	4.1	5.3
Demonstrates thinking toward the future through conversations and actions.	4.0	4.8
Engages team members in creating a vision for the future.	4.1	4.2
Overall	4.1	4.8

*n = 13*

*"Promoting innovation that aligns with the organizations vision"* reflected an interesting dichotomy. While generating an overall mean rating of 4.7, there was an observable difference in the strength of its rating among followers greater than 51 years of age (5.3 mean) than among followers 31 to 50 years of age (4.1)—a difference of 1.2 mean rating points (see Table 5).

### **Character Behaviors**

Followers were asked five questions about behaviors on the survey that related to character and were asked to rate them using a scale ranging from a rating of 1 (not important) to 6 (critically important).

Table 6

#### *Importance of Character Behaviors for Developing Meaning in the Organization*

Character Behaviors	MEAN	(1)	(2)	(3)	(4)	(5)	(6)
		Not Important	Marginally Important	Somewhat Important	Important	Very Important	Critically Important
	n	n	n	n	n	n	n
Behaves in an ethical manner when dealing with others.	5.5	0	0	1	0	4	8
Actively listens when communicating with others.	5.1	0	1	0	2	4	6
Actions with others show that he/she can be trusted.	4.5	1	0	2	2	4	4
Responds to challenging situations with optimism.	4.4	1	0	1	3	7	1
Actions show concern for the well-being of others.	4.2	0	0	4	4	3	2
Overall	4.7	2	1	8	11	22	21

*n = 13*

The character behavior generating the strongest measure of importance was *"Behaves in an ethical manner when dealing with others"*—its mean rating of 5.5 places it in the *very important to critically important zone*, as was the next character behavior *"Actively listens when communicating with others"* (5.1 mean rating). The third numerically ranked behavior was *"actions with others show that he/she can be trusted"*. Its mean rating of 4.5 places it squarely in the *important to very important zone*. In fourth place was *"responds to challenging situations with optimism"*, with a mean rating of 4.4— also in the *important to very important zone*. In fifth position was *"actions show concern for the well-being of others"* with a 4.2 mean rating—1.3 mean points from the first place behavior dealing with ethical behavior (5.5 mean).

Table 7

*Importance of Character Behaviors: Means by Age Group*

Character Behaviors	AGE IN YEARS	
	31-50	51+
Behaves in an ethical manner when dealing with others.	5.1	5.8
Actively listens when communicating with others.	4.7	5.5
Actions with others show that he/she can be trusted.	4.3	4.8
Responds to challenging situations with optimism.	3.9	5.0
Actions show concern for the well-being of others.	3.7	4.8
Overall	4.3	5.2

*N = 13*

Of interest is the finding that older followers (ages greater than 51 years of age) considered some behaviors more critically important than their 31-to-50-year-old counterparts. This was evident for two character behaviors in particular: “*responds to challenging situations with optimism*” (5.0 vs. 3.9)—a 1.1 mean point difference; and “*actions show concern for the well-being of others*” (4.8 vs. 3.7) also a difference of 1.1 mean points (see Table 7).

### Relationship Behaviors

Followers perceived relationships as an integral behavioral aspect of creating meaning in organizations.

Table 8

#### *Importance of Relationship Behaviors for Developing Meaning in the Organization*

Relationship Behaviors	MEAN	(1)	(2)	(3)	(4)	(5)	(6)
		Not Important n	Marginally Important n	Somewhat Important n	Important n	Very Important n	Critically Important n
Creates an environment of trust among leaders and team members in the organization.	5.6	0	0	1	0	2	10
Behaves in a way that shows she/he cares about the team members.	4.8	1	0	0	1	8	3
Communicates in a clear, meaningful way.	4.4	1	0	1	4	5	2
Continuously promotes our team’s moving together as one unit to serve a common purpose.	4.3	1	0	0	6	5	1
Encourages team members to share leadership when performing tasks.	3.4	1	3	2	5	1	1
Overall	4.5	4	3	4	16	21	17

*n = 13*

*“Creates an environment of trust among leaders and team members in the organization”* generated the strongest Relationship behavior with an above average relationship rating of 5.6. More than three-quarters of followers surveyed (10 out of 13) indicated this behaviors was critically important for developing relationship in the organization (see Table 8).

Also above average—albeit a somewhat distant second—with a mean of 4.8 was *“behaves in a way that shows she/he cares about the team members”* with 11 out of 13 indicating it was either very important (8) or critically important (3). Drifting 1.2 mean point lower from the top-rated behavior was *“communicates in a clear, meaningful way”* with a mean behavioral importance rating of 4.4— with 9 out of 13 indicating it was either important (4) or very important (5). *“Continuously promotes our team’s moving together as one unit to serve a common purpose”* is a behavior viewed by followers with mean rating of 4.3; with 11 out of 13 indicated this behavior was either important (6) or very important (5). Finally, lacking in relative importance was the below average relationship behavior *“encourages team members to share leadership when performing tasks”*. Its mean of 3.4 was 1.1 mean point below average, and 2.2 mean points below the first-ranked behavior involving trust (3.4 vs. 5.6). These differences are evident in Table 8.

Table 9

*Importance of Relationship Behaviors: Means by Age Groups*

Relationship Behaviors	AGE IN YEARS	
	31-50	51+
Creates an environment of trust among leaders and team members in the organization.	5.6	5.7
Behaves in a way that shows she/he cares about the team members.	4.6	5.2
Communicates in a clear, meaningful way.	3.9	5.0
Continuously promotes our team's moving together as one unit to serve a common purpose.	4.0	4.7
Encourages team members to share leadership when performing tasks.	3.0	3.8
Overall	4.2	4.9

*N* = 13

The below average mean rating for relationship behaviors generated by “*communicates in a clear, meaningful way*” can be traced to its weakness among younger followers (31 to 50 years of age). As shown in Table 9, these younger followers rated this behavior 1.1 mean points lower than followers more than 51 years of age (3.9 vs. 5.0).

### **Wisdom Behaviors**

The Wisdom domain had 10 items for followers to consider in the survey (see Table 10). The behavior rated highest for importance (5.5 mean) was “*Brings personal knowledge to the table when responding to complex situations within the organization*”.

Twelve out of thirteen followers indicated this leadership behavior was either “*very important or critically important*”, with 9 out of 13 indicating it was *critically important*. Next, with an above average wisdom mean of 5.2, was “*When working with teams and team members, continuously keeps the overall goals of the organization as part of conversations*” with 11 out of 13 rating it either “*very important or critically important*”. Two behaviors—“*Demonstrates compassion toward team members*”, and “*Takes action by doing the “right thing” in a variety of organizational settings*” generated identical means (4.6.mean) and importance ratings, with 8 out of 13 indicating they are either “*very important or critically important*”.

Identical means (4.5 mean) were generated by these four behaviors: *Elevates the quality of decision making by discussing similarities of past situations with team members; Considers past experiences when responding to complex situations within the organization; Shows concern for others; Displays expertise when working in a variety of situations within the organization.*

Below average wisdom mean rating were indicated for *Integrates personal values with organizational values when interacting with team members* (4.1 mean), and *Behavior reflects an understanding of life’s complexities* (3.5 mean).

Table 10

*Importance of Leadership Behaviors for Developing Wisdom in the Organization*

Wisdom Behavior	MEAN	(1)	(2)	(3)	(4)	(5)	(6)
		Not Important	Marginally Important	Somewhat Important	Important	Very Important	Critically Important
	n	n	n	n	n	n	n
Brings personal knowledge to the table when responding to complex situations within the organization.	5.5	0	1	0	0	3	9
When working with teams and team members, continuously keeps the overall goals of the organization as part of conversations.	5.2	0	1	0	1	4	7
Demonstrates compassion toward team members.	4.6	1	0	0	4	5	3
Takes action by doing the “right thing” in a variety of organizational settings.	4.6	1	0	0	4	5	3
Elevates the quality of decision making by discussing similarities of past situations with team members.	4.5	1	0	0	4	6	2
Considers past experiences when responding to complex situations within the organization.	4.5	1	0	0	5	4	3
Shows concern for others.	4.5	0	0	1	6	4	2
Displays expertise when working in a variety of situations within the organization.	4.5	1	0	1	3	6	2
Integrates personal values with organizational values when interacting with team members.	4.1	1	2	0	3	6	1
Behavior reflects an understanding of life’s complexities.	3.5	2	1	4	3	0	3
Overall	4.6	8	5	6	33	43	35
N = 13							



Several behaviors generated average or below average importance ratings due to a lack of importance attribute to them by followers 31 to 50 years of age. Specifically, data shown in Table 11 reveals that older followers (51 years of age or greater) place greater importance on these behaviors than do their younger counterparts (31 to 50 years of age):

- *Demonstrates compassion toward team members* (+1.1 mean points difference)
- *Takes action by doing the “right thing” in a variety of organizational settings* (+1.1)
- *Elevates the quality of decision making by discussing similarities of past situations with team members.*(+1.2)
- *Considers past experiences when responding to complex situations within the organization* (+0.9)
- *Shows concern for others* (+1.2)
- *Displays expertise when working in a variety of situations within the organization* (+1.0)
- *Integrates personal values with organizational values when interacting with team members* (+0.8)
- *Behavior reflects an understanding of life’s complexities* (+0.9)

The presence of this dichotomy was predicted by Dik et al. (2013) who posits that meaning's significance, importance and value each have a personal subjectivity—what is significant to one person may not hold any significance to another. "Meaning is in the eye of the beholder", according to Dik et al. (2013, p. 153).

Table 11

*Importance of Wisdom Behaviors: Means by Age Groups*

Wisdom Behaviors	AGE IN YEARS	
	31-50	51+
Brings personal knowledge to the table when responding to complex situations within the organization.	5.1	5.8
When working with teams and team members, continuously keeps the overall goals of the organization as part of conversations.	5.0	5.5
Demonstrates compassion toward team members.	4.1	5.2
Takes action by doing the “right thing” in a variety of organizational settings.	4.1	5.2
Elevates the quality of decision making by discussing similarities of past situations with team members.	4.0	5.2
Considers past experiences when responding to complex situations within the organization.	4.1	5.0
Shows concern for others.	4.0	5.2
Displays expertise when working in a variety of situations within the organization.	4.0	5.0
Integrates personal values with organizational values when interacting with team members.	3.7	4.5
Behavior reflects an understanding of life’s complexities.	3.1	4.0
Overall	4.1	5.1

$N = 13$

**Inspiration Behaviors**

The fifth domain measured in the *Leadership Behaviors Survey* was *Inspiration*.

The highest-rated inspiration behavior among followers in this survey called for the leader to “*encourage team members to innovate in order to advance the organization’s leading edge*” with a mean rating of 4.7, with 9 out of 13 rating it either “*very important or critically important*” The mean rating for this behavior was 4.7. Followers 51 years of age and greater exhibited a higher importance rating than their 31-to-50-year-old counterparts (5.3 vs. 4.1)—a 1.2 mean point difference.

“*Recognizes achievements of teams and team members*” was rated either *very important* or *critically important* by nearly 54% of followers in this survey. There was no observable difference in mean rating between age groups. The overall mean rating for this leadership behavior was 4.5.

Table 12

*Importance of Inspiration Behaviors for Developing Meaning in the Organization*

Inspiration Behaviors	MEAN	(1)	(2)	(3)	(4)	(5)	(6)
		Not Important	Marginally Important	Somewhat Important	Important	Very Important	Critically Important
		n	n	n	n	n	n
Encourages team members to innovate in order to advance the organization’s leading edge.	4.7	1	0	0	3	6	3
Recognizes achievements of teams and team members.	4.5	0	1	2	3	3	4
Works with team members in a way that generates enthusiasm within teams.	4.5	0	1	0	5	6	1
Engages in activities that build confidence among team members.	4.3	1	0	1	5	4	2
Empowers team members to take reasonable risks when problem solving.	3.7	2	1	2	2	6	0
Overall	4.3	4	3	5	18	25	10

*N = 13*

Also generating a 4.5 mean rating was the leadership behavior associated with “works with team members in a way that generates enthusiasm within teams”. Of note is that only 8% rated it critically important. No directional age differences were observed.

“Engages in activities that build confidence among team members” generated a mean rating of 4.3 among followers overall; however, its importance was rated less important among followers 31 to 50 years of age (3.7). Older followers rated this behavior in the *critically important zone*, with a mean rating of 5.0—a 1.3 mean point difference.

Table 13

*Importance of Wisdom Behaviors: Means by Age Groups*

Inspiration Behaviors	AGE IN YEARS	
	31-50	51+
Encourages team members to innovate in order to advance the organization’s leading edge.	4.1	5.3
Engages in activities that build confidence among team members.	3.7	5.0
Works with team members in a way that generates enthusiasm within teams.	4.1	4.8
Recognizes achievements of teams and team members.	4.6	4.5
Empowers team members to take reasonable risks when problem solving.	3.4	4.0
Overall	4.0	4.7

*N = 13*

The mean rating for the behavior “Encourages team members to innovate in order to advance the organization’s leading edge” was 4.7 (see Table 12). However, Table 13 shows followers 51 years of age and greater indicate a higher importance ratings for this behavior than their 31-to-50-year-old counterparts (5.3 vs. 4.1)—a 1.2 mean point

difference. Likewise, older followers were more likely to rate “*Engages in activities that build confidence among team members*” of higher importance than do their younger counterparts (5.0 vs. 3.7—a difference of 1.3 mean points).

### ***Triangulation of Data***

Triangulation of these two data sources (Table 14) reveals that the Managing Partner and his followers agree, in varying degrees, that each of the five domains is a contributor to leadership and the underlying benefit of meaning-making. In the opening questions of the Managing Partner’s interview the respondent agreed that all five domains were important in creating personal and organizational meaning. To further define his response, the respondent was asked if any of the five domains were absolutely essential. Each of the five domains—to varying degrees—would be considered absolutely important and essential, depending on the situation, according to the respondent. However, the respondent said: “*Leadership can’t be one-dimensional.*” The one trait that jumps out as being a bit above the others named was *vision*.

Table 14

### ***Triangulation of Qualitative Research (Managing Partner) and Quantitative Research (Followers)***

<i>Domain</i>	Followers	Managing Partner	
	Mean Ratings	Frequency of Mentions During the Interview	% of all Mentions
Vision	4.5	43	35%
Character	4.7	31	25%
Relationships	4.5	21	17%
Inspiration	4.3	17	14%
Wisdom	4.6	11	9%
Total	4.5	123	100%

More importantly, while all of these domains are viewed by the leader as important in making meaning, some may be used more often depending on the situation.

When read the statement: Here are five leadership behaviors that research suggests are necessary in an exemplary leader. Looking at these, would you agree that these are all important, the Leader replied: “*Absolutely. In varying degree depending on the situation. Leadership can’t be one dimensional.*”

### **Leader and Follower Views of Domain Importance**

In keeping with the varying degrees mentioned by the Managing Partner, Vision and Character seem to be the most frequently mentioned domains by the Partner with 60% of the discussion revolving around these two domains and very little attention paid to Wisdom. Followers on the other hand, rated all five domains very close, in the *important to very important range* (mean rating of 4.3 to 4.7).

### **Age Difference Reflected in Ratings among Followers**

For 18 out of 30 behaviors across all domains rated by followers, there were differences in the mean ratings generated by followers in different age groups. The presence of this dichotomy was predicted by Dik et al. (2013) who posits that meaning's significance, importance, and value each have a personal subjectivity—what is significant to one person may not hold any significance to another. Other scholars also indicate age and behavioral differences between leaders and followers (Belal, Kaifi, Bahaudin & Mujtaba, 2010; Kotur & Anbazhagan, 2014; Oshagbemi, 2004).

Table 15

*Major Differences in Behavioral Importance by Age Group*

Domain	Behavior	MEAN	AGE IN YEARS		± Dif
			31-50	51+	
Inspiration	Engages in activities that build confidence among team members.	4.3	3.7	5.0	1.3
Inspiration	Encourages team members to innovate in order to advance the organization's leading edge.	4.7	4.1	5.3	1.2
Vision	Promotes innovation that aligns with the organization's vision.	4.8	4.1	5.3	1.2
Wisdom	Elevates the quality of decision making by discussing similarities of past situations with team members.	4.5	4.0	5.2	1.2
Wisdom	Shows concern for others.	4.5	4.0	5.2	1.2
Wisdom	Demonstrates compassion toward team members.	4.6	4.1	5.2	1.1
Wisdom	Takes action by doing the "right thing" in a variety of organizational settings.	4.6	4.1	5.2	1.1
Character	Responds to challenging situations with optimism.	4.4	3.9	5.0	1.1
Relationships	Communicates in a clear, meaningful way.	4.4	3.9	5.0	1.1
Character	Actions show concern for the well-being of others.	4.2	3.7	4.8	1.1
Wisdom	Displays expertise when working in a variety of situations within the organization.	4.5	4.0	5.0	1.0
Wisdom	Considers past experiences when responding to complex situations within the organization.	4.5	4.1	5.0	0.9
Wisdom	Behavior reflects an understanding of life's complexities.	3.5	3.1	4.0	0.9
Vision	Behavior reflects organizational vision when making decisions.	5.2	3.7	4.5	0.8
Character	Actively listens when communicating with others.	5.1	4.7	5.5	0.8
Vision	Demonstrates thinking toward the future through conversations and actions.	4.6	4.0	4.8	0.8
Wisdom	Integrates personal values with organizational values when interacting with team members.	4.1	3.7	4.5	0.8
Relationships	Encourages team members to share leadership when performing tasks.	3.4	3.0	3.8	0.8

As shown in Table 15, older followers (51 years of age or greater) rate 18 out of 30 leadership behaviors higher than their younger follower counterparts (31 to 50 years of age) by a margin of 0.8 mean points or greater.

### Major Findings of the Study

The two research questions addressed by this study, and described throughout, focus on critical behaviors of the exemplary leader in discovering meaning in his

leadership; and the degree to which his followers attach importance to those behaviors.

The research data from an in-depth interview of a qualified exemplar managing partner in a consulting firm in Southern California, and 13 of his followers, provide ample evidence for the findings reported herein.

### **Major Finding 1—Vision**

The data gathered from the managing partner's interview show a strong reliance on vision, in general, as a prominent domain in his leadership. The Managing Partner spoke of vision as the most important of all the domains, emphasizing that it produced clarity and certainty, and offered the opportunity to model his behavior for his followers, while helping them to achieve his vision—a cumulative 60% of his comments were about this meaning-making domain.

### **Major Finding 2—Vision**

A shared vision was specifically mentioned on several occasions when the managing partner spoke of a particular domain that would stand above the others. The Managing Partner characterized the vision domain as the development of a shared vision resulting from his accepting inputs from followers, cooperating in those relationships, being flexible and encouraging engagement—a cumulative 49% of his comments on this particular subject.

### **Major Finding 3—Character**

Data collected from the managing partner reflect his opinions of and attitudes toward character as one domain that comprises truth, trust, believability, and acceptance of consequences. The Managing Partner evoked the character domain expanding his thoughts to include setting an example for followers, a cumulative 50% of comments



when speaking of this meaning-making domain.

#### **Major Finding 4—Relationships**

Data collected from the managing partner with regard to relationships focused on his behavior of soliciting input from followers, listening to them, and thinking about the implications of their comments. The Managing Partner’s characterization of the relationship domain was evoked in terms of his behaviors of inquiry, listening, and introspection—a cumulative 39% of his comments on relationships was couched in these terms.

#### **Major Finding 5—Inspiration**

Data derived from the conversation with the managing partner on the subject of inspiration centered on the domain as being two-dimensional in that it is born out of circumstances by which we are inspired and toward outcomes to which we are inspired. The Managing Partner exhibited a single-minded characterization of the inspiration domain as circumstantial in its occurrence and “situation-flexible” in its achievement. One should seek inspiration under the circumstances in which they are present, and about the situation they are trying to resolve—an evocation that captured 47% of his comments on this subject.

#### **Major Finding 6—Wisdom**

On the subject of wisdom the managing partner indicated he gained it from life-long experiences and not necessarily from learned intelligence. The Managing Partner recognized the age-related nature of wisdom, expressing his beliefs in terms of the wisdom domain being a unique, experience-based, knowledge-based, influential power—a position that encompassed 45% of his thoughts and feelings about this meaning-making

domain.

### **Major Finding 7—Followers Overall Rating of all Five Domains**

Followers' indicated how important each of the five domains were to them individually in the quantitative survey. Each of the five domains was tightly grouped within a half-mean point of each other (4.7 to 4.3)—all were rated below or just below the “*very important*” threshold. None of the domains was found to generate a mean rating at the “*critically important*” or “*very important*” threshold. In analyzing why the means were not stronger, it was discovered that a dichotomy in opinions existed between older followers (51 years or greater) and younger followers (31 to 50 years of age), where the mean ratings generated by younger followers were numerically less important for each of the 30 behaviors studied. The impact of this dichotomy was observed in subsequent mean calculations for wisdom, character, and inspiration

Followers of the consulting-firm Managing Partner indicate that all five domains are “*important to very important*”. Based on their mean ratings each of the five domains generated a mean of between 4.3 and 4.7.

1. Character generated a mean of 4.7 points
2. Wisdom was given a 4.6 mean rating
3. Vision and Relationship were given identical overall mean ratings of 4.5
4. Inspiration generated a mean rating of 4.3 overall.

### **Major Finding 8—Followers Age Impact**

The data uncovered differences in the importance followers attach to 18 out of 30 domain behaviors that corresponded with the age of the follower. The age of the follower can impact how important some leadership behaviors are perceived. None of the

domains were found to generate a mean rating at or above the “critically important” or the “very important” threshold. In analyzing why the means were not stronger, it was discovered that a dichotomy in opinions existed between older followers (51 years or greater) and younger followers (31 to 50 years of age), where the mean ratings generated by younger followers were numerically less important for 18 out of the 30 behaviors studied.

### **Summary**

Chapter IV presented the study purpose and method and presented the qualitative and quantitative data in answering the two primary research questions of this study. The qualitative data were based on an interview with a consultancy Managing Partner in Southern California. Data covering the five domains of meaning-making were coded for specific themes and cross-checked with an independent, professional qualitative researcher’s duplicated coding. The quantitative data were tabulated from 13 followers of the Managing Partner and cross-tabbed by age and in total. Triangulation of both data sources revealed several key findings. The following chapter, Chapter V, summarizes these findings, and explores unexpected findings, conclusions, implications for action, recommendations for further research, and closing remarks and reflections by the researcher.

## **CHAPTER V: SUMMARY, CONCLUSIONS, IMPLICATIONS, AND RECOMMENDATIONS**

This final chapter presents a summary of the study, which includes a restatement of the purpose, research questions, methodology, population, and sample. The chapter details key findings and conclusions based on the research questions. Additionally, Chapter V outlines the implications for action and recommendations for further research. The chapter concludes with the researcher's personal reflections and comments.

### **Methodology Review**

#### **Purpose Statement**

The purpose of this mixed-method case study was to identify and describe the behaviors that an exemplary consulting-firm Managing Partner uses to create personal and organizational meaning for himself and his followers through character, vision, relationships, wisdom and inspiration.

In addition, it was the purpose of this study to determine the degree of importance to which followers perceive that the behaviors related to character, vision, relationships, wisdom and inspiration help to create personal and organizational meaning.

#### **Research Questions**

Two research questions were answered by this study: (1) what are the behaviors that an exemplary consulting-firm Managing Partner uses to create personal and organizational meaning for him and his followers through character, relationships, inspiration, vision, and wisdom? (2) To what degree do followers perceive the behaviors related to character, vision, relationships, wisdom and inspiration help to create personal and organizational meaning?

This study is part of a thematic mixed-methods case study. Its focus is exemplar Managing Partners in consulting firms in Southern California, and is conducted in two concurrent parts: Part I—a qualitative in-depth interview with an exemplar Managing Partner; and, Part II—a quantitative self-administered online survey among followers of the leader interviewed in Part I.

More specifically, a single qualitative in-depth interview was conducted with an exemplary Managing Partner of a consulting firm in Southern California.

Complementing the in-depth interview was a quantitative online survey conducted among a corresponding group of 13 followers based on their *reporting proximity* to the Managing Partner just mentioned in the qualitative portion.

### **Population and Sample**

The population for this mixed-method case study was exemplar managing partners in consulting firms in Southern California. This was a single case study with a sample of one. The participant met the criteria established by the thematic research team, defining exemplar leaders as meeting at least five of these six criteria: (1) evidence of successful relationships with followers; (2) evidence of leading a successful organization; (3) a minimum of five years of experience in the profession; (4) published or presented at conferences or association meetings: articles, papers, or other written materials; (5) peer recognition; and (6) membership in professional associations in their field.

### **Findings of the Study**

The two research questions addressed by this study, and described throughout, focus on critical behaviors of the exemplary leader in discovering meaning in his leadership; and the degree to which his followers attach importance to those behaviors.

The research data from an in-depth interview of a qualified exemplar managing partner in a consulting firm in Southern California, and 13 of his followers, provide ample evidence for the findings reported herein.

Referencing the findings from Chapter IV, the researcher compiled the most salient remarks of the Managing Partner about each of the five domains. There were two major findings for vision, and one key finding each for character, relationships, inspiration, and wisdom. Findings are reported in the order in which they were collected.

### **Major Finding 1—Vision**

*The data gathered from the managing partner's interview show a strong reliance on vision, in general, as a prominent domain in his leadership. The Managing Partner spoke of vision as the most important of all the domains, emphasizing that it produced clarity and certainty, and offered the opportunity to model his behavior for his followers, while helping them to achieve his vision—a cumulative 60% of his comments were about this meaning-making domain.*

### **Major Finding 2—Vision**

*A shared vision was specifically mentioned on several occasions when the managing partner spoke of a particular domain that would stand above the others. The Managing Partner characterized the vision domain as the development of a *shared vision* resulting from his accepting inputs from followers, cooperating in those relationships, being flexible and encouraging engagement—a cumulative 49% of his comments on this particular subject.*

### **Major Finding 3—Character**

*Data collected from the managing partner reflect his opinions of and attitudes*

*toward character as one domain that comprises truth, trust, believability, and acceptance of consequences.* The Managing Partner evoked the character domain expanding his thoughts to include setting an example for followers, a cumulative 50% of comments when speaking of this meaning-making domain.

#### **Major Finding 4—Relationships**

*Data collected from the managing partner with regard to relationships focused on his behavior of soliciting input from followers, listening to them, and thinking about the implications of their comments.* The Managing Partner’s characterization of the relationship domain was evoked in terms of his behaviors of inquiry, listening, and introspection—a cumulative 39% of his comments on relationships was couched in these terms.

#### **Major Finding 5—Inspiration**

*Data derived from the conversation with the managing partner on the subject of inspiration centered on the domain as being two-dimensional in that it is born out of circumstances by which we are inspired and toward outcomes to which we are inspired.* The Managing Partner exhibited a single-minded characterization of the inspiration domain as circumstantial in its occurrence and “situation-flexible” in its achievement. One should seek inspiration under the circumstances in which they are present, and about the situation they are trying to resolve—an evocation that captured 47% of his comments on this subject.

#### **Major Finding 6—Wisdom**

*On the subject of wisdom, the managing partner indicated he gained it from life-long experiences and not necessarily from formal education.*

The Managing Partner recognized the age-related nature of wisdom, expressing his beliefs in terms of the wisdom domain being a unique, experience-based, knowledge-based, influential power—a position that encompassed 45% of his thoughts and feelings about this meaning-making domain.

### **Major Finding 7—Followers Overall Rating of all Five Domains**

Followers were expressive in their indications of the how important each of the five domains were to them individually in the quantitative survey. Each of the five domains was tightly grouped within a half-mean point of each other (4.7 to 4.3)—all were rated below or just below the “*very important*” threshold. None of the domains was found to generate a mean rating at the “*critically important*” or “*very important*” threshold. In analyzing why the means were not stronger, it was discovered that a dichotomy in opinions existed between older followers (51 years or greater) and younger followers (31 to 50 years of age), where the mean ratings generated by younger followers were numerically less important for each of the 30 behaviors studied. The impact of this dichotomy was observed in subsequent mean calculations for wisdom, character, and inspiration

*Followers of the consulting-firm Managing Partner concur that all of the five domain are “important to very important”.* Based on their mean ratings each of the five domains generated a mean of between 4.3 and 4.7.

1. Character generated a mean of 4.7 points
2. Wisdom was given a 4.6 mean. Rating
3. Vision and Relationship were given identical overall mean ratings of 4.5
4. Inspiration generated a mean rating of 4.3 overall.



## **Major Finding 8—Followers Age Impact**

*The data uncovered differences in the importance followers attach to 18 out of 30 domain behaviors that corresponded with the age of the follower.* The age of the follower can impact how important some leadership behaviors are perceived. None of the domains were found to generate a mean rating at or above the “critically important” or “very important” threshold. In analyzing why the means were not stronger, it was discovered that a dichotomy in opinions existed between older followers (51 years or greater) and younger followers (31 to 50 years of age), where the mean ratings generated by younger followers were numerically less important for 18 out of the 30 behaviors studied.

### **Unexpected Findings**

An examination of these data by age groupings produced unexpected findings. Specifically, age does seem to have a bearing on followers’ perceptions (mean ratings) of the importance of the domain behaviors in producing personal and organizational meaning. As reported in Chapter IV, there were differences in the mean ratings given 18 of the 30 behaviors across all the domains examined in this study. These differences were traceable to the age of the follower, indicating the importance they attach to the behavior. Older followers rated virtually every behavior numerically higher—some having stronger difference than others by a margin of 0.8 to 1.3 mean points.

Wisdom was the domain most affected by this age-related bias with older followers rating 8 out of 10 behaviors between 0.8 and 1.3 mean points higher. And while it may not be surprising to learn that age has a bearing on the values people have in their lives, it was surprising to learn that this can affect the importance certain behaviors

have in an organization when developing meaning for all employees. The “*One Size Fits All*” approach to meaning-making—no matter how well-intended—is challenged when certain specific behaviors are considered less important than others by followers of different ages.

Put another way, if younger followers see certain behaviors as substantially less important than their older counterparts do, could there not be a less beneficial effect in creating meaning for a sizeable portion of the organization when using behaviors that are dichotomous in their importance?

### **Conclusions**

The researcher drew conclusions that address each of the two research questions based on the major findings highlighted by the data. These conclusions are presented according to the order established by the research questions they address.

#### **Conclusion 1**

Leaders who are interested in creating meaning for themselves and their organizations should make collaborative development of the vision a strong priority.

Support for this conclusion is based on the following evidence:

1. This was the domain that the leader mentioned as one that stands out above the others.
2. When speaking of vision, the leader talked freely about establishing clarity and certainty going forward, and engaging and accepting inputs from his followers in a cooperative relationship.

When followers understand the purpose of what they do, and the far-reaching effects it can produce, and when leaders infuse their followers with a deep sense of self-

fulfillment, organizations are in a position to flourish (Mautz, 2015; Kouzes & Posner, 2006; Ulrich & Ulrich 2010). Sinek (2011) tells us that leaders who give their followers a reason *why* they should follow stand a better chance of achieving their goals and create a more meaningful place to work. Vision is described as a bridge from the present to the future created by a collaborative mindset, adding meaning to the organization, sustaining higher levels of motivation, and withstanding challenges (Kouzes & Posner, 2006, 2007; Landsberg, 2003; Mendez-Morse, 1993; Nanus, 1992). Finally, another way to give followers support is to communicate a vision that inspires passion in them and action from them. Doing this requires that followers understand why a leader's vision is achievable and in the best interest of the organization—and by extension the followers individually (Sinek, 2009; Ulrich & Ulrich, 2010). Sinek (2011) emphasizes the importance of explaining the "Why" of a vision and is a statement in support of organizational purpose. Exemplary transformational leaders see vision as a motivating force, drawing energy from the values expressed within (Dik et al., 2013).

## **Conclusion 2**

Leaders who want to build strong relationship with their followers should engage their followers in dialogue that encompasses mutual needs and wants. Crowley illustrates in his 2011 book *Lead from the Heart* that a new 21st-century leadership model—one that places emphasis on making people feel appreciated and needed—has to replace the archaic approach that ignores people's desire for self-actualization and personal esteem as cited in Maslow (1943). "By supporting people to achieve their goals, you build a reputation for growing talent" (Crowley, 2011, p.103). The Managing Partner espoused his dedication to his people and their growth and achievements and related these to his

own achievements and the achievement of the corporate vision. Clearly vision and relationships are interrelated.

1. The evidence for this conclusion comes from the respondent's admission that *"...the human part of things is incredibly important—business, to a great extent, places a lot of importance of the hard statistical [measurements]. I've walked away from companies where the numbers are pretty good; but you look at the environment where the people work and you have people disengaged from their environment"* (48% of mentions on the subject of relationships)
2. The literature reveals that 70 percent of American workers are apathetic about their jobs, either "not engaged" or "actively disengaged" (Ford, 2015).
3. Followers rated the relationship behaviors as important to creating personal and organizational meaning.

### **Conclusion 3**

Leaders are more likely to create real meaning for their people and their organization if they exhibit a strong moral compass and an ethical footprint in their words and actions.

Character is the foundation upon which all other leadership characteristics depend—it is the root of trust (Reina & Reina, 2006, 2007; Kouzes & Posner, 2006). The Managing Partner described his strategy as containing elements of a strong moral compass and his ability to establish an image of trustworthiness.

1. Evidence for the respondent's character comes from personal statements regarding his strategy as containing elements of a strong

- moral compass (accepting consequences—19% of mentions), believability, trustworthiness and truthfulness, and honesty (19%)
2. Other character-related comments include: transparency, communication, consistency, conviction and courage/bravery (8% each, respectively).

#### **Conclusion 4**

Leaders who are attempting to inspire their followers should take into account the unique circumstance in which they find themselves—circumstances and situations need to be addressed for inspiration to be meaningful.

The respondent drew a distinction about cultivating inspiration depending on the financial/economic circumstance of the business. *“During times of lay-offs and fear of job loss, followers have a different mindset than those in a business where things are growing and are becoming more profitable.”* Inspiration enables exemplar leaders to know what excites, motivates, and brings meaning to the lives of their followers and constituents—this is a precursor to purpose and significance in work and within organizations (Hacker & Roberts, 2003; Mautz, 2015; Raelin, 2006).

1. Evidence for this comes from his declarations that flexibility and awareness of circumstances and situations is essential (47% of all mentions). *“Because if you’re building the business from a place where everyone is doing well, that is a different environment than when you go into a company that is down-sized, and people are losing their job—people are looking for hope, and they are looking for something they can actually grab on to”.*

## **Conclusion 5**

Leaders must use the wisdom earned through a variety of life experiences to achieve success in creating meaning. While there are many individuals who are brilliant in their occupations and produce incredible outcomes, their lifetime may be too short to have accumulated enough experience (good and bad) to piece together what actions to take in the face of uncertainty. “In the case of [ABC Company] I worked with brilliant, statistically brilliant people, who didn’t have much life experience. Many had been with the company for 30+ years.”

1. Evidence for this conclusion come from comments found in the coded statements: “unique, experienced-based, knowledge-based, influential power”—45% of mentions on the subject of wisdom.
2. More evidence is ancillary to the Managing Partner’s commentary and comes from the statistical analysis of followers, where it is noted that wisdom loses importance in 18 out of 30 behaviors among those younger followers 31-to-50-year-old bracket, compared with followers 51 years of age or greater.

### **Implications for Action**

These implications for action are presented to address the conclusions identified in the previous section. The recommendations are suggestions by the researcher detailing the implications for action.

All five domains need to be considered as organizations design programs for employees, engage workforce participants, conduct leadership training, and engineer

employee perks, benefits and work environments, as followers value equally all five domains for meaning making.

### **Implication for Action 1: Overall Behaviors**

Human Resources Departments in organization need to analyze the needs and priorities that exist within the generational groups that make up their workforce to determine what is most likely to be an advantage in creating meaning in the workplace. The idea of a *One Size Fits All* style of meaning-making may be a myth according to the study's finding that the age of followers impacts the level of importance they assign to the leader's behaviors in creating meaning. It is imperative that professional development help leaders develop a strategy of customizing their leadership behaviors to the audience with whom they are engaging. Given that older followers in this study (51 years of age or greater) assign greater importance to many of the behavior-related activities in each of the five domains than do their 31-to-50-year-old counterparts, it is reasonable to infer that what will work for one group of followers may not work for another. Exploring the degree of importance in leadership behaviors may help the leader to differentiate practices for better engagement.

### **Implication for Action 2: Vision**

Leaders at all levels of the organization would be well served to achieve buy-in to their vision by reaching out to lower-level employees (grassroots individuals) who can enlighten the leader, while also being engaged .

The development of a shared vision requires buy-in at all levels of the corporation. Leaders should be encouraged to have and maintain an open-door policy that encourages all levels of the organization to speak freely about the challenges they face without fear

of reprisal. In this way, through a free-flowing discourse, a clear, attainable, and sustainable vision can be developed and implemented. Vision is the preeminent focus of a consulting business—it is the reason why clients engage a consultancy in the first place—an open discourse should not be relegated to last place.

### **Implication for Action 3: Relationships**

University programs designed to prepare leaders for organizations, such as MBA programs, management credential programs, and doctoral programs in organizational leadership, should incorporate meaning making strategies into their course work. For example, building solid, trusting relationships must be a high priority for emerging leaders to achieve the greatest success in developing the leaders' vision and making meaning for themselves and their people. Crowley illustrates in his 2011 book *Lead from the Heart* that a new 21st-century leadership model—one that places emphasis on making people feel appreciated and needed—has to replace the archaic approach that ignores people's desire for self-actualization and personal esteem as cited in Maslow (1943). "By supporting people to achieve their goals, you build a reputation for growing talent" (Crowley, 2011, p.103). The Managing Partner espoused his dedication to his people and their growth and achievements and related these to his own achievements and the achievement of the corporate vision. Clearly vision and relationships are interrelated.

### **Implication for Action 4: Character**

Professional organizations can provide their membership with workshops that focus on providing leaders and followers with emotional intelligence training to enhance the leadership experience and promote deeper engagement among followers of all ages and at all stages in the meaning-making process. While a strong moral compass, a



dedication to ethics, and determination to tell the truth all contribute to character that evokes trust in the leader/follower dyad, there are other characteristics that can enhance the success of both the leaders and followers. Sometimes referred to as EQ, emotional intelligence (EI) is more predictive of leadership success than is IQ or a person's intelligence quotient (Boyatzis & McKee, 2005; Bradberry & Greaves, 2009). In this study, the Managing Partner recognized that emotional intelligence is incredibly important, and may be an undervalued asset. Providing leaders and followers the opportunity to increase their emotional intelligence (EI) can enhance the leader/follower dyad by enabling both sides to engage more productively through the values of self-awareness, self-management, social awareness, and relationship management. Thus evaluation, training and measurement of employee EQ may prove beneficial in creating meaning in the organization through self-awareness, self-management, social awareness, and relationship management.

### **Implication for Action 5: Inspiration**

Professional development programs should focus on helping members learn to become inspirational leaders. Leaders and followers should take notice of the two-dimensional nature of inspiration--being inspired by something and/or to something—as it relates to the circumstances and situations faced by the organization and its people. Inspiration comes in all shapes and sizes and from places and events not yet imagined. The biggest obstacle to inspiration is a lack of *openness*. Gilson's (2015) reminds us that “inspiration is two-sided—a trigger and a target—being inspired *by* something and being inspired *to* something” (p. 50) “‘Openness to experience’ often came before inspiration, suggesting that those who are more open to inspiration are more likely to experience it”

(Kaufman, 2011, para. 4). Kaufman also finds that mastery of work came before inspiration—suggesting that inspiration favors the prepared mind.

It is suggested that leaders take time for self-expression, self-expansion, and self-exploration, and to insist that their followers do the same. Management by walking around is a good way to see what followers are doing, and what their situation and circumstances are. Engaging them in conversation about what they are reading in their spare time, where they went on vacation, and in what extracurricular activities they are engaged not only supports openness, but also indirectly suggests that you are interested in their doing things that will make them more aware of the world around them—not to mention showing a personal interest that can bond the dyad more tightly and “enable the prepared mind”.

#### **Implication for Action 6: Wisdom**

Human Resources and C-suite level leaders should be proactive when it comes to increasing the overall level of wisdom in the organization—a closer examination of who is being hired from the perspective that you cannot train current employees to be wiser, but you can hire those with stronger levels of life experiences.

If you can't Google wisdom, and if formal education alone is not wisdom, then where do you get wisdom? White, Harvey & Fox (2016) report that when successful leaders are examined, it might be discovered that these individuals mastered not just one, but a series of skills—ranging from managerial and character skills to vision and inspiration to relational skills, along with wisdom and political competencies. Increasing the level of wisdom in an organization may require a closer examination of who is being hired, and that you cannot train current employees to be wiser. According to the Bureau

of Labor Statistics, there has not been a substantial increase in real wages in nearly 20 years. Companies who want to attract greater levels of wisdom might consider paying for it with higher wages from available senior-level workers.

### **Recommendations for Further Research**

This study has nudged open the door and glimpsed the intricacies of meaning-making. Yet, while there was learning and fulfillment in the gap in the research fabric, there may be an opportunity to weave a totally different cloth in the tapestry of transformational leadership. Opportunities to contribute to the research literature may be made with the following recommendations for study:

1. Further research into the impact age difference may have on followers' perceptions of leadership behavior is recommended. This study discovered what might be called a gravitational pull by older followers toward certain leadership behaviors with regard to five domains—and particularly with regard to the Wisdom domain—that resonate at higher levels of importance with them than resonate among followers with fewer lifetime years of experience. Further research is recommended in this area of meaning-making, with an emphasis on the differences and receptivity of meaning among followers of vastly different ages. Given that organizations are composed of multi-generational teams, with a diversity of ages, it is entirely possible that differences in age and varying degrees of wisdom can impact perception of meaning-making across the age/wisdom spectrum. Exemplary leaders need to determine what their followers personally value and what their motivations entail (Dik et al., 2013).

Because this study was part of a thematic effort, it may be possible to combine the results from the other 11 Researchers to explore whether there were differences observed in behavioral importance by followers in different age groups in those studies, as well.

2. A culturally diverse exploration of meaning-making is recommended to discover the strategies that resonate across a culturally divergent spectrum. In the same vein as is recommended in #1 above, a culturally diverse organization may attribute different levels of behavioral importance to any of the five domains examined in this study.
3. It is recommended that other domains—such as spirituality, purpose and politics—be examined for how they might contribute to the development of personal and organizational meaning. The five domains examined in this study may be likened to planets in a solar system. Might there be other planets orbiting the meaning-making sun that are yet undetected? Is there a sign that some other domain or domains may also be influencing the creation of meaning?
4. It is recommend that a broader geography be examined in the study of how selected domains affect the development of personal and organizational meaning. The geographically limited scope of this study—Southern California—may suggest that a broader geography be examined.

### **Concluding Remarks and Reflections**

This study provided me with insight, a newfound belief system, and an opportunity to view leadership from a different perspective in my personal quest to

become a transformational leader. Its long title underscores the long journey I embarked on years ago—“*Leadership: A Mixed-Method Case Study to Explore the Behaviors a Consulting-Firm Managing Partner Uses to Discover Meaning in their Leadership—for Themselves and their Followers—Through Character, Relationships, Inspiration, Vision, and Wisdom*”. While a long title, the writing of this dissertation is a short chapter in the realm of what I really learned and experienced. I discovered more about myself along this journey than at any other time in my life. I learned that it would not have been possible to discover who I am, were it not for the cumulative dedication and wisdom of my professors, colleagues, family and friends. I discovered that I was not alone, and I learned that I am able to overcome seemingly endless obstacles and economic downturns; and that perseverance and drive were not the only attributes I had going for me.

This dissertation and the resulting doctoral degree mark a lifelong ambition to exceed and excel in the passion for leadership that was thrust upon me at the time of my father’s early death, near my thirteenth birthday. Written in fountain pen, in black ink, in his high school graduation autograph book was the notation on the line that read: “What do you want to be?” He wrote “*Doctor*”. He never got that far. But now, not only do I fulfill my own capstone accomplishment, but I do so in a commemoration of my father’s wishes a decade before my birth.

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**Appendix A: Informed Consent and Informational Letter**

**INFORMATION ABOUT:** The behaviors of exemplary leaders related to character, vision, relationships, wisdom and inspiration to help create personal and organizational meaning.

**RESPONSIBLE INVESTIGATOR:** Robert J. Mancuso, M.B.A.

**PURPOSE OF STUDY:**

You are being asked to participate in a research study conducted by Robert J. Mancuso, M.B.A., and a doctoral student from the School of Education at Brandman University. The purpose of the study is to identify and describe the behaviors that leaders use to create personal and organizational meaning for themselves and their followers through character, vision, relationships, wisdom and inspiration.

Your participation in this study is voluntary and will include an interview with the identified student researcher. The interview will take approximately 60 minutes to complete and will be scheduled at a time and location of your convenience. The interview questions will pertain to your perceptions and your responses will be confidential. Each participant will have an identifying code and names will not be used in data analysis. The results of this study will be used for scholarly purposes only.

**I understand that:**

- a) The researcher will protect my confidentiality by keeping the identifying codes safe-guarded in a locked file drawer or password protected digital file to which the researcher will have sole access.
- b) My participation in this research study is voluntary. I may decide to not participate in the study and I can withdraw at any time. I can also decide not to answer particular questions during the interview if I so choose. Also, the Investigator may stop the study at any time.
- c) If I have any questions or concerns about the research, feel free to contact Robert J. Mancuso at [mancuso@mail.brandman.edu](mailto:mancuso@mail.brandman.edu) or by phone at 949.706.0806; or Dr. Patricia While (Advisor) at [pwhite@brandman.edu](mailto:pwhite@brandman.edu).
- d) No information that identifies me will be released without my separate consent and all identifiable information will be protected to the limits allowed by law. If the study design or the use of the data is to be changed, I will be so informed and consent re-obtained. There are minimal risks associated with participating in this research.
- e) If I have any questions, comments, or concerns about the study or the informed consent process, I may write or call the Office of the Vice Chancellor of Academic Affairs, Brandman University, at 16355 Laguna Canyon Road, Irvine, CA 92618, (949) 341-7641.

I acknowledge that I have received a copy of this form and the “Research Participant’s Bill of Rights.” I have read the above and understand it and hereby consent to the procedure(s) set forth.

\_\_\_\_\_  
Signature of Participant or Responsible Party

Date: \_\_\_\_\_

\_\_\_\_\_  
Signature of Principal Investigation

Date: \_\_\_\_\_

**APPENDIX A (continued):** Informational Letter



March 3, 2017  
Mr. John Doe  
*Managing Partner*  
Company Name, Inc.  
One Main Street, Suite 400  
Anytown, California 92614

Dear Mr. Doe

I am a member of a 12-member team of thematic researchers from the Organizational Leadership Doctoral program at Brandman University who are conducting a study on meaning making. The purpose of our mixed-method case study is to identify and describe behaviors that exemplary leaders, like yourself, use to create personal and organizational meaning for themselves and their followers. Additionally, we wanted to determine the degree of importance your followers attach to various behaviors that create personal and organizational meaning for them.

We are asking your assistance in the study by participating in very brief interview, then enabling a subsequent 10-minute survey among your followers. The interview will take approximately 30 minutes. I want to set up a time convenient for you. If you agree to participate in our study, you and your followers are assured complete confidentiality and anonymity. No personal or corporate names will be attached to any notes or records from the interview. All information will remain in locked files accessible only to the researchers. No agencies or entities will have access to the interview or the survey information. You will be free to stop the interview, or your followers from the survey, and withdraw from the study at any time. Further, you may be assured that the researchers are not in any way affiliated with any outside agencies. This is purely for research purposes in order to build on a body of literature for a scholarly dissertation.

At the conclusion of my dissertation, I will be glad to send you a copy of my aggregate leadership findings representing your industry.

My advisor, Dr. Patricia Clark White, is available at Brandman University's School of Education at 949-585-2987 to answer any questions you may have regarding this research. Your participation is greatly valued.

Sincerely,  
Robert J. Mancuso, B. S., M.B.A.

## **Appendix B: Qualitative Interview Informed Consent and Interview Schedule**

“My name is Robert Mancuso. I am a full-time student and doctoral candidate at Brandman University in the area of Organizational Leadership. I also work part-time for the United States Department of Commerce, Bureau of the Census.

I’m a part of a team conducting research to determine what behaviors are used by exemplary leaders to create effective organizations. What is it that you do to create a positive work environment and a healthy culture, and to bring meaning to your organization?

Our team is conducting approximately THREE interviews with leaders like yourself. The information you provide, along with the information provided by others, hopefully will provide a clear picture of the thoughts and strategies that exemplary leaders use to create effective organizations and will add to the body of research currently available. We are also inquiring from a sample of your management-level team using a survey instrument to obtain their impressions as well.

Incidentally, even though it appears a bit awkward, I will be reading most of what I say. The reason for this is to guarantee, as much as possible, that my interviews with all participating exemplary leaders will be conducted in the most similar manner possible.

### **Informed Consent (required for Dissertation Research)**

I would like to remind you any information that is obtained in connection to this study will remain confidential. All of the data will be reported without reference to any individual(s) or any institution(s). After I record and transcribe the data, I will send it to you via electronic mail so that you can check to make sure that I have accurately captured your thoughts and ideas.

You received the Informed Consent and Brandman Bill of Rights in an email and responded with your approval to participate in the interview. Before we start, do you have any questions or need clarification about either document?

We have scheduled an hour for the interview. At any point during the interview, you may ask that I skip a particular question or stop the interview altogether. For ease of our discussion and accuracy I will record our conversation as indicated in the Informed Consent.

Do you have any questions before we begin? Okay, let’s get started, and thanks so much for your time.



## Appendix B (continued): Qualitative Interview Schedule

3. *“The second item on the card is Establishing Relationships. This involves being a good listener and establishing trust among your team members. Are there specific things you have done to develop relationships among the members of your organization?”*
  - “Are there some that seemed to work better than others?”
  - “Why do you think they (it) worked as well as they (it) did?”
  - “Were there any unintended outcomes, positive or negative, from the use of that particular strategy?”
4. *“If you take a look at the card, one of the five important leadership behaviors is character and leading with a moral compass. This includes integrity...reliability...authenticity. “What kinds of things do you do to demonstrate your character as the leader of your organization?”*
  - *“What behaviors do you look for in your peers or employees that demonstrate their character?”*
  - “How do you communicate the importance of these behaviors to your staff members?”
  - “Are there challenges that you face as you deal with these issues on a daily basis?”
  - “Are there any unintended outcomes, positive or negative, from the use of a particular strategy?”
5. *“As stated on the card, an inspirational leader empowers staff by exuding enthusiasm, encouragement, and hope. Tell me about some of the things you do to inspire your staff to be all they can be.”*
  - “Are there some things that seemed to work better than others?”
  - “Why do you think they (it) worked as well as they (it) did?”
  - “If a situation like this did arise in the future, how do you think you would you go about clarifying the situation to put your staff’s mind at ease and feel ready to go?”
  - “Were there any unintended outcomes, positive or negative, from the use of any particular strategy?”

## Appendix B (continued): Qualitative Interview Schedule

6. *“The fifth item on the card is Wisdom. As the card states, responding effectively to unclear, complex issues is called for here. Can you describe a time when your organization faced a very complex or unclear situation?”*

If yes:

“What did you do or what strategies did you put in place to clarify the situation so that progress was possible?”

If no:

- “Are there some strategies that seemed to (or you think would) work better than others?”
- “Why do you think they (it) worked (would work) well?”
- “Were there any unintended outcomes, positive or negative, from the use of that particular strategy?”

7. *“Of all the things we have spoken about today—vision, relationships, character, inspiration and wisdom—are there absolute ‘musts!’ that you believe are essential behaviors for an exemplary leader to have?”*

**If yes: “What are those behaviors and why do you believe they are so critical?”**

**“Thank you very much for your time. If you like, when the results of our research are known, we will send you a copy of our findings.”**

### **GENERIC PROBES THAT CAN BE ADDED TO ANY QUESTION TO PRODUCE MORE CONVERSATION:**

1. “Would you expand upon that a bit?”
2. “Do you have more to add?”
3. “What did you mean by ....?”
4. “Why do think that was the case?”
5. “Could you please tell me more about...? “
6. “Can you give me an example of ....?”
7. “How did you feel about that?”

**Suggest you put these generic probes on a card so you can use them any time you need to encourage an interviewee to say more about a question you have asked.**



## Appendix C: Quantitative Research Survey Instrument

# Survey of Leadership Behaviors That Contribute To Personal and Organizational Meaning

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**Introduction:** The success of any organization may depend in large part on the quality of interactions among the leader and the team members and associates. The purpose of this inquiry is to seek your perceptions of the importance of leadership behaviors in five areas: *vision for the organization; relationships between the leader and team members; character of the leader; inspiration the leader provides; wisdom of the leader.*

Completing this survey will take approximately 10 minutes. Please choose to become a part of this important undertaking.

**It is important to read the following consent information carefully and click the agree box to continue. The survey will not open until you agree.**

### INFORMED CONSENT

**INFORMATION ABOUT:** The degree of importance regarding leaders' behaviors related to character, vision, relationships, wisdom and inspiration help to create personal and organizational meaning.

**RESPONSIBLE INVESTIGATOR:** Robert J. Mancuso, M.B.A.

***THE FOLLOWING WILL BE INCLUDED IN THE ELECTRONIC SURVEY:***

You are being asked to participate in a research study conducted by Robert J. Mancuso, M.B.A., a doctoral student from the School of Education at Brandman University. *The purpose of study is to identify and describe the behaviors that leaders use to create personal and organizational meaning for themselves and their followers through character, vision, relationships, wisdom and inspiration.*

Your participation in this survey is voluntary. You may choose not to participate. If you decide to participate in this electronic survey, you can withdraw at any time.

The survey will take approximately 10 minutes to complete. Your responses will be confidential. The survey questions will pertain to your perceptions.

Each participant will use a three-digit code for identification purposes. The researcher will keep the identifying codes safeguarded in a locked file drawer to which the researcher will have sole access. The results of this study will be used for scholarly purposes only.

## Appendix C (continued): Research Survey Instrument

No information that identifies you will be released without your separate consent and all identifiable information will be protected to the limits allowed by law. If the study design or the use of the data is to be changed, you will be so informed and consent re-obtained. There are minimal risks associated with participating in this research.

I understand that the investigator will protect my confidentiality by keeping the identifying codes and research materials in a locked file drawer that is available only to the researcher. I understand that I may refuse to participate in or I may withdraw from this study at any time without any negative consequences. Also, the investigator may stop the study at any time. I understand that if I have any questions, comments, or concerns about the study or the informed consent process, I may write or call the Office of the Vice Chancellor of Academic Affairs, Brandman University, at 16355 Laguna Canyon Road, Irvine, CA 92618, (949) 341-7641.

If you have any questions about completing this survey or any aspects of this research, please contact Robert J. Mancuso at [robertjmancuso@gmail.com](mailto:robertjmancuso@gmail.com), or by phone at 949-293-0986; or Dr. White, Advisor, at [pwhite@brandman.edu](mailto:pwhite@brandman.edu).

**ELECTRONIC CONSENT:** Please select your choice below.

Clicking on the “agree” button indicates that you have read the informed consent form and the information in this document and that you voluntarily agree to participate.

If you do not wish to participate in this electronic survey, you may decline participation by clicking on the “disagree” button.

The survey will not open for responses unless you agree to participate.

AGREE: I acknowledge receipt of the complete Informed Consent packet and “Bill of Rights.” I have read the materials and give my consent to participate in the study.

DISAGREE: I do not wish to participate in this electronic survey.

## Appendix C (continued): Research Survey Instrument

**LEADERSHIP SURVEY—Part 1 Directions:** For purposes of this study and survey, meaning is defined as the result of leaders and followers coming together for the purpose of gathering information from experience and integrating it into a process which creates significance, value and identity within themselves and the organization.

Listed below are behaviors that research suggests that leaders use to create personal and organizational meaning.

Using the following descriptions, which one comes the closest to your feelings about the importance of the leadership behavior in developing meaning in your organization.

1 = Not important in our organization; its absence would have no effect upon the leader's overall effectiveness nor our organization's culture.

2 = Marginally important to have but not necessary in our organization; its absence would have little effect upon the leader's effectiveness or the cultural health of our organization.

3 = Somewhat important for a leader in our organization; this is a leadership behavior that would have a positive effect upon how we function and would contribute in some positive ways to our organizational culture.

4 = Important for a leader in our organization; this is a leadership behavior that is good for the organization and its absence in the leader would be a definite deterrent in the organization's overall effectiveness as well as culture.

5 = Very important for a leader in our organization; would contribute significantly to our overall effectiveness and enhance our organizational culture in some very positive ways.

6 = Critically important in our organization; an absolute must; its absence would severely inhibit the leader's effectiveness and the overall health of our organizational culture.

## Appendix C (continued): Research Survey Instrument

LEADERSHIP BEHAVIORS		1	2	3	4	5	6
1.	Continuously promotes our team's moving together as one unit to serve a common purpose. (relationships)						
2.	Creates an environment of trust among leaders and team members in the organization. (relationships)						
3.	Behaves in a way that shows she/he cares about the team members. (relationships)						
4.	Communicates in a clear, meaningful way. (relationships)						
5.	Encourages team members to share leadership when performing tasks. (relationships)						
6.	Behaves in an ethical manner when dealing with others. (character)						
7.	Actively listens when communicating with others. (character)						
8.	Responds to challenging situations with optimism. (character)						
9.	Actions with others show that he/she can be trusted. (character)						
10.	Actions show concern for the well-being of others. (character)						
11.	Works with team members in a way that generates enthusiasm within teams. (inspiration)						
12.	Recognizes and honors achievements of teams and team members. (inspiration)						
13.	Encourages team members to innovate in order to advance the organization's leading edge. (inspiration)						
14.	Engages in activities that build confidence among team members. (inspiration)						
15.	Empowers team members to take reasonable risks when problem solving. (inspiration)						
16.	Demonstrates thinking toward the future through conversations and actions. (vision)						
17.	Communicates the organization's vision in a way in team members enthusiastically. (vision)						
18.	Engages team members in creating a vision for the future. (vision)						
19.	Behavior reflects organizational vision when making decisions. (vision)						
20.	Promotes innovation that aligns with the organization's vision. (vision)						
21.	Elevates the quality of decision making by discussing similarities of past situations with team members. (wisdom)						
22.	Demonstrates compassion with team members. (wisdom)						
23.	Behavior reflects an understanding of life's complexities. (wisdom)						
24.	Integrates personal values with organizational values in decision making. (wisdom)						
25.	Brings personal knowledge to the table when responding to complex situations within the organization. (wisdom)						
26.	Considers past experiences when responding to complex situations within the organization. (wisdom)						
27.	Displays expertise when working in a variety of situations within the organization. (wisdom)						
28.	Shows concern for others in a variety of organizational settings. (wisdom)						
29.	When working with teams and team members, continuously keeps the overall goals of the organization as part of conversations. (wisdom)						
30.	Takes action by doing the "right thing" in a variety of organizational settings. (wisdom)						

## Appendix C (continued): Quantitative Research Survey Instrument—Part 2 Directions

Please supply the following information. The information will be used only to assist in understanding the results of this inquiry.

1. Your gender:      Female                    Male
2. Your age category:        20-30    31-40    41-50    51-60    61 or over
3. Your time with the organization:    0- 5 yrs.    6-10 yrs.    11-20 yrs.    21 years or over.
4. Your time with the current leader:        0-2 yrs.    3-5 yrs.    6-10 yrs.    11 yrs. Or over.

**When Completed—(directions for what to do)**

**Thank you for your time. It is very much appreciated.**

## Appendix D: Field Test Participant Feedback Questions

### Field Test Participant Feedback Questions

While conducting the interview, you should take notes of their clarification request or comments about not being clear about the question. After you complete the interview, ask your field-test interviewee the following clarifying questions. **Try not to make it another interview; just have a friendly conversation.** Either script or record their feedback so you can compare with the other two members of your team to develop your feedback report on how to improve the interview questions.

*Before the brief post-interview discussion, give the interviewee a copy of the interview protocol. If their answers imply that some kind of improvement is necessary, follow up for specificity.*

1. How did you feel about the interview? Do you think you had ample opportunities to describe what you do as a leader when working with your team or staff?
2. Did you feel the amount of time for the interview was OK?
3. Were the questions by and large clear or were there places where you were uncertain what was being asked?
4. Can you recall any words or terms being asked about during the interview that were confusing?
5. And finally, did I appear comfortable during the interview... (I'm pretty new at this)?

## Appendix E: Interview Feedback Reflection Questions

### Interview Feedback Reflection Questions

Conducting interviews is a learned skill set/experience. Gaining valuable insight about your interview skills and affect with the interview will support your data gathering when interviewing the actual participants.

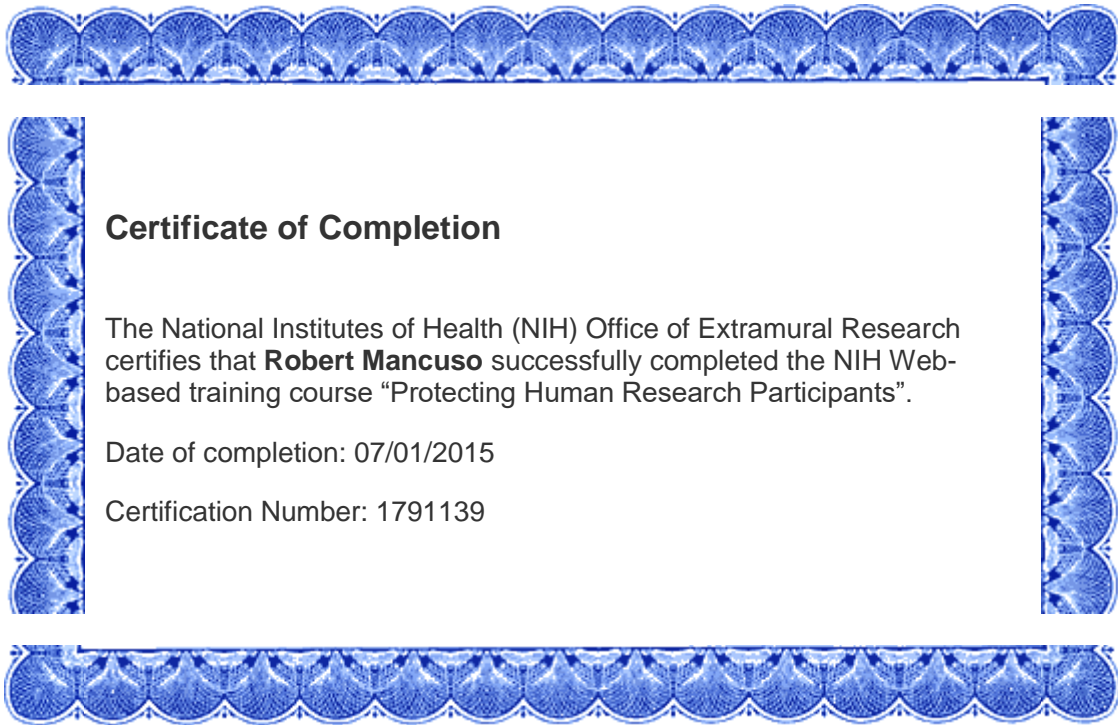
As the researcher, you should reflect on the questions below after completing the interview.

You should also discuss the following reflection questions with your 'observer' after completing the interview field test.

The questions are written from your prospective as the interviewer. However, you can verbalize your thoughts with the observer and they can add valuable insight from their observation.

1. How long did the interview take? \_\_\_\_\_ Did the time seem to be appropriate?
2. How did you feel during the interview? Comfortable? Nervous?
3. Going into it, did you feel prepared to conduct the interview? Is there something you could have done to be better prepared?
4. What parts of the interview went the most smoothly and why do you think that was the case?
5. What parts of the interview seemed to struggle and why do you think that was the case?
6. If you were to change any part of the interview, what would that part be and how would you change it?
7. What suggestions do you have for improving the overall process?

## Appendix F: NIH Certificate



Screen capture of the National Institutes of Health (NIH) protecting human research participant’s certification which was provided to the Institutional Review Board (IRB) of Brandman University. This certifies that doctoral candidate, Robert Mancuso, has successfully completed the “Protecting Human Research Participants” training.



## **Appendix G: Research Participant's Bill of Rights**

### **BRANDMAN UNIVERSITY INSTITUTIONAL REVIEW BOARD**

#### **Research Participant's Bill of Rights**

Any person who is requested to consent to participate as a subject in an experiment, or who is requested to consent on behalf of another, has the following rights:

1. To be told what the study is attempting to discover.
2. To be told what will happen in the study and whether any of the procedures, drugs or devices are different from what would be used in standard practice.
3. To be told about the risks, side effects or discomforts of the things that may happen to him/her.
4. To be told if he/she can expect any benefit from participating and, if so, what the benefits might be.
5. To be told what other choices he/she has and how they may be better or worse than being in the study.
6. To be allowed to ask any questions concerning the study both before agreeing to be involved and during the course of the study.
7. To be told what sort of medical treatment is available if any complications arise.
8. To refuse to participate at all before or after the study is started without any adverse effects.
9. To receive a copy of the signed and dated consent form.
10. To be free of pressures when considering whether he/she wishes to agree to be in the study.

If at any time you have questions regarding a research study, you should ask the researchers to answer them. You also may contact the Brandman University Institutional Review Board, which is concerned with the protection of volunteers in research projects. The Brandman University Institutional Review Board may be contacted either by telephoning the Office of Academic Affairs at (949) 341-9937 or by writing to the Vice Chancellor of Academic Affairs, Brandman University, 16355 Laguna Canyon Road, Irvine, CA, 92618.

Brandman University IRB Adopted November 2013

**Appendix H: Audio Release Form**

**Audio Release**

**RESEARCH STUDY TITLE:** Exemplary Leadership: A Mixed-Method Case Study  
Discovering How Exemplar Consulting-Firm Managing Partners Create Meaning in  
Their Leadership.

**BRANDMAN UNIVERSITY**  
**16355 LAGUNA CANYON ROAD**  
**IRVINE, CA 92618**

**RESPONSIBLE INVESTIGATOR:** Robert J. Mancuso, B.S., M.B.A.

I authorize Robert J. Mancuso, B.S., M.B.A., a Brandman University Doctoral Candidate, to record my voice. I give Brandman University, and all persons or entities associated with this study, permission or authority to use this recording for activities associated with this research study.

I understand that the recording will be used for transcription purposes and the identifier-redacted information obtained during the interview may be published in a journal or presented at meetings and/or presentations. I will be consulted about the use of the audio recordings for any purpose other than those listed above. Additionally, I waive any rights and royalties or other compensation arising from or related to the use of information obtained from the recording.

By signing this form, I acknowledge that I have completely read and fully understand the above release and agree to the outlined terms. I hereby release any and all claims against any person or organization utilizing this material.

\_\_\_\_\_  
Printed Name of Participant or Responsible Party

\_\_\_\_\_  
Signature of Participant or Responsible Party

Date: \_\_\_\_\_

\_\_\_\_\_  
Signature of Investigator – Robert J. Mancuso, M.B.A.

Date: \_\_\_\_\_

