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Chapter 7

Being Both Leaders and Followers: Advancing a Model of Leader and Follower Role Switching

Thomas Sy and Tara McCoy

Abstract

We propose a novel construct on Leader–Follower Switching (LFS). We delineate the key theoretical tenets of LFS. First, LFS is predicated on the premise that individuals possess schemas for leader and follower roles (i.e., implicit theories of leadership and followership) and role switching involve the activation of these schemas. Second, LFS may be a function of individual differences i.e., the four LFS styles: (i.e., Dynamism, Leader-Stasis, Follower-Stasis, and Capsulation) and context (e.g., contextual cues trigger leader and follower schemas). Third, LFS encompasses behavioral enactment (i.e., individuals behaviorally enact the leader or follower roles that are mentally activated) that is explained by the Perception-Behavior Link. Fourth, LFS processes can operate in controlled (conscious) or automatic (preconscious) fashion. Having explicated the theoretical foundation of LFS, we propose an agenda for future research, focusing on assessment, antecedents (e.g., leader and follower experiences, implicit theories of leadership and followership, organizational hierarchy, and culture), and outcomes (e.g., job satisfaction, relationship quality, and leadership effectiveness) of LFS.

Keywords: Leadership; followership; roles; switching; styles

Imagine yourself at work talking with your supervisor. How do you see your role in this situation, as a follower? Now, imagine that you are talking with an employee you recently hired. How do you see your role in this situation, as a leader? A colleague recently described a similar common occurrence at work; she said, "During the same shift, when I am training newly hired employees, I take on the role of a leader although I am not officially in a managerial role. Then, when I interact with my

Followership: What Is It and Why Do People Follow?
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ISBN: 978-1-78350-515-9

supervisor or employees who have more seniority than me, I think of myself as a follower. This happens several times each time I work." The above experience describes how employees may enact both leader and follower roles and the influence of different contextual cues (e.g., levels of hierarchy) in shaping the (leader and follower) roles that individuals enact. The example illustrates the phenomenon of Leader–Follower Switching (LFS), which we define as the *intrapersonal process* of dynamically switching between leader and follower roles. This process may operate independent of formally designated roles (e.g., managerial assignments and titles). For example, middle managers (i.e., employees with a formal title designated by the organization) may enact *both* a follower role when discussing strategic plans with the CEO, and a leader role when interacting with their subordinates to implement strategic plans. Similarly, as illustrated in the above example, employees with no formal management designation may enact both leader and follower roles. Although implicated in the literature (e.g., Pearce & Conger, 2002), LFS has not been directly investigated perhaps because leadership and followership are typically portrayed as static roles. Accordingly, we bring this prevalent and core assumption to the foreground for direct investigation. In this chapter, we first define LFS and articulate its key theoretical tenets. Second, we describe the four styles of LFS (i.e., Dynamism, Leader-Stasis, Follower-Stasis, and Capsulation) that reflect individual differences in preference for switching between leader and follower roles. Finally, we propose a research agenda for investigating LFS focusing on its measurement, its antecedents (e.g., leader and follower experiences, implicit theories of leadership and followership, organizational hierarchy, and culture), and its outcomes (e.g., job satisfaction, relationship quality, and leadership effectiveness).

7.1. LFS: Integrating the Domains of Leadership and Followership

Traditional theories of leadership focus primarily on leaders and their behaviors. These are considered leader-centric theories (Hollander, 1992a, 1992b). Similarly, follower-centric theories (Meindl, 1995) focus on followers in order to understand leaders and leadership, such as the effects of followers' self-concepts on charismatic leadership (Howell & Shamir, 2005) and the effects of followers' personality on transformational leadership (Felfe & Schyns, 2010). Whereas most research tends to be leader-centric or follower-centric, we advance the literature in the current research by taking an integrative approach because leadership and followership are inherently interdependent in LFS. Certain roles do not exist without the presence of the other (Brown, 1965); there would be no leaders or leadership without followers, and vice versa. Essentially, both roles dynamically influence each other (Sy, 2010). By integrating the duality of leadership and followership, LFS may enhance our understanding of both domains.

LFS emphasizes the dual roles of employees. That is, some employees can be both leaders and followers. Moreover, LFS highlights the Dynamism of this duality, such that the roles are permeable and individuals may dynamically shift between

both roles. This duality and Dynamism may explain when employees may enact leader and follower roles. Therefore, investigating LFS may help us further understand why and when individuals follow or lead. As such, although the primary aim of this book is followership, we take a holistic approach to focus on both leadership and followership given they are highly interdependent within the context of LFS.

7.2. LFS within Extant Leadership Literature

Although LFS has not been directly investigated, it is implicated in the leadership literature (e.g., Carson, Tesluk, & Marrone, 2007; DeRue & Ashford, 2010; Pearce & Conger, 2002; Uhl-Bien, 2006; Yammarino, Salas, Serban, Shirreffs, & Shuffler, 2012). Moreover, evidence for the enactment of multiple social roles is well established in the social psychological literature, which lends support for the dual enactment of leader and follower roles. For example, individuals may possess multiple self-schemas (Tajfel, 2010). Moreover, individuals may activate different self-schemas as a function of context, such as describing the self in terms of conditions "I am ... when" as opposed to traits "I am" (Mendoza-Denton, Ayduk, Mischel, Shoda, & Testa, 2001). Individuals' activated self-schemas (as leaders or followers) can trigger corresponding behavioral enactment as predicted by the Perception-Behavior Link (as described below) (Chartrand, Maddux, & Lakin, 2005; Chen & Bargh, 1997; Dijksterhuis & van Knippenberg, 1998).

Given the novel nature of our construct, we review relevant literature, such as the collectivistic leadership literature, to develop further our conception of LFS. A commonality among the multiple theories that fall within the collectivistic leadership category is that leadership is distributed and may reside in multiple individuals at different times. Fundamentally, these individuals rise and recede as leaders within their groups temporally based on the context. Within the collectivistic leadership body of work, Shared Leadership (Pearce & Conger, 2002) is particularly relevant because it most directly addresses the organizational behavior Dynamics that are inherent in LFS.

A key tenet of Shared Leadership is that leadership is shared amongst group members, and the leader role is assumed momentarily by the individual most suited to lead the task; all others assume follower roles. A main assumption is that multiple individuals in the group may enact the role of leader at different times. Similarly, the same individuals may enact follower roles when they are not in the role of leader. Thus, this process is Dynamic such that individuals may switch between leader and follower roles overtime. Due to the dual roles displayed in multiple individuals, Shared Leadership clearly demonstrates the duality of leader and follower roles. It highlights that one's role is not solely defined by one's formal designation within an organization and one may enact both roles as leaders and followers (Denis, Langley, & Sergi, 2012).

Given their shared assumptions, it is important to make a distinction between LFS and Shared Leadership. LFS is *intra*-personal in focus, highlighting the process

of Dynamic switching between leader and follower roles within an individual, whereas Shared Leadership is *inter*-personal in focus, highlighting the distribution of leadership responsibilities across multiple individuals (Pearce & Conger, 2002). Moreover, unlike Shared Leadership, LFS is not restricted to teams; the role switching process resides in the individual. We posit that LFS is a contextually-sensitive intrapersonal process such that stimuli in the environment serve as cues to activate leader or follower roles. As our opening example illustrates, the mere presence of an entry-level employee may serve as a cue that activates a leader role within the individual. This role activation occurs prior to any interpersonal exchange (i.e., it is not necessarily a function of interpersonal processes). Similarly, the mere presence of a more senior supervisor may serve as a cue that activates a follower role in an individual. As another example, clothing (such as rank designation on military uniforms) may also serve as contextual cues in the intrapersonal process of activating leader and follower roles (e.g., Frank & Gilovich, 1988).

In addition to Shared Leadership, a related process to LFS is DeRue and Ashford's (2010) notion of granting and claiming leader and follower identities. They theorized "various contextual factors can cause leader and follower identities to shift over time and across situations" (p. 628). Specifically, they posit follower and leader roles are flexibly negotiated between people; individuals are able to "claim" or "grant" leader and follower roles based on how individuals conceptualize the construction of leadership, the clarity and visibility of the grants and claims, and previous interactions of claims and grants. Essentially, their theory implies that individuals' self-schemas as leaders and followers are not static. These self-schemas change as a function of interpersonal negotiations; "When a focal person claims a leader or follower identity, this stimulates other people in the social environment to consider seeing that focal person in accordance with that particular identity. They communicate their acceptance of this perception by granting that particular identity to the focal person through their words or actions (directly or indirectly)" (DeRue & Ashford, 2010, p. 632). Although related, DeRue and Ashford's notion of negotiated leader–follower self-schemas is complimentary to LFS. Whereas DeRue and Ashford primarily focus on the relational (interpersonal) Dynamics of negotiated leader–follower self-schemas, LFS is an intrapersonal process that may be independent of relational Dynamics. Moreover, LFS also reflect a trait-like construct (vs. Dynamic interpersonal processes) consisting of individual differences in preference for switching between leader and follower roles. Another noteworthy difference is that DeRue and Ashford's theory is focused on "identity" formation, whereas LFS is focused on "roles," which as we explain below encompasses schema activation and corresponding behavioral enactment (Smith, 2007).

7.3. Key Tenets of LFS

Inherent in our definition of LFS (as an *intrapersonal process* of dynamically switching between leader and follower roles) is the assumption that the LFS process

involves the following key tenets. First, LFS is predicated on the premise that individuals must possess schemas for leader and follower roles (i.e., implicit theories of leadership and followership) (Epitropaki, Sy, Martin, Tram-Quon, & Topakas, 2013; Lord & Maher, 1991; Sy, 2010) in order for role switching to occur. These schemas are developed from prior experiences (Keller, 2000). For switching to occur, individuals must have internalized the cognitive, emotional, and behavioral associations relevant to those schemas. In addition, although implicit theories of leadership and followership may be shared, the specific enactment of the role (i.e. the behaviors) depends on individuals' endorsement for certain implicit theories (Sy, 2010; Sy et al., 2010). For example, individuals endorsing the Dynamic (vs. Tyranny) leader prototype may display more charismatic (vs. domineering) behaviors.

Second, leader and follower roles are permeable, and individuals differ in the degree to which they role switch. The degree of role switching may reflect an individual difference variable, whereby some individuals are more capable than others in role switching (see discussion below on the four styles of LFS). Simultaneously, contextual cues may shape the role switching process. For example, contextual cues could involve others' (leader or follower) roles (e.g., the example in the opening paragraph illustrates how a newly hired employee or the CEO may respectively serve as cues for leader or follower enactment) or task demands (e.g., the need for leadership in a newly formed group may trigger the enactment of a leader role). Thus, LFS may be a function of the presence of contextual cues, which activate different leader or follower schemas that are subsequently behaviorally enacted (via the Perception-Behavior Link explained below). Certain leader and follower roles can also be activated due to triggered memories of similar contextual situations when individuals have assumed those roles (Smith, 1996). When individuals encounter situations that are similar to previous situations, they may recall roles they enacted during those times, which then trigger the enactment of the same roles again. However, the influence of contextual cues on behaviors does not necessarily lead to compulsory reactions. For contextual cues to influence behaviors, cues must be cognitively accessible (the schema is implicitly or explicitly activated) and relevant to the current context (Hong, Benet-Martinez, Morris, & Chiu, 2003; Hong, Morris, Chiu, & Benet-Martinez, 2000).

Third, individuals behaviorally enact the (leader or follower) roles that are mentally activated. Once contextual cues activate certain leader or follower schemas, the Perception-Behavior Link posits that behavioral enactment will ensue. The Perception-Behavior Link states that the activation of perceptual representation (e.g., leader or follower schemas) increases the tendency to behave in ways that correspond with that cognition (for a review, see Dijksterhuis & Bargh, 2001). Ample evidence has demonstrated that perceptions lead to corresponding behavioral enactment (e.g., Bargh et al., 1996; Chartrand et al., 2005; Dijksterhuis & van Knippenberg, 1998). A strong link exists between perceptions and behaviors because just as schemas are mentally represented, so are behavioral responses, and the activation of one leads to the activation of the other to the extent that these perceptions and behaviors have been previous activated frequently and consistently over time (Collins & Loftus, 1975; Dijksterhuis & van Knippenberg, 1998). Thus, individuals

are more likely to behave as leaders (or followers) when their self-schemas as leaders (or followers) are activated.

Fourth, the LFS process can be controlled (conscious) or automatic (preconscious). Extrapolating from past research on controlled and automatic processes, research has shown that processes similar to LFS may be consciously enacted at first (e.g., when individuals are learning to lead) and subsequently, become more automatic as individuals become more proficient, and less effortful processing is required (Smith & DeCoster, 2000; Strack & Deutsch, 2004). For example, a novel situation may call for a controlled, conscious approach (e.g., individuals may consciously decide to enact a leadership role when meeting their subordinates for the first time). In contrast, an automatic, unconscious approach will be used for routine situations that do not require much effortful processing (Cunningham, Raye, & Johnson, 2004), such as when a leader interacts with their subordinates in daily meetings to review task progress. Accordingly, LFS likely reflects a combination of automatic and controlled processes.

7.4. Four Styles of LFS

Individuals may differ in their capacity to role switch. Although role switching has not been directly examined in the leadership domain, it has received much attention in the acculturation and multiculturalism literature (Berry, 1997; Hong et al., 2000; Rudmin, 2003; Verkuyten & Pouliasi, 2006). Accordingly, we extrapolate key findings from this literature to inform our theoretical model of LFS style because the role switching process for leaders and followers are likely to parallel the basic processes in the acculturation and multiculturalism literature. Specifically, we have conceptualized the four styles of LFS on the basis of research indicating individuals can switch their cognitions and behaviors as a function of context (Benet-Martínez, Leu, Lee, & Morris, 2002; Hong et al., 2000; Verkuyten & Pouliasi, 2006). Individuals possess multiple self-schemas, with certain schemas enacted at different times and contexts (Benet-Martínez et al., 2002). Similar to the Perception-Behavior Link, different self-schemas may be activated in individuals that influence how they perceive themselves, as well as how they behave (Benet-Martínez et al., 2002; Phinney & Devich-Navarro, 1997; Segall, Lonner, & Berry, 1998). Individuals' ability to switch between multiple perspectives has been documented in a variety of domains, such as self-construals, attributions, ethnic identity, values, decision making, cooperation, and among others (for a review, see Benet-Martínez, in press).

Although the four LFS styles likely adhere to the same theoretical tenets described above, we propose that individuals differ in their capacity for LFS based on research showing that individuals vary in the degree to which they possess multiple self-schemas and their ability to switch between these self-schemas (Berry, 2003; Hong et al., 2000). Specifically, we posit individuals in organizational contexts simultaneously deal with two central orientations: (1) the extent to which they are motivated and allowed to enact leadership roles and (2) the extent to which they are

motivated and allowed to enact followership roles. The ways in which individuals address these central issues may determine their endorsement for the LFS styles, and corresponding behavioral enactment of leadership and followership roles. Negotiating these central orientations results in four distinct styles (see Figure 7.1): Dynamism, Leader-Stasis, Follower-Stasis, and Capsulation. These styles parallel the findings of previous empirical research on the influence of activated self-schemas in shaping role enactment (Benet-Martínez, in press; Benet-Martínez et al., 2002; Berry, 1997; Berry, Phinney, Sam, & Vedder, 2006; Hong et al., 2000; Kim-Jo, Benet-Martínez, & Ozer, 2010; Verkuyten & Pouliasi, 2006). We describe each of the four LFS styles below.

7.4.1. *Dynamism Style*

Individuals with the Dynamism style are high on both leader and follower orientations. Because they have internalized both roles, they frequently switch between leader and follower roles. Of the four styles, Dynamic individuals exhibit the most frequent switching. Within organizational contexts, mid-level managers are the most likely to possess this style given their frequency of contact with both supervisors and subordinates that require them to enact different roles. In a single day a mid-level manager may switch between leader and follower roles multiple times. They may enact a follower role when interacting with senior-level executives, and may

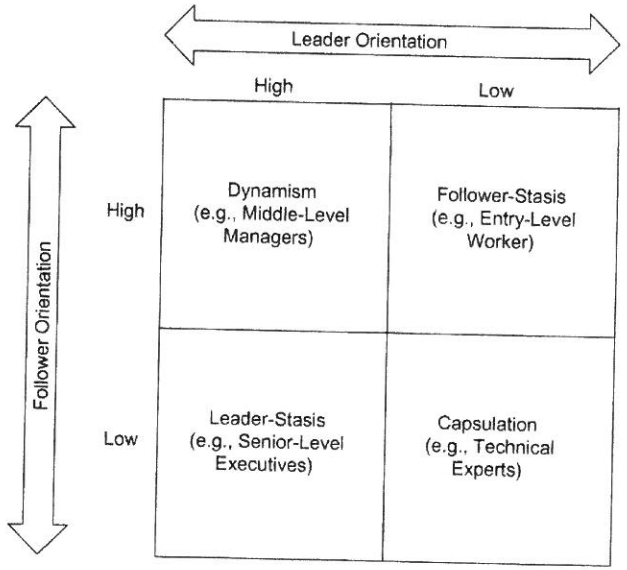

Figure 7.1: A model of leader–follower switching styles

enact a leader role when interacting with direct subordinates. Similarly, the Dynamic style may be most prevalent in organizations that promote collectivistic leadership that encourage and establish norms for Dynamic role switching (Pearce & Conger, 2002; Yammarino et al., 2012).

7.4.2. *Leader-Stasis Style*

Individuals with the Leader-Stasis style are high on leader and low on follower orientations. Whereas these individuals may occasionally engage in LFS, the degree of their switching is more static in comparison to individuals with the Dynamism style. On balance, Leader-Stasis individuals tend to enact and sustain leadership roles more often than they do followership roles. Within organizational contexts, senior-level executives may possess this style given the frequency in which they are required to enact leader roles. Although the leader role is the stasis point, individuals who possess the Leader-Stasis style may at times switch to a follower role. For example, when interacting with the CEO, senior-level executives may take on a more subordinate role. However, enacting the follower role does not reflect their genuine tendency, and they revert back to their leader-stasis point naturally.

7.4.3. *Follower-Stasis*

Individuals with the Follower-Stasis style are high on follower and low on leader orientations. As with the Leader-Stasis style, individuals with the Follower-Stasis style may occasionally engage in LFS, although the degree of switching is more static compared to individuals with the Dynamism style. In contrast to the Leader-Stasis style, individuals with the Follower-Stasis style tend to enact and sustain followership roles more often than they do leadership roles. Within organizational contexts, entry-level employees and those in the lower hierarchy of the organization are likely to possess this style because they may lack certain skills and experiences to enact leadership. Moreover, organizational policy and norms (e.g., job descriptions with explicit roles and responsibilities) may formally constrain them to the follower-stasis point (DeRue & Ashford, 2010). Indeed, the Follower-Stasis style may be the default stasis point for most entry-level employees (Pillai & Uhl-Bien, 2007).

7.4.4. *Capsulation*

Individuals with the Capsulation style are low on both leader and follower orientations. These individuals tend not to perceive themselves as either leaders or followers, and consequently are less likely to enact these roles. Capsulation individuals do not prefer to supervise others nor do they prefer to be supervised. Consequently, they are the least Dynamic of the four styles in terms of engaging in LFS. In organizational contexts, they are likely independent contributors who are valued for their technical expertise. They may be capsulized in their role as technical experts and shielded from the responsibilities of leadership and followership. An example of Capsulation includes IBM Fellows. These individuals are able to pursue technical innovation without the necessity of supervision or to supervise others ("IBM Awards Highest Technical Honor," 2013).

7.5. Research Agenda

Having explicated the theoretical foundation of LFS, we propose an agenda for investigating this novel construct. Our discussion is not meant to be exhaustive. Rather, we focus on those that are most pressing and germane to LFS. In particular, we focus on assessment, antecedents, and outcomes of LFS, which include person and environmental variables that affect LFS.

7.5.1. *Operationalizing and Assessing LFS*

An immediate first step is the development and validation of an instrument for assessing LFS. Our conceptualization of LFS points to two domains of assessment. The first domain concerns the general process of LFS, targeting degrees of role switching. As noted above, a central question is the degree to which individuals engage in LFS. Moreover, consistent with our conceptualization, an assessment of LFS should encompass both self-schemas (e.g., identification with leader and follower schemas) and behavioral enactment. Our emerging research provides some empirical evidence. We asked adult workers to self-report their experience with LFS, targeting the extent of switching (e.g., "At work, how many times do you think you switch between follower and leader roles?"). In addition, we also inquired about individuals' behavioral enactment of these roles (i.e., the degree to which they behaviorally perform these roles) (e.g., "Depending on the situation, I sometimes take the lead while in a group and sometimes I follow."). Our preliminary research indicates 72 percent of employees reported switching between leader and follower roles three or more times per day on average while at work. In addition, 92 percent of employees reported switching between leader and follower roles on a weekly basis. Our preliminary evidence provides support for the LFS construct, indicating the majority of individuals engage in LFS.

Beyond survey assessments, LFS should be investigated in experimental settings. Experimental research can address the degree to which individuals engage in LFS. Moreover, experimental research can address questions beyond the limitations of surveys, such as if there are any sequencing effects for LFS. For example, how difficult is it for individuals to enact a leader role when they previously enacted a follower role and vice versa? It may be that once individuals enact a follower role, they are prevented from switching and enacting a leader role because others may continue to perceive them as a follower (DeRue & Ashford, 2010). Similarly, individuals may not be able to shift their self-schemas (as a leader or follower) in the same environmental context (e.g., same group member composition, same task) and

may require a shift in environmental context for further role switching to occur (Hanges, Lord, & Dickson, 2000). Thus, the development of a survey instrument is crucial to investigating LFS in the field, which is complemented by experimental research that can address questions beyond the limitations of field survey methodology.

The second domain of assessment concerns the four LFS styles. Whereas the first domain assesses the degree to which individuals engage in LFS, the second domain assesses their stylistic orientation. Thus, individuals may role switch often (frequency) and yet vary in their stasis point such that an individual with a Leader-Stasis style may spend more time (duration) enacting the leader role, whereas an individual with a Follower-Stasis style may spend more time enacting the follower role. Because the LFS styles are conceived along two dimensions, it may be best to avoid the use of bipolar unidimensional scales. For example, a unidimensional scale item may be "Which role (leader vs. follower) do you often perform at work?" and the response choices may be *1 = mostly follower, and 5 = mostly leader*. Unidimensional scales may be problematic because they may equate endorsement for one dimension (e.g., leadership orientation) to a lack of endorsement for the other dimension (e.g., followership orientation).

Accordingly, a bidimensional scale, where leader and follower orientation is measured in two separate scales, may best capture the four LFS orientations. For example, a respective scale item for the leader and follower orientations could be "How often do you perform the role of leader?," and "How often do you perform the role of follower?" and the response choices can range from *1 = not often* to *5 = very often*. LFS styles would be determined by individuals' relative scores on these two dimensions. For example, the Dynamism style would be reflected by scores one standard deviation above the mean on both dimensions. Similarly, the Leader-Stasis style would be reflected by scores one standard deviation above the leader orientation dimension and one standard deviation below the follower orientation dimension.

Alternatively, each of the LFS styles may be directly assessed. Such an instrument would include four scales with items capturing the Dynamism, Leader-Stasis, Follower-Stasis, and Capsulation styles. For example, a respective scale item for the Dynamism and Leader-Stasis styles may be "I perform the role of leader and follower equally" and "I tend to perform the role of leader more often than the role of follower." Individuals would receive a score on each scale, and their highest score on a specific scale determines their LFS style.

7.5.2. Antecedents of LFS

7.5.2.1. Implicit theories

Implicit theories of leadership and followership may influence the frequency of role switching, as well as LFS styles. Implicit Leadership Theories (ILTs) and Implicit Followership Theories (IFTs) reflect lay people's shared schemas of leadership and followership, respectively (Epitropaki et al., 2013; Lord & Maher, 1991; Sy, 2010).

ILTs and IFTs serve as a sense making function to understand and respond to leaders and followers. For example, individuals possessing characteristics that match lay people's ILTs are more likely to be judged as leaders and consequently, afforded the discretionary power to lead (Epitropaki & Martin, 2005). Similarly, followers possessing characteristics that match lay people's conception of a good follower (IFTs) are more likely to receive favorable treatment (Whiteley, Sy, & Johnson, 2012). ILTs and IFTs represent subjective realities and perceptions, which are powerful determinants of behaviors even in the presence of objective facts and evidence (Lewandowsky, Oberauer, & Gignac, in press).

We posit that individuals' implicit theories may influence the degree to which they switch, as well as shape their LFS style. Specifically, individuals may develop endorsements for certain implicit theories over time (Hanges et al., 2000; Sy, 2010, 2011) such that the endorsed theories are more easily and frequently activated. Consistent with the Perception-Behavior Link, the frequency of ILTs and IFTs activation will correspond with the frequency of leader and follower role enactments, respectively. Thus, individuals who have internalized more ILTs relative to IFTs are more likely to exhibit a Leader-Stasis style. Conversely, individuals who have internalized more IFTs relative to ILTs are more likely to exhibit a Follower-Stasis style.

Another implicit theory relevant to LFS frequency and style is Leadership Structure Schemas, defined as individuals' preference for leadership structure (hierarchical vs. shared leadership) (DeRue & Ashford, 2010). A hierarchical leadership schema views leadership as most effective when enacted by a single leader, whereas a shared leadership schema views leadership as most effective when shared by multiple group members. Accordingly, a shared leadership schema, in comparison to a hierarchical leadership schema, may be associated with more frequent LFS because individuals who possess the shared leadership schema are more willing to share leadership responsibilities. Moreover, a shared leadership schema may be associated with the Dynamism style because individuals with this schema may have internalized norms and expectations that leadership and followership responsibilities are dynamically distributed among group members. In comparison, a hierarchical leadership schema may be associated with the Leader-Stasis and Follower-Stasis styles because the enactment of leadership and followership roles among members are expected to be relatively more static.

7.5.2.2. Leader and follower experiences

Previous opportunities to engage in leader and follower roles may shape LFS styles. For example, a lack of opportunities to enact leadership roles may ingrain a Follower-Stasis orientation overtime. Similarly, an abundance of opportunities to enact leadership roles (e.g., gifted student athletes who are regularly selected to be leaders regardless of the sports activities) may ingrain a Leader-Stasis orientation overtime. Similarly, a lack of opportunities to enact leadership and followership opportunities may ingrain a Capsulation orientation. For example, when given the opportunity, Bill Gates voluntarily relinquished his leadership (CEO) role at Microsoft, and chose the technical role of Chief Software Architect (a new role he

created) perhaps because he naturally possesses a Capsulation orientation fostered during his formative childhood experiences focused on computer programming that was largely devoid of opportunities to enact leader and follower roles (Gates, 1996). In addition to past experiences, current opportunities may also influence individuals' LFS orientations. Thus, organizations that value and offer training as well as opportunities to exercise both leadership and followership enactment may instill a Dynamism style. For example, Gore Industries has a culture that not only fosters proactive followership, but all employees are afforded formal opportunities to lead company initiatives regardless of their formal hierarchical rank and title (Hamel, 2007).

Beyond leader and follower experiences, gender may be another demographic variable that shapes LFS orientation, such that preferences for masculine leadership (e.g., leaders who are male, strong, competitive) may be more associated with a Leader-Stasis styles because both may be related to schemas regarding power and status (Galinsky, Hall, & Cuddy, 2013). Age may also be related to role switching frequency and LFS style, given that older individuals may develop and internalize more diverse self-schemas about their roles as leaders and followers because of their diverse experiences. The frequency and diversity of internalized self-schemas may have a direct correspondence to individuals' flexibility and frequency of leader and follower role enactment (Chartrand et al., 2005; Chen & Bargh, 1997; Dijksterhuis & van Knippenberg, 1998).

7.5.2.3. Organizational context

Organizational hierarchy may influence the degree to which individuals engage in LFS, as well as their LFS style. Organizational hierarchy may dictate the frequency of switching. We noted earlier mid-level managers may engage in more LFS in comparison to senior-level executives and entry-level employees, given the nature and demands of the jobs at the different organizational levels. Thus, we predict an inverted U-shape relationship, such that LFS occurs less frequently at the low and high end of the organizational hierarchy, whereas LFS occurs more frequently at the midpoint of the hierarchy. Organizational hierarchy may also influence LFS style. Specifically, the Follower-Stasis and Leader-Stasis styles may be most frequent at the low and high end of the hierarchy, respectively. The Dynamism style may reside most frequently at the midpoint of the hierarchy.

Beyond hierarchy, organizational culture may influence the degree to which individuals engage in LFS, as well as the distribution of LFS styles. For example, organizations such as General Electric (Tichy & Cohen, 2002) and the United States military that highly emphasize leadership development may foster more Leader-Stasis styles. Similarly, organizations such as Gore Industries and Whole Foods (Hamel, 2007) that emphasize team-based development may foster more Dynamism styles. At a broader level, the degree to which individuals engage in LFS, as well as the distribution of LFS styles may be affected by national culture. For example, differences in collectivism and individualism may shape LFS orientation. Individuals from collectivistic cultures may be more associated with Dynamism and

Follower-Stasis styles because collectivism creates an orientation towards the team (vs. self) and the maintenance of harmony (Venus, Mao, Lanaj, & Johnson, 2012). Accordingly, individuals in collectivistic cultures may have internalized norms to share leadership responsibilities (Dynamism Style) and to accommodate others to maintain harmony, such as adopting a Follower-Stasis style so that others may lead.

7.6. LFS and Work Outcomes

How do LFS impact workplace outcomes? What is the relationship between the LFS styles and workplace outcomes? Research suggests that individuals who can successfully integrate multiple self-schemas (e.g., see themselves as both leaders and followers) tend to have better outcomes (Berry et al., 2006). Extrapolating from this research, it would seem feasible to reason that individuals with Dynamism styles may be associated with more positive work outcomes because these individuals may possess more flexible attributes, allowing them to be more adaptive and successful. Moreover, given societal preference for leadership, individuals with Leader-Stasis styles may also be associated with positive work outcomes because this style may manifest behaviors and goal pursuits (pursuing promotions and career opportunities) that are congruent with societal ideals, and therefore rewarded (Meindl, Ehrlich, & Dukerich, 1985). Conversely, Follower-Stasis styles may be negatively associated with work outcomes because this style may manifest behaviors and goal pursuits that are incongruent with societal ideals (Pillai & Uhl-Bien, 2007), and therefore lack rewards. To the extent that Capsulation styles reflect a focus on technical expertise, this style may be positively related with technical task performance. Simultaneously, given the lack of focus on leadership, Capsulation styles may have a negative or neutral relationship with leadership outcomes. Beyond these general patterns, we discuss the relationship between LFS and specific workplace outcomes below.

7.6.1. Job Satisfaction

LFS may require diligent monitoring of one's environment and the need to continuously adapt to the demands of the environment. Consequently, LFS may negatively impact job satisfaction to the extent that role switching is mentally taxing. Occupation type may dictate the degree that one engages in LFS, and thus may also play a role in the relationship between LFS and job satisfaction. For example, occupations in the service industry that require more contact with people of differing supervisory levels may require more switching than occupations in the manufacturing industry that involve more contact with machinery and technology. Thus, service jobs may lead to less job satisfaction than do manufacturing jobs to the extent that jobs in the service industries require more LFS that is more mentally taxing. However, the relationship between role switching and job satisfaction may be

moderated by LFS orientation. Individuals with Dynamism styles may not only find role switching not mentally taxing, they may find it energizing. Conversely, these same individuals may have lower job satisfaction when their natural preference for dynamically switching between leader and follower roles is not accommodated by their occupation. All this suggests that job satisfaction may be determined by the fit between LFS orientation and individuals' occupations.

7.6.2. *Relationship Quality*

LFS styles may have implications for relationship quality (e.g., LMX) (Graen & Uhl-Bien, 1995). Specifically, congruence in leader and follower endorsement for LFS styles may impact the quality of relationships. When leaders' and followers' LFS styles are congruent, relationship quality is high because the expectations of both parties are met. For example, when leaders and followers possess Dynamism styles, relationship quality will be high when both parties share the leadership responsibilities that each expect from the other. Conversely, relationship quality may be low when LFS styles are incongruent. For example, relationship quality may be low when followers possess a Dynamism style and leaders possess a Leader-Stasis style because leaders are not likely to offer followers opportunities to lead, and the unmet expectations of followers to share leadership responsibilities may result in follower dissatisfaction with their leader. Alternatively, followers with Dynamism styles may attempt to assume leadership responsibilities, which may be interpreted as a form of insurrection for those who hold a Leader-Stasis style.

7.6.3. *Leadership Effectiveness*

Leadership effectiveness is a function of leaders' ability to influence followers (Yukl, 2001), and the ability to influence followers is partly based on followers' perceptions of their leaders (Epitropaki et al., 2013; Lord & Maher, 1991). Specifically, followers possess schemas regarding the norms and expectations for leaders. Research has consistently shown leaders who best resemble these norms and expectations are afforded the power and discretion to lead effectively (e.g., Hogg, 2001; van Knippenberg, & Hogg, 2003). Individuals who do not resemble these norms and expectations may not be viewed as leaders and consequently, they have little influence over others. In line with this logic, leaders may have more influence over followers to the extent that leaders' LFS styles match that of followers (i.e., leaders' and followers' LFS styles are congruent). For example, followers who endorse the Dynamism style may expect leaders to share leadership responsibilities with them. Individuals who match followers' expectations (i.e., leaders enact a Dynamism style and share leadership responsibilities) are thus viewed as more leader-like and afforded influence by followers. Conversely, followers who endorse a Leader-Stasis style may not have such expectations to share leadership responsibilities, and such attempts to share leadership may be viewed as leaders' shirking their leadership responsibilities. Such a perception would render the leader ineffective. In short, much can be gained by examining the relationship between LFS orientation and leadership effectiveness.

7.6.4. *LFS and Extant Leadership Theories*

An interesting line of research could examine the relationship between LFS and extant leadership theories. It is important to investigate the degree of LFS with extant leadership theories given some theories seemingly have presumed a static view of leadership and followership. To the extent that this presumption is violated, these leadership theories may require further revision. As such, much can be gained by challenging the presumption of a static view of leadership and followership. In addition, it is possible that certain LFS styles may shape the type of leadership individuals enact. For example, individuals with Dynamism styles may be more likely to enact Shared Leadership (Pearce & Conger, 2002) and Transformational Leadership (Bass & Riggio, 2005) because these both theories hold a positive view of leaders and followers as valued contributors, whose contributions come in the form of leadership and followership. Similarly, individuals with Leader-Stasis styles may be more likely to enact Paternalistic leadership (Pellegrini & Scandura, 2008). In short, further insights may be gained (e.g., surfacing hidden assumptions about the Dynamism of leader and follower roles) by directly investigating the relationship between LFS and extant leadership theories.

7.7. Conclusion

In this chapter, we have proposed a novel construct on LFS. We delineated the key theoretical tenets of LFS. First, LFS is predicated on the premise that individuals possess schemas for leader and follower roles (i.e., implicit theories of leadership and followership) (Epitropaki et al., 2013; Lord & Maher, 1991; Sy, 2010) and role switching involve the activation of these schemas. Second, LFS may be a function of individual differences (i.e., the four LFS styles) and context (e.g., contextual cues trigger leader and follower schemas). Third, LFS encompasses behavioral enactment (i.e., individuals behaviorally enact the leader or follower roles that are mentally activated) that is explained by the Perception-Behavior Link. Fourth, LFS processes can operate in controlled (conscious) or automatic (preconscious) fashion. Having explicated the theoretical foundation of LFS, we propose an agenda for future research, focusing on assessment, antecedents, and outcomes of LFS. Preliminary research on LFS is underway, with evidence indicating that the majority of adult workers (92%) engage in LFS. The prevalence of LFS suggests it may correspondingly have equally wide impact in the workplace. We hope our discussion has been sufficiently stimulating such that readers will make the switch to focus their research and intervention efforts on LFS.

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