Situational leadership

Overview and conversation guides per style

Situational leadership is a leadership model developed by Paul Hersey and Ken Blanchard. Effective leadership depends on the situation: you adapt your style to the other person's competence and commitment, for a specific task. The basic theory is easy to find online; in this download you will find our practical translation of it into conversation guides.

LEVEL OF CAPABILITY AND STYLE

The level of capability is the combination of competence and confidence or commitment for a specific task. It says nothing about the person in general or as a human being; you reassess it in every situation.

LC	COMPETENCE (CAN)	CONFIDENCE, COMMITMENT (WANT, DARE)	STYLE
1	No relevant experience, does not possess the required knowledge, limited notion of the task at hand.	Low urge to perform, not very dedicated to the task, holds back in taking responsibility.	S1 Instructing
2	Insufficient relevant experience, does not yet possess all the knowledge, more or less understands the task at hand.	Strong will to take responsibility, enthusiastic, high urge to perform.	S2 Coaching
3	Has relevant experience, possesses all the required knowledge.	Variant A (confidence, dare): hesitates to take on full responsibility and does not mobilise. Variant B (motivation, want): does not want the responsibility, does not feel fully involved.	S3 Supporting
4	Has relevant experience, possesses all the knowledge, understands what needs to be done.	Strong will to take responsibility, high urge to perform, very dedicated to the task.	S4 Delegating

Quick check between LC2 and LC3: can he or she do the task (LC2)? Does he or she want to and dare to do the task (LC3)?

TIPS

- No variation in style means no development. Dare to shift to a different style if the situation demands it.
- Give responsibility: correcting mistakes resulting from boredom leads to a further decrease in quality.
- In general, using a style that is too low for the situation is more harmful than a style that is too high: the team member experiences it as patronising.

NOTES

CONVERSATION GUIDE S1 INSTRUCTING

A team member cannot perform a task because he or she does not have sufficient knowledge and experience. You assist by offering knowledge or expertise. The instruction can also be given by an experienced team member; the approach below applies in that case too.

PHASE	STEPS AND RECOMMENDATIONS
Preparation	Think about the knowledge and skills the team member requires to execute the task. Evaluate the team member's current knowledge and skills. Compare these two levels and decide which strengths and weaknesses of the team member you would like to focus on. Analyse the content of the instruction: how can you divide it into parts, and what are the most important points in each part?
Starting	Explain what you want to do and in which order you will cover it. Explain what you expect from the team member and what he or she can expect from you. Explain how much time this will take.
Introduction	Briefly state the intention of the task and why it needs to be carried out. Do not elaborate too much on background and history.
Instructing	Work according to 'Tell-Show-Try': explain the task, demonstrate it and have the team member try it him- or herself. Never ask 'Did you understand?', but instead ask 'Do you have any questions so far?'
Closure	Have the team member repeat the full instruction once more, then add anything he or she has left out. Assure the team member that he or she can always come back if anything is still unclear. Express your confidence. Create opportunities to practise, preferably in the daily work.
Afterwards	Regularly show your interest. It is easier for you to take the initiative for follow-through than it is for the team member.

CONVERSATION GUIDE S2 COACHING

A team member does not yet possess all the knowledge and skills and makes mistakes as a result. You give feedback on the execution. It is very important that the team member's motivation is restored.

PHASE	STEPS AND RECOMMENDATIONS
Preparation	Carefully observe the team member in action. What should he or she do differently? Make sure you can describe this specifically and factually, with multiple examples.
Starting	Start by expressing your appreciation for the team member's efforts. Sum up the topics in a neutral way and ask whether the team member would like to put topics on the agenda as well. Together, agree on the order of the topics. Mention that you intend to help the team member improve, not to 'grade' him or her.
Feedback	Immediately share the problem you observed, with one or more examples described as specifically as possible, following the rules of feedback. Ask whether the team member can recall the examples. Be understanding about the mistakes made.
Receiving the reaction	Ask the team member why he or she acted this way. Do not interrupt; listen carefully, dig deeper and summarise. Do not interpret and do not debate. Find out what knowledge or experience is missing.
Coaching	Limit the number of topics per conversation. Explain how the task should be executed, why, and what the consequences for others are if it stays this way. First ask questions and make suggestions; only after that, explain. Main question: how are you going to solve this? Appreciate correct answers and follow up on ideas. Together, decide the next actions. Strive for acceptance instead of capitulation.
Closing	Summarise how the task will be executed in the future. Schedule when you will meet again to exchange experiences. Ask how the team member experienced this meeting and share your appreciation for his or her attitude.

CONVERSATION GUIDE S3 SUPPORTING

A team member does possess the knowledge and skills, but is reluctant or hesitant. This conversation requires patience and conversation skills to dig deeper into the underlying problem. A common pitfall is to switch to coaching out of impatience. So plan enough time and prepare well.

PHASE	STEPS AND RECOMMENDATIONS
Preparation	Which signals point to a lack of commitment or confidence? Take your time, in a place where you will not be disturbed.
Starting	Make sure the team member feels secure. State that you want to talk about how the team member views his or her work, and show genuine interest in this. Also check what topics the team member would like to discuss. Be prepared to come to a solution that is acceptable to both of you.
Analysing the problem	Ask what is going on, state that you feel the team member is not satisfied (with examples) and that this makes you feel concerned. Allow the team member to explain the problem; listen carefully, dig deeper and summarise. The aim is to understand the team member, not to establish who is right. Never belittle the problem and do not debate. Do not defend yourself in case of criticism; instead, ask how the team member would like you to do your job. Come to an agreement about the problems and the order in which to solve them.
Searching for possible solutions	Let the team member find solutions him- or herself as much as possible, and hold back from commenting on the practicalities. Together, look for the best solutions and discuss the possible side effects. Only then give your own opinion.
Closing	Summarise the agreements: what will the team member do and what will you do? Check whether the solutions are satisfying for the team member; if not, schedule a new meeting. Constructively let the team member know how you experienced the meeting.

CONVERSATION GUIDE S4 DELEGATING

A team member is motivated and competent. You delegate the task as much as possible, in a partnership that is as equal as possible. Proper delegation also takes time; a common pitfall is to think that it does not require any attention.

PHASE	STEPS AND RECOMMENDATIONS
Preparation	Define the task, mandate and responsibility you wish to transfer. Think about the results you expect: quality, quantity and constraints such as budget and time.
Starting	State that you would like to delegate a task and ask whether the team member wants that as well. Announce that you want to discuss the conditions and come to an agreement about the goals.
Discuss the task	Start by asking which goals the team member intends to achieve and within what timeframe; make them SMART. Ask what obstacles the team member foresees. Only at this point, state the result you expect and the constraints you set. Discuss the differences and each time ask the team member to suggest a solution first. Summarise the agreements.
Discuss your contribution	Ask what role and support the team member expects from you and make agreements about this. Be mindful not to get involved in the execution of the task yourself. Explain that in case of serious problems you will take over the responsibility, to reassure the team member, not out of distrust. Inform everyone concerned of the delegated mandate.
Closure	Agree how and when the team member keeps you updated and reports deviations: the allowance in the mandate. Express your confidence.
Afterwards	Pay attention to the progress and show appreciation for (interim) results. Do not intervene when the team member executes the task differently than you would have done yourself. Ask yourself whether you can support the team member in other ways, without taking over the execution. Celebrate successes.

Model: Paul Hersey and Ken Blanchard. Adaptation and conversation guides: Hart voor Projecten.