



# Succession Planning - It Begins with Understanding Leadership

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## CONTENTS

<b>INTRODUCTION: BEFORE SUCCESSION PLANNING, DEFINE LEADERSHIP</b>	<b>3</b>
<b>POPULAR APPROACHES TO LEADERSHIP</b>	<b>4</b>
TRAIT APPROACH	4
SKILLS APPROACH	5
STYLE APPROACH	5
SITUATIONAL APPROACH	5
CONTINGENCY THEORY	6
PATH-GOAL THEORY	6
LEADER-MEMBER EXCHANGE THEORY	7
TRANSFORMATIONAL LEADERSHIP	7
TEAM LEADERSHIP	7
PSYCHODYNAMIC APPROACH	8
ADAPTIVE LEADERSHIP	8
SERVANT LEADERSHIP	9
AUTHENTIC LEADERSHIP	9
RELATIONAL LEADERSHIP THEORY	9
COMPLEXITY LEADERSHIP THEORY	10
<b>THE BRIL MODEL OF LEADERSHIP: A BALANCED APPROACH</b>	<b>11</b>
SELF-INTELLIGENCE AND SELF-DEVELOPMENT FOR LEADERSHIP	12
RELATIONAL INTELLIGENCE AND RELATIONAL PRACTICE FOR LEADERSHIP	13
CONTEXTUAL INTELLIGENCE AND CONTEXTUAL SENSITIVITY FOR LEADERSHIP	13
REFLECTIVE INTELLIGENCE AND REFLECTIVE PRACTICE FOR LEADERSHIP	14
<b>CONCLUSION</b>	<b>14</b>
<b>ENDNOTES</b>	<b>15</b>

## Introduction: Before Succession Planning, Define Leadership

Succession planning is essential for any business or organization. Identifying people among your employees who can be developed to fill key leadership positions in the future is a great idea that makes good business sense. After all, studies show that promoting from within usually beats external hiring.<sup>i</sup> However, developing potential leaders assumes an understanding of leadership that is all too often lacking in those charged with establishing succession planning. This white paper reviews different ways to define leadership, provides an overview of a variety of approaches to leadership as well as a new leadership model that pulls it all together.

A robust understanding of leadership begins with defining the concept. Many definitions of leadership have been offered over the decades. Joseph Rost, in his seminal work *Leadership in the 21<sup>st</sup> Century*<sup>ii</sup>, noted that a definition of leadership should be “...clear, concise, easily understandable, researchable, practical, and persuasive...” (p. 8). After an exhaustive study of 20<sup>th</sup> Century leadership literature he concludes, “Leadership is an influence relationship among leaders and followers who intend real changes that reflect their mutual purposes” (p. 102). Rost goes on to “unpack” the essential features of the definition which include the following: the relationship is between leaders and followers, both of whom are active; it is based on influence that is both multidirectional and non-coercive; the intended changes are multiple, substantive and transforming, but not necessarily ever achieved; mutual purposes are developed together, are bigger than goals, are not necessarily ever realized, and become common purposes.

Using his own criteria, however, the definition falls short on several counts. The essential elements contained in the definition require a total of thirteen sub-points spanning more than ten pages to elucidate. Thus, the definition fails to be *concise*, nor is it *easily understandable* or even *practical*. The definition does qualify as relatively clear (though complex), researchable, and persuasive.

Peter Northouse (2007) in his useful primer *Leadership: Theory and Practice*<sup>iii</sup>, offers the following definition: “Leadership is a process whereby an individual influences a group of individuals to achieve a common goal” (p. 3). Essential features of this definition include the following: Leadership as a process goes beyond traits or characteristics residing in the leader to a transactional even between the leader and the followers in which each is affected by the other such that leadership is available to all and not just formally designated leaders; leadership is concerned with how the leader affects followers through the use of influence; there can only be leadership in group contexts; the group of individuals being influenced has a common purpose; leadership is about goal attainment in that the influence is directed towards some task, end or achievement.

Although the Rost and Northouse definitions are quite similar and touch upon many of the same essential components, there are also several important differences. The Rost definition is generally more precise and robust. Northouse has not hit

upon anything additional, and has missed a few items that seem important in the Rost definition. Rost seems to suggest a fuzzier or more flexible border between leaders and followers than does Northouse. Rost is more precise in his use of *purposes* rather than *goals*, although Northouse appears to consider those terms synonymous. Northouse does not allow for the notion of multiple leaders in any given leadership situation. Rost does well to emphasize the fact that leadership cannot be separated from the notion of *change*, which is lacking in the Northouse definition.

Ronald Heifetz, in his book *Leadership Without Easy Answers*<sup>iv</sup>, offers a criticism of the Rost definition that would also apply to the Northouse definition. He argues that many leadership scholars who think they are offering up value-free definitions or descriptions of the objective reality of leadership are in fact espousing value-infused perspectives, the values being more or less implicit (pp. 285-286). For example, Rost clearly states that coercion cannot be a part of leadership, but influence can. Surely there comes a point, however, where it might be difficult to define where influence becomes coercion. Heifetz ends up defining leadership as *action to mobilize adaptation* (p. 27). One feature that is good about this definition is how easily *adaptation* can be interpreted as change, which goes hand in hand with leadership. And yet it begs the question, does leadership always have to be about change? What if leadership was needed to maintain a status quo, to *not* change? Would it not still qualify as leadership? Heifetz, in fleshing out what he means by adaptive work, eventually explains that, according to his definition, what Hitler did in Nazi Germany could not be called leadership. He falls prey to the very same criticism he leveled at Rost and other scholars.

A final definition of leadership comes from Richard Couto<sup>v</sup>: *Taking initiative on behalf of shared values and for the benefit of others*. This definition meets all the criteria laid out by Rost for a definition of leadership. It is very clear, concise, easily understandable, researchable, practical, and persuasive. It is a value-free definition, describing what leadership is, not what it should be. Where the values need to come into play is when one is evaluating or assessing the *quality* of leadership provided by leaders. The notion that leadership must be defined in such a way that what Hitler did in Nazi Germany cannot be called leadership reflects . He took initiative on behalf of shared values for the benefit of (some) others, so it was leadership. It was also very bad leadership by any sane criteria used to assess it.

## Popular Approaches to Leadership

This section summarizes a number of different approaches to leadership. Each has its strengths and deficiencies, but any one of them may represent a good fit with your organizational culture.

### Trait Approach

The trait approach attempts to identify the personality attributes of effective leaders. Such traits typically include intelligence, self-confidence, determination, integrity, and sociability. One problem is that although mountains of research

have been produced on leadership traits, there is still no agreed upon definitive set. Another problem is that traits are considered relatively fixed psychological features, which means leaders cannot really be developed or trained. Weighing in on the age-old nature/nurture debate, the trait approach falls squarely in the nature camp. One is either born to be a leader, or not.

## Skills Approach

This approach, while recognizing that personality attributes do play a role, argues that there are also developable skills that leaders need to have. The skills model has three primary components: *Competencies* including problem-solving skills, knowledge, and social judgment skills (such as perspective taking or social intelligence, social perceptiveness, behavioral flexibility, and social performance); *individual attributes* including general cognitive ability, crystallized cognitive ability, motivation, and personality; and *leadership outcomes* including effective problem solving and performance. The leadership outcomes are the way to evaluate leadership effectiveness, which belies the approach's emphasis on problem-solving skills. *How* the components lead to leader effectiveness, however, is not explained by the theory. It should also be noted that this model was developed from military personnel and their performance in the armed services, calling into question the generalizability of the approach.

## Style Approach

In the style approach, leadership behaviors generally fall into two primary categories: those focused on tasks (whatever it is the organization seeks to accomplish) and those focused on relationships (helping subordinates feel comfortable with themselves, each other, and the given situation). Some scholars have alternatively called these two categories *concern for results* and *concern for people*, *initiating structure* and *consideration*, or *production orientation* and *employee orientation*. The research in this approach has focused on describing how leaders behave, offering a way to assess one's own style, as well as to identify what style might be most effective, although the evidence on the lattermost point has been considered inconclusive. It does not have a strong situational component, and it is descriptive rather than prescriptive.

## Situational Approach

This theory suggests that leadership needs to be tailored to the situation as defined by the changing needs of subordinates. The primary dimensions of leadership are composed of *directive* behaviors (to accomplish goals and achieve objectives) and

*supportive* behaviors (helping subordinates feel comfortable with themselves, each other, and the given situation). Subordinates are assessed as to their level of *competence* and *commitment* for a given task, and the leader must then match the correct corresponding style to that situation. It is more prescriptive than the other approaches listed above.

## Contingency Theory

This approach holds that the key to effective leadership is matching a leader's style to the correct setting. As with the style and situational approaches, leadership styles can be categorized as *task motivated* or *relationship motivated*. How it differs from the situational approach is that it greatly expands the concept of the situation beyond just the developmental level of subordinates to include *leader-member relations* (good or poor), *task structure* (high or low), and *position power* (strong or weak). Based on the diagnosis of the situation this theory will say which leadership style best fits that situation. The model suggests that when situational variables are extreme (either very smooth or very rough), task motivated leadership will be more effective than relationship motivated leadership. If the situational variables are moderate (things are neither totally out of control nor completely in control), relationship motivated leadership will be more effective than task motivated leadership. Interestingly enough, however, if there is a mismatch between the leadership style and the situation, the theory does not ask the leader to change or adapt their style to the situation (because leadership style is related to personality), rather the situation should be re-engineered to better fit the leader's style. In this approach, it becomes important for organizations to try to put the right leaders into the right situations.

## Path-Goal Theory

This approach focuses on leadership to motivate subordinates to accomplish goals. It is once again a matching model, this time emphasizing the relationship between leadership style, subordinate characteristics, and the setting. It incorporates expectancy theory by acknowledging that employees will be motivated to do something if they think they are capable of doing it, if they can achieve a certain outcome, and if the payoff for doing it is worthwhile. The leader must help subordinates by filling in what is missing from the environment, and compensating for any deficiencies in their abilities. Although the leader needs to be familiar with subordinate characteristics, it is still heavily leader-centric, placing the onus on leaders to fill in everything employees need to achieve goals. Leadership behaviors described in this approach include both *directive* and *supportive* leadership (similar to previous theories), but adds in *participative* leadership in which the leader invites subordinates to participate in decision making, and *achievement-oriented* leadership that challenges subordinates to work the highest possible level.

## Leader-Member Exchange Theory

The focus of this approach is to highlight the relationship that occurs between a leader and each follower. The prescriptive part of this approach indicates that leaders should strive to develop high-quality exchanges with each follower. These exchanges develop over time from stranger to acquaintance to mature partnership. The leader must look for ways to develop high-quality relationships of trust, respect, and obligation with each follower so that their motive changes from self-interest to the good of the organization. The model is weak, however, in explaining just how this is to be accomplished. The descriptive component of the model is very accurate in describing how leaders make more use of some followers (who become the “in-group”) and less of others (who become the “out-group”).

## Transformational Leadership

Transformational leadership focuses on how visionary, charismatic leaders are able to understand the needs and motives of followers, connecting with them in a way that helps them to reach their fullest potential. In the process, both the leader and follower are transformed to new levels of motivation and morality. More specifically, transformational leaders are strong role models, highly moral/ethical, inspire others to rise above self-interest, encourage creativity and innovation, are highly attentive to followers’ needs, offer a clear vision, create trust, recognize the need for and precipitate change, and finally institutionalize that change. As a leadership theory, it is very close to being a change model, clearly viewing leadership and change as inextricably bound together. On the nature/nurture debate, transformational leadership swings the pendulum back towards the nature end of the spectrum in that it depends to some degree on the charisma of the leader. It is a leader-centric approach, for in spite of part of the model being about the needs of followers, it is still centered on the leader doing things to move the followers. Transformational leadership is often contrasted with *transactional* leadership, which rather than focusing on the needs of subordinates or their personal development instead trades rewards and/or punishments for desired behaviors. In even greater contrast is *laissez-faire* leadership, which is essentially the absence of any leadership.

## Team Leadership

The team approach has become very popular, begging the question of the role of team leadership to effective teams. Two critical components of team leadership are *team performance* (task focus) and *team development* (relationship focus). Team leadership must constantly focus on both to make an effective team. The model recognizes the importance of paying attention to both the internal environment (the task and relational needs of the team) and the external environment (to which the team must adapt), and the need to know when to react by changing or staying the course. Key to this approach is skill in continual diagnosing, and having a repertoire of interventions when action is needed. The eight characteristics of

effective teams that leaders must achieve are 1) Clear, elevating goal; 2) Results-driven structure; 3) Competent members; 4) Unified commitment; 5) Collaborative climate; 6) Standards of excellence; 7) External support and recognition; 8) Principled leadership (willingness to confront inadequate performance; not being too easy-going; personal commitment to team goal; allow member autonomy).

## Psychodynamic Approach

The emphasis in this approach is self-knowledge for leadership and followership. The point here is not to match behaviors and styles to particular situations or subordinate needs, but to achieve a high level of self-understanding, and thereby understand how one responds to others. The influence of psychotherapy is strong in this approach, which advocates understanding of one's family history, maturation or individuation, and any number of other psychological concepts. It is essentially an understanding of leadership through the concepts and language of psychology. By understanding the psychological dynamics at play, one can then learn to avoid or change unwanted patterns of behavior and reactions, as well as better understand the behaviors and motivations of others, especially their reactions to you. A basic problem with this approach is that most psychological theories and concepts were developed by studying people with serious difficulties, and are also very subjective based on the researcher's own biases (including culture and social class). The psychodynamic approach also largely ignores various organizational factors.

## Adaptive Leadership

In this approach, Heifetz<sup>vi</sup> draws a basic distinction between routine or *technical* challenges and *adaptive* challenges. The latter tend to be systemic problems with no easy answers, problems that challenge deeply held beliefs and values, and that involve a variety of legitimate but competing perspectives. Dealing with adaptive challenges requires leadership that does six specific things: 1) *Getting on the balcony* to get the big-picture view of what is happening, and to be able to move from the field of play to the balcony and back; 2) Identifying the adaptive challenge by looking closely at root causes of systemic problems; 3) *Regulating distress* by creating a "holding environment" in which adaptive work can safely take place, setting direction by framing the key questions, protecting by managing the rate of change, orienting by defining realities and key values, instilling conflict as a means to creativity, and shaping norms, all the while maintaining presence and poise, including the emotional capacity to tolerate uncertainty, frustration, and pain; 4) *Maintaining disciplined attention* to the adaptive challenge, involving everyone with their different experiences, assumptions, values, beliefs, and habits (which many people would rather avoid through scapegoating, denial, etc.) by asking the right questions, reframing the debates, and unbundling issues; 5) *Giving the work back to the people* in order to avoid the tendency of leadership to offer solutions which by rights should come from the people, empowered by the leader to participate in solving the problem; 6) *Protecting voices of leadership from below* by making sure all the stakeholders can participate, even those that seem difficult or that are often

otherwise excluded.

## Servant Leadership

This approach, summarized by Smith, Montagno and Kuzmenko<sup>vii</sup> is about placing as much emphasis on followers as can be achieved. A leader first is a servant, and only subsequently is perceived as a leader, typically by the urging of others and not themselves. The true servant leader's primary motivation is to serve, not to lead. Specific skills and characteristics of servant leaders include listening, empathy (recognizing, respecting, accepting, and understanding others), healing (both for oneself and others), awareness (general and self-awareness), persuasion (as opposed to simple positional authority), conceptualization (nurturing abilities and thinking big), foresight (learning from the past, accounting for present realities, and understanding future consequences of decisions), stewardship (holding something in trust for others), helping others develop (eventually to become servants themselves), and building community. Other themes important to this approach include paying particular attention to social justice, making sure the "have-nots" are included, removing inequalities, shifting authority to followers, and in general placing the needs of followers ahead of self interests.

## Authentic Leadership

In this approach, the overriding emphasis is on knowing and being true to oneself. As one group of scholars put it, "Authentic leaders demonstrate a passion for their purpose, practice their values consistently, and lead with their hearts as well as their heads. They establish long-term, meaningful relationships and have the self-discipline to get results. They know who they are."<sup>viii</sup> It begins with understanding one's life story, putting hard work into self-development, and eschewing the need for public acclaim and financial reward in favor of strong intrinsic motivations. Gardner et al<sup>ix</sup> expanded the notion of authentic leadership to include followers who, by following the model provided by authentic leaders, develop into authentic followers and thereby experience heightened levels of trust, engagement, and wellbeing. They also emphasized the relational aspect of authentic interactions between leaders and followers and the eventual achievement of "organizational climates that are more inclusive, caring, engaged, and more oriented towards developing strengths" (p. 367).

## Relational Leadership Theory

This theory, as laid out by Uhl-Bien<sup>x</sup> notes that while many approaches to leadership have placed an emphasis on the importance of relationships (leader-member exchange being the most prominent to do so), they have largely looked at

relationships from a static, dyadic point of view, perhaps attempting to characterize their quality, but not going beyond that. By contrast, relational leadership theory, coming from a distinctively post-modern philosophical base, focuses on the *process* of relationships. It sees leadership and all organizational phenomena as emerging from within relationships and constructed by processes of relating. Leadership becomes the processes by which social order (including attitudes, values, and goals) is constructed and changed. This approach emphasizes the importance of communication in the relational process, as well as leadership being inseparable from the context in which it emerges.

## Complexity Leadership Theory

This approach draws heavily upon complexity science and its implications for leadership. Complexity leadership theory (CLT) recognizes the following three broad forms of leadership:

(1) leadership grounded in traditional, bureaucratic notions of hierarchy, alignment and control (i.e., administrative leadership), (2) leadership that structures and enables conditions such that CAS are able to optimally address creative problem solving, adaptability, and learning (referring to what we will call, enabling leadership); and (2) leadership as a generative dynamic that underlies emergent change activities (what we will call, adaptive leadership).<sup>xi</sup>

CLT highlights the importance of context to leadership, not as an antecedent, mediator, or moderator variable, but as the ambience from which leadership is spawned. Another key feature of CLT is the importance of maintaining flexibility rather than rigidity or control. Leadership must be seen as connective, distributed, dynamic and contextual. *Enabling* leadership becomes the bridge or balancing point between *administrative* leadership and *adaptive* leadership.

From the above presentation of brief sketches of a variety of approaches, the following five themes emerge:

1. Nature/Nurture: Some approaches clearly think of leadership potential as something fixed at birth, while others recognize it as something that can be developed.
2. Many, if not most, approaches are very focused on the leader as an individual. A few of the theories attempt to give some more weight to followers.
3. A surprising number of the approaches have absolutely nothing to say about the context in which leadership takes place. Some provide a very rudimentary consideration of context, and others provide a robust view of context.
4. Some approaches are heavily descriptive, often of leaders rather than leadership, and offer little in the way of prescriptive ideas. Other approaches attempt to do both to some degree.
5. Some approaches focus on the tasks or work of the organization (production), while others recognize that relationships among the people of the organization are important, while still others recognize the importance of both, and some ignore the production/people question altogether.

Because these five themes are present throughout leadership theories, and involve so many fine shades of distinction, there can be no simple grouping of theories into categories that does justice to the inherent complexity of all five themes.

## The BRIL Model of Leadership: A Balanced Approach

The preceding critical review of multiple approaches to leadership served to point out how each approach, when taken as one small, two-dimensional slice through a much larger proverbial pie, embodies imbalances in the various emergent themes of leadership theory. Each approach was also seen, however, to have something important and worthwhile to offer this complex field. Taking such a bird's eye view of so many approaches leads me to the development of an approach based on the previously identified emergent themes. I call this approach Balanced Reflective Intelligent Leadership (BRIL). Descriptively, it includes four spheres of intelligence: Self Intelligence, Relational Intelligence, Contextual Intelligence, and Reflective Intelligence. Prescriptively, these then become arenas for development, practice, and training: Self Development, Relational Practice, Contextual Sensitivity, and Reflective Practice. These elements may be thought of as nested spheres that can be presented visually as concentric circles in Figure 1.

As Figure 1 suggests, self-intelligence is at the core of leadership. From this core, leadership expands into relating to others (relational intelligence), and then expands further to awareness and understanding of the context in which leadership takes place (contextual intelligence). Finally, reflective intelligence is the outermost sphere that encompasses, penetrates, and informs the other three.

Within each sphere of intelligence, there are contrasting elements that must be brought into balance. This balance, however, should not be thought of as some kind of static equilibrium, but a dynamic, ever-shifting harmony based on continual learning and the needs of the situation. The following sections will describe each of the four spheres of the BRIL approach in more detail.

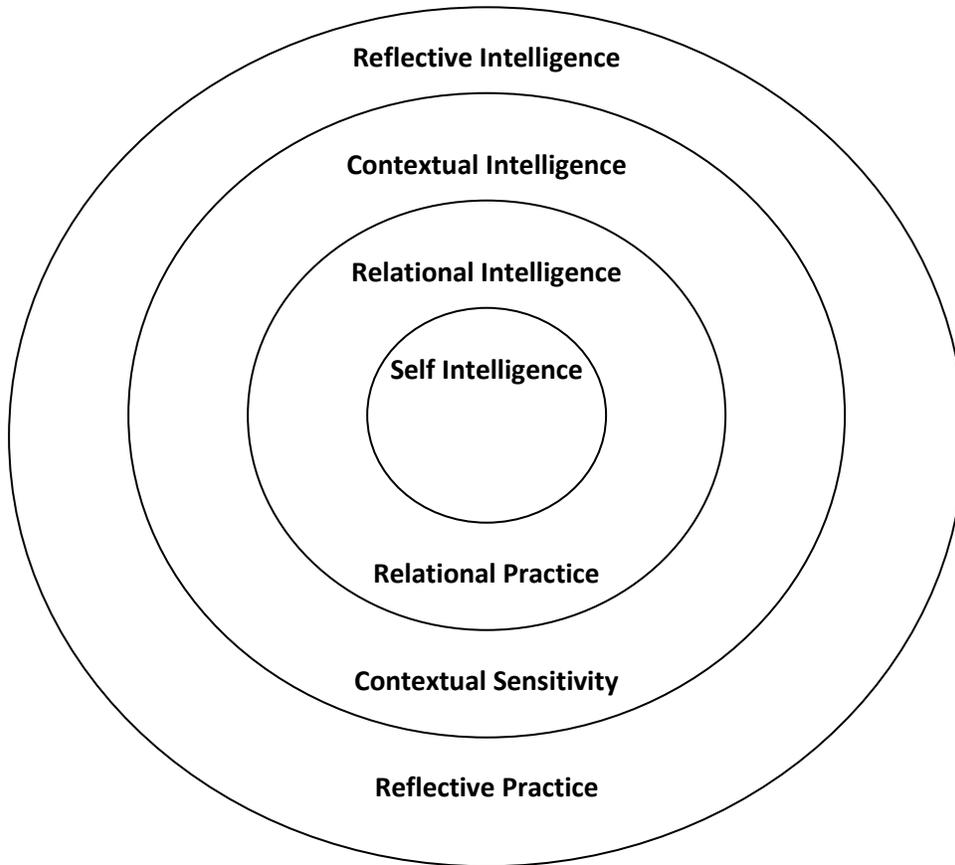


Figure 1. Spheres of intelligence and practice in the BRIL model.

## Self-Intelligence and Self-Development for Leadership

Socrates is one of several ancient Greek sages to whom has been attributed the well-known exhortation to *Know thyself*. Self-knowledge and self-awareness are important features to be incorporated into leadership practice. Clearly, leadership is more than a mere collection of fixed personality characteristics as suggested by the trait approach. Jackson and Parry<sup>xii</sup> summarize the age-old nature/nurture debate this way: “Refreshingly, the conclusion seems to be that it is a 50-50 bet. Yes, heredity and pedigree determine some elements of leadership, but the experiences that we have at home and in life determine our leadership capabilities just as much.” Knowledge of one’s traits can help leaders be more aware of their own limitations as well as their strengths. This sphere of intelligence draws mainly from the *trait approach*, *skills approach*, *psychodynamic approach*, and *authentic leadership*, all of which placed emphasis on self-knowledge. The challenge in this sphere is to achieve balance along the nature/nurture continuum, which can also be thought of as the traits/skills

continuum. On the practical side, any number of psychometric instruments may be taken to achieve a higher level of self-knowledge about one's traits, including the Myers-Briggs Type Indicator® (MBTI®), the PACE™ Palette, the Kolb Learning Style Inventory (LSI), and 360° Feedback. More information about these learning tools is readily available on the Internet, and some can be purchased and taken online. The self-knowledge that is gained, however, must be balanced by an examination of skills. Knowing where one stands on various skill sets is also a useful endeavor. For this aspect of increasing self-knowledge, specific instruments that might be explored include the Leadership Skills Inventory (LSI), Leadership Skills Profile (LSP), and the Emotional Competence Inventory (ECI). Once again, more information on these and other instruments can be readily obtained from the Internet.

## Relational Intelligence and Relational Practice for Leadership

Self-intelligence for leadership, although essential, must be complemented by an exploration of how leaders relate to their peers and subordinates. Most of the assessment instruments referenced above contain explicit information directed at how leaders relate to others, and should be applied in this realm of relational practice as well. The balance sought within this sphere of intelligence is focusing not only on the tasks of the organization, but also the relationships through which leadership occurs (a basic point brought out in the *style approach*). As Jackson and Parry put it (p. 25): "If you strike the right balance between concern for people and concern for production, you will be the most effective leader." Another point of balance to be achieved in this sphere is exhibiting both directive and supporting behaviors (as laid out in the *situational approach*), providing the right mix of both depending on the needs of subordinates and the urgency of production.

## Contextual Intelligence and Contextual Sensitivity for Leadership

Tony Mayo, in his Harvard Business Review blog, explains what he means by *contextual intelligence* this way:

There is far too much focus on individual characteristics of leadership and far too little focus on the situational context. By placing too much emphasis on the individual, we can easily fall prey to the cult of the CEO and believe that any individual who was successful in one setting would naturally be successful in a new setting. The list of once-successful CEOs who have failed in new business settings is long.<sup>xiii</sup>

Leadership theories advanced greatly when they began to take into account the context of leadership, including both internal organizational culture and the myriad external market and other environmental forces applying pressure to leaders and organizations. Leaders must become adept at diagnosing organizations relative to their cultures and the larger

environments in which they operate.

## Reflective Intelligence and Reflective Practice for Leadership

Perhaps the most important sphere of all is reflective intelligence and practice. Without it, leadership cannot increase in effectiveness. Extending and deepening one's self-knowledge, and understanding how one is perceived by and relates to others, and being sensitive to the context in which leadership occurs, will all be an exercise in futility if it is not accompanied by a robust reflective practice. This must involve two different levels of reflection as described by Schön.<sup>xiv</sup> One is called *reflection-in-action*, otherwise known as "thinking on your feet" in which you reflect just enough in a situation that is unfolding to build an understanding that informs your actions, drawing upon both past experiences and current feelings. The other level of reflection is called *reflection-on-action*, which entails carving out a more substantial period of time in which to look back at situation and analyze it on a deeper level. Clearly, the two go hand-in-hand. The challenge, of course, is finding the time in busy schedules for reflection-on-action.

## Conclusion

While succession planning is an essential strategy for any organization, engaging it without a robust understanding of leadership and the many approaches to it that have been developed over the decades will undoubtedly reduce the effectiveness of those efforts.

Think of this white paper as your crash course on leadership theory and practice. While you have the freedom to choose any model that best fits your organizational culture, some approaches are clearly better than others. The BRIL model of leadership presented in this white paper is a more balanced approach that corrects for some of the deficiencies of the traditional approaches.

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