

Theoretical and Practitioner Letters

Academic amnesia and vestigial assumptions of our forefathers

Arthur G. Bedeian ^{a,*}, James G. Hunt ^{b,1}

^a *Department of Management, Louisiana State University, Baton Rouge, LA 70803-6312, United States*

^b *Area of Management, Texas Tech University, Lubbock, TX 79409-2101, United States*

Abstract

In this exchange of letters, Art Bedeian and Jerry Hunt consider what leadership as a concept actually means and whether what has been published in the relevant literature actually deals with leadership per se. Bedeian notes that leadership has been described as (a) synonymous with holding a supervisory or managerial position, (b) the possession of certain personal qualities, and (c) a category of behavior in which an individual acts in a certain manner, thereby influencing others to follow, and wonders if divergent findings regarding the relationship between leadership and other constructs may simply reflect differences in how leadership is defined. Hunt responds to Bedeian by providing a brief history of the literature's treatment of leadership/management differences and arguing for: (1) a framework that helps focus on the different historical-contextual aspects within which one would specifically be called upon to differentiate between leadership and management, and (2) the assumption that leadership is a subset of management, with both needing to be carried out (though not necessarily by the same person) to ensure organizational success. He concludes by articulating ways for researchers to empirically differentiate between leadership and management.

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Letter 1

Professor James G. (Jerry) Hunt
Paul Whitfield Horn Professor of Management
Senior Editor—*The Leadership Quarterly*
Director, Institute for Leadership Research
Rawls College of Business
Texas Tech University
Lubbock, Texas 79409-2101

* Corresponding author. Tel.: +1 225 578 6141; fax: +1 225 578 6140.

E-mail addresses: abede@lsu.edu (A.G. Bedeian), jhunt@ba.ttu.edu (J.G. Hunt).

¹ Tel.: +1 806 742 3175; fax: +1 806 742 2099.

Dear Jerry:

Dave Day and I have recently completed an exchange of letters in which we attempted to square findings from the self-monitoring theory literature with what is known about leadership (Bedeian and Day, 2004). Our exchange was quite helpful in clarifying my thinking about one aspect of the leadership puzzle, but it also brought to the fore a concern that I have long found rather perplexing. Simply put, much of what has been published in the relevant literature doesn't seem to deal with leadership *per se*. Indeed, if truth-in-advertising laws were applied to the leadership literature, it is my belief that the field would be found guilty on multiple counts of false promotion. To wit, in some studies, leaders are defined by formal position and, by extension, followers are taken to be individuals who directly report to them (e.g., Bono and Judge, 2003). Leading is thus treated as synonymous with holding a supervisory or managerial position. In others studies, leadership is a word used to mean the possession of certain personal qualities (e.g., Judge, Bono, Illies, and Gerhardt, 2002). These studies, which may well have their origins in the earliest trait-based attempts to identify leaders, seem to draw upon the notion that leadership springs from a dispositional source. Finally, in some studies, leadership is a word used to describe a category of behavior in which an individual acts in a certain manner, thereby influencing others to follow (e.g., Koene, Vogelaar, and Soeters, 2002). One may reason that as long as researchers are clear about "their" definition of leadership, all is well—a sort of warning for readers akin to a Federal Trade Commission product statement alerting consumers to potential health hazards. Nonetheless, this tendency gives me pause, especially in instances where leadership is defined by formal position.

The notion that leaders can be identified by their location in a hierarchy strikes me as lacking even simple face validity. Occupying or being appointed to a supervisory or managerial position doesn't magically make one a leader. As Zaleznik (1977) noted over 25-years ago, there are crucial differences between managers and leaders. They differ in their attitudes toward goals, their conceptions of work, their relations with others, and their senses of self. This is not a small matter and has obvious implications for both researchers and practitioners. As a researcher who has occasion to access the leadership literature, I have a hard time accepting the idea that occupying a managerial position is a reasonable proxy for leadership. My own personal experience tells me this isn't true.

From an alternative perspective, I wonder how many practitioners have turned to the leadership literature for guidance in developing leaders and have followed recommendations based on studies NOT of "leaders," but rather "managers" that have been mislabeled "leaders" by our academic colleagues. This may on first blush seem harmless. Zaleznik (1977), however, has also argued that, because managers and leaders are different kinds of people, "what it takes to develop managers may inhibit developing leaders" (p. 67). It is thus easy to wonder whether the skepticism of practicing managers concerning developmental recommendations drawn from the leadership literature may in any way be related to their experience with past advice based on studies which were, in effect, investigations of "managership" and not "leadership." In this sense, I find myself agreeing with Kotter (1990) that whereas management complements leadership, it can't replace it.

Studies that draw on leader-member exchange (LMX) theory in particular come to mind. Indeed, its name aside, my read is that LMX theory really deals with relations between "subordinates" and their "supervisors" and NOT "leaders" and their "followers." In fact, the items comprising the LMX-7 measure (Graen and Uhl-Bien, 1995) actually ask "subordinates" to make evaluative judgments about their "supervisors." Sample items from the LMX-7 include "I usually know how satisfied my supervisor is with what I do" and "My supervisor understands my job problems and needs." Where is the "leadership" in these items and how do they tap "leadership" as a content domain? Perhaps even more befuddling is that I'm left wondering how leadership scholars could be so accepting of a theory that equates "supervision" with "leadership" and, in turn, participate as accessories in what amounts to false advertising. What am I missing here?

Believing that leadership is something more than either formal authority or power, I've long felt it seemed more appropriate to just simply say that a leader is "someone who has followers." My thinking, however, recently took a twist. In preparing for my Evolution of Management Thought seminar this past semester, I happened to re-read Mary Follett's 1927 paper "Leader and Expert." In commenting on the "power of leadership," she offered the opinion that "The best leader has not followers, but men and women working with him" (p. 235). Now this is an image that I find particularly appealing.

In that you are someone who has spent his entire academic career studying leadership, I hope that you might rescue me from my state of bewilderment and help me sort through my confusion. In reflecting back on my exchange with Dave, I believe that it is possible that many of the divergent findings regarding the relationship between leadership and

other constructs may simply reflect differences in how leadership is defined. This would especially seem to be a concern in the case of meta-analyses where studies with vastly different conceptualizations of “leadership” have been combined.

Sincerely,
 Arthur G. Bedeian
 Boyd Professor
 Louisiana State University

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Letter 2

Professor Arthur G. Bedeian
 Department of Management
 Louisiana State University
 Baton Rouge, LA 70803-6312

Dear Art:

I appreciate your recent letter concerning what leadership as a concept actually means and especially the difference between leaders and managers or – with a process twist – leadership and management. The leader/manager difference gained considerable impetus after Zaleznik’s (1977) *Harvard Business Review* article and periodically is re-emphasized. A common, but far from only, conceptualization of the differences between the two is that the role of management is to promote stability or to enable the organization to run smoothly, whereas the role of leadership is to promote adaptive or useful changes (Kotter, 1990).

At about the same time, David Segal, a sociologist, wrote a book chapter contrasting leadership and management in the American armed forces. He, too, was concerned about the two terms being used interchangeably. He described leadership as:

Emphasizing interpersonal processes in social groups where some individuals assist or direct the group toward completion of group goals. It is a process characterized by participation on the part of the leader and by affective ties such as respect and loyalty between the leader and follower. Other more abstract and general processes aimed at the fulfillment of organizational goals are not irrelevant, but they are more likely to require management than leadership skills (Segal, 1981, p. 45).

Following those such as Weber (1968a, 1968b) and Janowitz (1960), Segal briefly traced the shift from the highly cohesive lifestyle of the traditional military community to the increasing impersonalization brought about by the

“organizational revolution.” The traditional “mounted warrior” was gradually replaced by the military manager, responsible for a more complex military technology than the mounted warrior. For Segal, the military manager drew upon systems-oriented management strategies, influenced by the human-relations school to get military business completed. For both society at large and the military, Segal (1981, p. 50) argued that there was now, “increased rationalization, greater impersonality, less emphasis on traditional leadership, more emphasis on modern management.”

1. Management Process Literature

Actually, at least for me, the management process literature is also a precursor of the leadership and management split. As you, especially, are aware (see, Bedeian, 1993), that process can be operationalized in terms of the well-known: planning, organizing, staffing, directing and controlling (POSDC) or slight variations within the management-process approach (see, e.g., Bartol and Martin, 1991; Carroll and Gillen, 1987; Hunt and Dodge, 2000). Of the functions just mentioned or perhaps using other related labels such as influencing, motivating, or even leading itself, the directing function is remarkably close to what is often meant by leading. Thus, leading or leadership is seen as one, but only one, important aspect of management.

2. Managerial Work and Behavior

Lest the above notion be seen as quaint by those not supportive of a management-process approach to management and leadership, we can consider the managerial work and behavior literature. The essence of a comparison between leader behavior and managerial work/behavior is well captured by Rosemary Stewart (1982), who was herself at the forefront of the managerial work/behavior movement (see Stewart 1967, 2003). In her 1982 book chapter, she reviews the early works of those such as Sune Carlson (1951) and Tom Burns (1954, 1957) of Burns and Stalker (1961) fame, along with her own work and that of Mintzberg (1973). She points out that the two sets of researchers, leadership and managerial work and behavior (W/B) have traditionally had very little contact with each other. Leadership researchers resided primarily in North America while the managerial W/B scholars tended to be Europeans (Stewart was from England). The former tended to place a heavy emphasis on surveys while the latter used diaries, structured interviews, structured observation, and case studies, and Stewart herself has been described as using a precursor approach to that of grounded theory (Kroeck, 2003; Parry, 2003).

The core of Stewart’s work consists of a deceptively simple model built around “*demands*: what anyone in the managerial job must do, that is cannot avoid doing, without invoking sanctions that would imperil continuing in the job (Stewart, 1982, p. 14)”; “*constraints*: the factors that limit what the jobholder can do (Stewart, 1982, p. 14)”; and “*choices*: the opportunities that exist for jobholders in similar jobs to do different work and to do it in different ways from other jobholders” (Stewart, 1982, p. 14).

Stewart, of course, developed this model in some detail, elaborating on sub-components of each of these D, C, C dimensions. In her piece, comparing managerial W/B and leadership, she argues throughout that each of these dimensions affects the manager’s job and that, in turn, influences the extent to which leadership is called for as well as the particular leadership dimensions to be emphasized.

Indeed, Stewart (1982) mentions her work in the context of Katz and Kahn’s (1978) incremental leadership notion and Hunt and Osborn’s (1982) required and discretionary leadership. In both cases, there are managerial and leadership behaviors required by the organizational system and incremental or discretionary behaviors at the discretion of the manager/leader. For Stewart (1982), her demands roughly correspond to “required” and her choices roughly correspond to “discretionary;” although her demands are more flexible than required behaviors, since role occupants can carry them out with different behaviors. It is also worth noting that a piece by Baliga and Hunt (1988) essentially integrates organizational life cycle theory, transformational/transactional leadership and Stewart’s demands, constraints and choices into a combined management/leadership model that addresses both hierarchical and horizontal relationships.

The importance of all this for our discussion is that managerial W/B and leadership are integrated with both being heavily influenced by demands, constraints, and choices. Also, the kind of leadership exhibited is a function of a manager’s reaction to these dimensions—in some cases a heavy emphasis on a range of leader behaviors and in others, leadership hardly exhibited at all, even as there is considerable managerial behavior as a function of the DCC dimensions.

As an aside, Stewart’s above mentioned article, which she wrote to bring leadership and managerial W/B closer together, does not seem to have been particularly successful on that count. Nor were some similarly intentioned pieces

by me (Hunt, 1984a, 1984b, 1985) any more successful — leadership and managerial W/B are still not close together in terms of study. A careful development of why that might be is beyond the scope of this letter.

I think it's safe to say that Mintzberg's (1973) managerial behavior research is better known than that just described. For our purposes it is important to recognize that one of the ten roles identified in his observational study of CEOs was leadership. For Mintzberg, leadership meant motivating subordinates and integrating the needs of subordinates and the needs of the organization/work unit. It was seen not only as a role in itself but as contributing in differing ways to the remaining roles.

At about this same general time period, other managerial W/B research was started by Leonard Sayles (1964), an American who continued with related research for roughly 30 years (e.g., Sayles, 1993). He had an anthropological background and, like the Europeans, he emphasized non-survey data. His late-career 1993 book shows the evolution in his thinking and illustrates well his view concerning management and leadership.

Essentially, Sayles's 1993 book argues that managers tend to be trained in business schools, reinforced by on-the-job experience, in what he terms generally accepted management practices. These practices are taught in the kinds of management textbooks mentioned earlier (e.g., Bedeian, 1993). He divides his notion of management into non-leader managers who follow the above teachings and working-leader managers. The latter (Sayles, 1993, p. 13) are seen as having the capacity to make fast-paced tradeoffs (each involving embedded technology and people issues) emphasizing the ever-changing coordination and overall system needs. These needs hold regardless of whether a manager is dealing with quality, service, efficiency, or innovation. For Sayles, leadership that integrates disparate systems elements is the key, rather than leadership for inspiration or decision making.

3. Relationship of Leadership to Management

Zaleznik's (1977) study, cited earlier, joined especially by work such as that by Bennis and Nanus (1985), Kotter (1990), and others mentioned above, reinforced differences between leadership and management or managerial work and behavior. As writings have accumulated, it is obvious that not only do such differences exist but that there is not complete agreement on what the differences are. Also, of course, such is the gist of our exchange. Gardner and Schermerhorn (1992) provide a nice conceptual framework for these differences as shown in Table 1.

The table clearly shows the range of conceptions of representative scholars concerning leadership and management differences, from none (leadership=management) to complementary (separate but both needed), to entirely different (leadership≠management). For Gardner and Schermerhorn, Drucker exemplifies the first approach in contending that good leadership is "mundane, unromantic, and boring" and by considering good leaders to be managers who successfully accomplish: (1) the selection and development of quality personnel; (2) the setting of goals, priorities, and standards; and (3) the establishment of trust through consistent actions (Gardner and Schermerhorn, 1992, p. 101). These authors likewise interpret Henry Tosi (1985) as viewing effective management as the basis for effective

Table 1
Three basic perspectives of leadership and management

Perspective	Description	Representative authors
Leadership=management	Leadership involves selecting talented subordinates, providing them with goals and direction, and establishing followers' trust by backing up one's words with actions; the management functions of planning, organizing, and controlling represent critical components of the leader's job.	Drucker (1988)
Leadership and management are separate, but complementary processes	The primary function of leadership is to produce constructive or adaptive change; in contrast, the primary function of management is to ensure that an organization achieves its goals on time and on budget. Both processes are needed for an organization to prosper.	Kotter (1990) Bass (1985) R. Quinn (1988)
Leadership≠management	Leaders and managers have fundamentally different temperaments. Managers perceive work as an enabling process; management is an orderly and stabilizing process. Leaders risk disorder and instability as they seek out opportunities for change; leadership is a creative force.	Zaleznik (1977)

Note. Adapted from Gardner and Schermerhorn (2000, p. 100).

leadership. In Tosi's description, "with few exceptions, behind the popular charismatic image, the leader acts as a manager. A good deal of time is spent acquiring resources, making decisions, assigning responsibilities, and so forth" (Tosi, 1985, p. 225).

Of course both Drucker and Tosi tended to interpret leadership in charismatic terms. As you and our readers well know, not all leadership is charismatic. And, of course, the purpose for your letter takes issue with this no difference argument between leadership and management.

While some might consider the no difference position above as an extreme one, others would argue that the leadership does not equal management position is the really extreme one. Here, different kinds of people are conceived of as leaders from those considered managers. This was the original Zaleznik (1977) position.

The middle position, of course, is where the notions are separate but complementary and the position is a more balanced one. A good current illustration is provided by Robert Quinn and his associates (e.g., Quinn, 1988; Quinn, Faermann, Thompson, and McGrath, 2002). This approach uses an internal/external *X*-axis and a control/flexibility *Y*-axis as the basis for four quadrants, each with two roles, namely: open systems (innovator and broker roles), rational goal (producer and director roles), internal process (coordinator and monitor roles), and human relations (facilitator and mentor roles). The approach is comprehensive and calls for being able to exhibit both competing and complementary roles; for example, the innovator/broker roles are contradictory to the coordinator/monitor roles and the producer/director roles are contradictory to facilitator/mentor roles. In contrast, those roles within a given quadrant are complementary.

What Quinn and associates' framework suggests is that, what they term, "managerial leaders" must deal with all eight roles, some of which might be considered managerial and some leadership. Quinn and associates describe managerial leaders who can balance all these roles as "master managers." However, those who are not master managers should work on their weaknesses and/or emphasize roles they are good at while using management team members or subordinates to compensate for inadequacies in other roles, as needed. It is important to note that all of the managerial/leadership roles are necessary at one time or another. Also, each role is made up of three more-specific competencies or skills.

The Quinn approach is reminiscent of earlier work by Yukl and Nemeroff (1979) as well as related but less comprehensive work by those such as Page and Tornow (1987). To my mind, it allows, among other things, for the role definition which you have shown concern about—sometimes the person in the managerial role performs managerial activities and sometimes leadership activities.

4. Back to Basics

Some years ago, Barbara Karmel (1978) and John Campbell (1977) put forth the basic notion that a person's conception of leadership should depend upon his or her particular reason for studying leadership. For example, if we were interested in leadership development we would conceive of leadership differently than if we were trying to predict organizational effectiveness from leader behavior.

This back to basics point made especially good sense to me and I developed a simple model of it in my 1991 book. The model dealt with philosophy of science assumptions, along with leadership purposes, definitions, and stakeholders (Hunt, 1991, p. 44). I recently expanded this notion into the historical-contextual superstructure model with a series of antecedents: paradigmatic, purpose, definitional, level of analysis and temporality, and stakeholder (see Hunt, 2004). These antecedents, in turn, were connected with nine selected examples representing conceptions of "what is leadership" sets representing basic leadership approaches (e.g., leadership as cognition, leadership as shared influence). Of course nine is not magical, I simply selected nine broad approaches to leadership for illustrative purposes. A leadership scholar or practitioner would pick an approach of interest and evaluate it in terms of the various antecedents.

Because of space constraints and a more fully developed treatment elsewhere (see Hunt, 2004), I simply touch on the general ideas here. The paradigmatic antecedent considers a person's basic ontological and epistemological assumptions about the nature of reality and how that applies to leadership. Is leadership something real or is it little more than a term invoked to explain the inexplicable (scientific realist vs. interpretist assumptions; see Boal, Hunt and Jaros, 2003)?

The purpose antecedent requires thinking about why one is using a given leadership approach. The definitional antecedent is closely related to purpose and focuses on the definition of leadership for the purpose at hand. For

example, to what extent should it be separated from management? Does it involve leadership of the organization, per se (strategic leadership) or is leadership of those deep within the organization important? Is it a specialized role or does it involve shared influence? Of course, there are many other examples also.

The level of analysis and temporality antecedent calls for the leadership scholar or practitioner to recognize and evaluate specific level of analysis and temporal aspects in terms of a given approach. Gone, or at least rapidly leaving, are the days when these aspects were only implicit (Hunt, 2004).

The stakeholder antecedent calls for the leadership scholar or practitioner to keep in mind those for which the leadership project is most clearly intended (cf. Peterson and Smith, 1988). Thus, an intended scholarly journal audience is different from that of a group of practitioners.

For me, a perspective such as just described gets us away from a one-size fits all approach. Thus, we do not argue, for instance, about whether leadership is different from management, in the abstract, but rather is it important to make that distinction in whatever is the question of interest.

My bottom line at this point in our discussion can be summarized with two points. First, I believe that a series of antecedents using the historical-contextual superstructure framework, or something like it, is a useful way to deal with a wide range of researchable leadership questions. These questions can help us move beyond arbitrary subjective arguments that can be better served through systematic research and/or careful conceptual guidelines (cf. Yukl, 2002).

Second, for those questions where it is important to separate leadership from management or leaders from managers, I believe that leadership is a subset of the broader concept of management. The extent to which leadership is needed and its precise nature is a function of a person's organizational position; a manager typically is responsible for making sure that both appropriate managerial and leadership activities are completed as necessary. Of course, there are leaders who are not managers (but who may still be accountable for some managerial type activities) and there are managers who are not required to perform much in the way of leadership duties (cf. Bass, 1990; Yukl, 2002).

There you have it for now. I look forward to your response.

Regards,

Jerry Hunt

Institute for Leadership Research at Texas Tech

Texas Tech University

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Professor James G. (Jerry) Hunt
Paul Whitfield Horn Professor of Management
Senior Editor—*The Leadership Quarterly*
Director, Institute for Leadership Research
Rawls College of Business
Texas Tech University
Lubbock, Texas 79409-2101

Dear Jerry:

Thank you for your thoughtful response to my initial letter. Your comments on what does seem to be a longstanding enigma are quite helpful. As I understand your reasoning, you view leadership as an aspect (“subset”) of management, but hold that one’s conception of leadership should depend on one’s reason for studying leadership. This being said, my confusion in reading the leadership literature isn’t whether “leaders” and “managers” are different, or whether “leadership” should be subsumed as part of “management.” Rather, I continue to be baffled by the wide acceptance of studies that allege to be about “leaders” and their “followers,” but, in reality, are nothing more than studies of “managers” and their “subordinates.” As I adverted to in my last letter, I find it particularly puzzling how leadership scholars came to accept the notion that such studies actually deal with “leadership,” and to be so willing to incorporate their authors’ claims into the leadership literature. I still see such claims as being similar to false advertising and leadership scholars as being accessories in promulgating this masquerade.

Whatever leadership comprises, I still don’t understand how studying “managers,” with no regard for their demonstrated ability to exercise influence beyond that associated with their position power or authority, equates with the study of leadership. As an example in point, I’ve already expressed my qualms with findings derived from leader–member exchange (LMX) theory (Graen and Uhl-Bien, 1995). However titled, I still maintain that LMX theory really deals with relations between subordinates” and their “supervisors” and NOT “leaders” and their “followers,” and to suggest otherwise is to be gulled.

5. Common Ground

We do share common ground in your belief that leadership scholars and practitioners should be upfront about their definition of leadership; what I referred to in my last letter as being akin to a Federal Trade Commission warning about potential health hazards. You suggest, however, that for certain questions a distinction between “leadership” and “management” may be unimportant. I’m less sanguine in this regard. Indeed, I wonder if your logic may explain how the present confounding of “leadership” and “management” came about.

In re-reading your letter, and thinking about the origins of modern leadership research, it just seemed to me that the people I consider to be our academic forefathers – Cal Shartle, Ralph Stogdill, Ren Likert, for instance – would have recognized, and noted, the difference between “leaders” and “managers.” As a student of our field’s evolution, I am aware, however, that as events move away from their initial witnesses, subtleties in intent and understanding can be overlooked and, in time, eventually, either forgotten or, perhaps worse, distorted (Bedeian, 2004). This occurs much like the well-documented “serial-transmission effect,” which operates as information becomes less and less reliable as it passes from one managerial level to another in an organization. Indeed, several years ago, I documented how the dissemination of information through academic channels is subject to the same distortion as it passes from one generation of scholars to another (Bedeian, 1986). Your letter, thus, motivated me to search out the foundational statements associated with the original research that is yet the basis for much of today’s current thinking on leadership. To my surprise, I discovered what you and a colleague have previously labeled “academic amnesia” (Hunt and Dodge, 2001), and for which you’ve properly chastised contemporary leadership scholars.

6. OSU Leadership Studies

Taking the influential Ohio State University (OSU) leadership studies as an example, here's what I found during my search. In describing how leaders were "designated" for study, Richard Morris and Melvin Seeman (1950), two of the original OSU study researchers, explained: "To a large extent, the method used...by the staff has been the selection of individuals in high office as persons to examine for leadership (*without assuming that these individuals are, in fact, leaders*)" (emphasis added; p. 152). To their credit, Morris and Seeman go on to caution that the uncritical acceptance of the "stereotype" of someone in a high office as a leader "can severely restrict the applicability of leadership data to more general problems of social structure and social control" (p. 152). In effect, they provided a clear "FTC warning" to their readers saying that, although they were interested in studying leadership, by accepting managers as surrogates for leaders, they were "severely" limiting the generalizability of their results.

The OSU researchers' decision to follow the "officeholder as leader" stereotype, rather than to study individuals who, in Morris and Seeman's words, had "demonstrably made a difference in the group, i.e., ...exercised influence" (p.152) was, thus, based on an admitted assumption. As expressed by Stogdill and Shartle (1948), Morris and Seeman's OSU colleagues, "It is assumed that leadership in some form exists in top administrative positions, as well as at other levels in the organization [and, thus,] it is proper and feasible to make a study of leadership in places where leadership would appear to exist and that if a person occupies a leadership position he is a fit subject for study" (p. 287). Whereas Stogdill and Shartle then proceeded to proclaim that, "The question as to whether *leaders* or *executives* are being studied appears to be a problem at the verbal level only," they do acknowledge that "the soundness of these assumptions" must be tested (p. 287).

To the extent succeeding generations of leadership scholars have continued in the footsteps of the field's progenitors, somewhere along the "serial-transmission line," they seem to have failed to appreciate (and, as far as I can tell, rarely "tested") the assumptions on which they were building and, with the fog of time, the "academic amnesia" you've lamented seems to have taken hold as "managers" came to be defined as "leaders," and any doubt about the possible limitations this "stereotype" might place on the generalizability of their work long forgotten. This is not to say that there were no protests as this "academic amnesia" was occurring. As early as 1959, Fiedler (1961) echoed Morris and Seeman (1950) in warning, "The term *leader* is not precisely defined and has more than one meaning. We use the term to identify a person who occupies a leadership position, although he may actually have little real influence over his group members. . .*We must assure that the formal leaders are leaders in fact*" (emphasis added, p. 181). And, still again, almost a decade later, Hollander and Julian (1970) found it necessary to repeat Morris and Seeman's caveat:

An especially major limitation is the continuing emphasis on leaders as managers, without reference to the wider ramifications of the leadership enterprise. Side by side with this narrow emphasis is the still prevailing view of leaders as occupiers of a fixed position, rather than, in more dynamic terms, as attainers or maintainers of their standing with followers. Together, these emphases have tended to slight the influence process which is basic to leadership phenomena (p. 34).

It is the slighting of the influence process to which Hollander and Julian refer that forms the basis for the confusion that prompted by initial letter. Further, it amazes me that leadership scholars continue in their research without regard to whether the individuals they are studying are, in fact, leaders. To truly study leadership, and overcome the limitation that Holland and Julian decry, requires the identification of individuals who have differentiated themselves from those around them in terms of their influence (beyond that associated with their formal position power or authority), not simply the study of individuals whose names appear in a box with a title on an organization chart.

7. The Past Lives in the Present

In thinking about the current state of affairs, in which "managers" are simply deemed "leaders" by the stroke of a researcher's pen, I've further wondered why "leadership" first emerged as such a "hot" topic in the late 1940s and early 1950s. From what I can discern, it seems that a major reason behind a heightened interest in leadership was the U.S. military's experience in World War II (Petrullo, 1961). Whereas the OSU studies began in 1943, leadership research received a big boost with the publication of Stouffer, Suchman, Devinney, Star, and Williams's (1949) classic study *The American Solider: Adjustment during Army Life*. With the realization that much of what the military

thought it knew about leadership, it didn't, the Office of Naval Research established an advisory panel on psychology and, shortly after the war's end, began awarding contracts to scholars at OSU and other universities to study leadership. The research that came from this early funding is reported in Gutekzow (1951) and Petrullo and Bass (1961). As in so many other endeavors, money does seem to have driven events.

It also seems that this is another example of how present management applications are what the past – as received and interpreted by the present – have made them (Bedeian, 1998). Much like the Biblical injunction declaring the sins of the father would be visited upon the child (*Exodus* 34:7), it seems the assumptions of leadership theory's forefathers have been visited upon contemporary scholars. Whereas early leadership scholars clearly stated their research assumptions, their descendants seem to have forgotten the basis of the early work on which they have built and to be oblivious to the resulting implications for their presumed knowledge. For someone who has spent years reading the leadership literature, I find it discouraging, despite the enormous attention given to leadership, not to mention the estimated \$15 billion a year spent on leadership classes (Hunter, 2004), that the lack of an adequate answer to the question "Who is a leader?" continues to be a barrier to studying leadership. It seems to me it is high time for scholars to cast aside years of faux leadership studies and, perforce, distill what is truly known about leaders and leadership. I can see no alternative if our understanding of either is to advance.

I realize that my challenging of the assumed shared identity of managers and leaders has the frightening prospect of bringing virtually all of leadership research into doubt and, moreover, may elicit considerable defensiveness. An unwillingness of leadership scholars, however, to heed Stogdill and Shartle's (1948) admonition to test this assumption risks continuing to take leadership research down a dead-end street or, perhaps more accurately, a circular drive. If managers and leaders are not identical and, if most leadership research continues to use "managers" and their "subordinates" as subjects, then what is revealed about managers may have nothing to say about "leaders" and their "followers." Taken to the extreme, this one flaw could move leadership research back to square one. It seems to me that leadership scholars must answer two of the most basic questions encountered by any field: "Is the object of study the correct object of study? If not, how valid can the resulting inferences be for understanding the phenomena of interest?" In that you possess a perspective that could only come to someone who has spent his entire academic career studying leadership, I would value your thoughts on how leadership scholars might jettison, or at least test, what seem to be vestigial assumptions inherited from earlier times. In closing, let me again thank you for helping me sort through my confusion. I have benefited greatly from your many insights.

Sincerely,

Arthur G. Bedeian

Boyd Professor

Louisiana State University

Author's Note: The stimulating comments of W. Jack Duncan on an intermediate draft are gratefully acknowledged.

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Letter 4

Professor Arthur G. Bedeian
 Department of Management
 Louisiana State University
 Baton Rouge, LA 70803-6312

Dear Art:

Your two letters together have set me to thinking more about this whole leadership and management question. And the thinking has involved areas that I took for granted had been dealt with adequately. Now, I am not so sure, in fact you have convinced me they have not been dealt with adequately at all.

At the same time, in my Letter 2, I note that I summarized lots of historical material on leadership/management similarities and differences but I really did not adequately address your absolutely key truth-in-advertising argument that, from your read, much (indeed, far too much) of the leadership literature treats managers and leaders interchangeably and, even worse, does not let the reader know explicitly that this has occurred. Furthermore, you elaborated on this notion in your second letter (Letter 3) where you raised the question that if the object of study was not the correct one how valid can inferences from that object be? And the final telling question was how might leadership scholars jettison, or at least test, what seem to be vestigial assumptions inherited from earlier times—academic amnesia reincarnated, as it were.

In emphasizing my historical approach I was “hoisted on my own petard”, as they say. You, as the historian that you are, of course, went back to the classical Ohio State works and got as close as you could to the original documents. You also reminded me of the “academic amnesia” issue that a colleague and I had used in another context (see Hunt and Dodge 2000). At the same time, Jack Duncan was kind enough to critique your letter. He, no doubt, had some historical insights to add to yours and voila, I was hoisted on my petard and nearly flipped on my head.

So let's see where the results of the petard hoist leave us, at least in my mind. Let me see if I can address your issues and still be true to myself as I tried to be in my response letter (Letter 2) to you.

8. Leadership/Management Definitions One More Time

In terms of your original statement, both in your Letter 1 and Letter 3, concerning lack of truth-in-advertising I decided to do an informal investigation, beyond that in my earlier letter. I used the literature I had at hand plus some literature recently acquired. The former literature, by the way, included originals of your Ohio State works (which I had not used).

Early on, I checked a number of leadership textbooks, including my old standby Yukl (2002), as well as the Bass (1990) *Bass and Stogdill Handbook of Leadership*. Perhaps not surprisingly, the textbooks invariably at least mentioned the difference between management and leadership as good textbooks are wont to do. Depending on

the nature of the text, the difference was based on the current scholarly literature while in other cases the difference was at least partially idiosyncratic. The cited scholarly literature typically emphasized the kind of difference I treated when initially mentioning those such as Kotter, Gardner and Schermerhorn and others. That difference tended to stress change on the part of leaders and stability on the part of managers, both of these reflected in various ways. Yukl (2002) influenced my argument in Letter 2 by covering possible differences, weaving them into his treatment, and concluding with the point that it was not very fruitful currently to spend much time on definitions but rather one should examine the issue empirically or move on. The empirical point, of course, is alluded to in your final question about jettisoning or at least testing vestigial assumptions from earlier times.

Interestingly, there have been at least three other definitions proffered fairly recently. The first of these is by Locke, Kirkpatrick, Wheeler, Schneider, Niles, Goldstein, Welsh, and Chah, (1991) and the second is by Stephen Covey (2004), *The 8th Habit* that is rather different than those habits mentioned earlier. Both definitions have the virtue of being simple (although perhaps they are not as simple as they first appear). Locke and his associates argue that management is the implementation of the leader vision. In other words, the manager and subordinates act in ways that constitute achievement of the stated vision. Covey contends that one leads people and manages/controls things. Some examples are: money, costs, information, structures, processes, tools, and facilities, all of which are without the ability to choose. He also makes the insightful observation that “sometimes ‘people’ choose to be managed under their own leadership” (e.g., many professionals and other producers; p. 101).

A third definition is more complex and is really developed across a book by Elliott Jaques (1989) and a follow-on book by Elliott Jaques and Stephen D. Clement (1991). Both of these books systematically examine leadership at multiple organizational levels and the former strongly influenced my *New Synthesis* book (1991).

Jaques and Clement’s (1991) leadership definition is as follows:

Leadership is that process in which one person sets the purpose or direction for one or more other persons, and gets them to move along together with him or her and with each other in that direction with competence and full commitment (p. 4). “The second point is that leadership is not a free-standing activity: it is one function, among many, that occurs in some, but not all, roles (p 5).”

It is interesting to note that this definition is quite similar to the general notions involved in some more current leadership conceptions. However, it tends to focus on the traditional one-person leader more than many of the others.

Again, for Jaques and Clement, all managers carry leadership accountability and good management includes good leadership as an integral part of all its functions without which managership per se cannot exist. Along with planning, communicating, setting operational targets, etc., leadership is an everyday part of the successful discharging of the managerial task to get willing and enthusiastic collaboration of followers.

It also is important to note that the *New Synthesis* book emphasizes very strongly Dubin’s (1979) leadership *of* organizations versus leadership *in* organizations argument. The former essentially approximates what many people consider strategic leadership while the latter is lower-level face-to-face leadership. Leadership *of* considers various aspects of strategy and organizational design, along with indirect impact on those deep within the organization. Leadership *in* tends to incorporate direct leadership — primarily, if not entirely, face to face leadership. Of course, strategic leaders also invoke leadership *in* with their work teams, as an example. Also, at the same time, neither of these notions necessarily separates leadership from management although leadership *of* probably more closely approximates management. However, one could make the case, as you have done, that we still have not sufficiently separated leadership from management.

So much for three of the more recent definitions. To these and the ones in my Letter 2 it is important to pay attention to three other related considerations. First, is a focus on management and transactional leadership – a crucial point here that is not always emphasized is that while, in many cases, leadership is contrasted with management by being more change oriented – not all leadership is the same. Indeed, transactional leadership is remarkably similar to many definitions of management in that change is not its major objective.

A typical definition of transactional leadership emphasizes the implicit social exchange or transaction over time that exists between the leader and followers (Hollander and Offermann, 1990, p. 181). Whereas, in transformational leadership, followers are seen as going beyond expectations, in transactional leadership they go only as far as the exchange relationship suggests (see Bass, 1985).

Second, and reiterating an important aspect of your telling questions in both Letter 1 and Letter 3, you especially emphasized Graen's (cf. Graen and Scandura, 1987) Leader–Member Exchange or LMX approach as a managerial approach masquerading under a leadership label. On its face, I certainly would agree. I found a very strong (almost but not quite exclusive) tendency to use the terms leader, manager, supervisor and even boss synonymously. Further, the entities serving as the basis for discussion tended to be focused on organizational supervisor–subordinate work units. Interspersed throughout this supervisor–subordinate discussion was the term “leader” and “leader–member relations” (LMX). Thus, across much of this literature there was no differentiation between leader and any of the other terms just mentioned. Indeed, this work might qualify as one example of the no leader–manager difference category in the antecedents model and Drucker/Tosi examples in my Letter 2 and about which you saw yourself as less “sanguine” than me.

Upon closer reading, especially of the Graen and Uhl-Bien (1995) work, I concluded that, in spite of the above terminology, the LMX approach, while heavily managerial, did appear to provide some managerial/leadership differences across time. Essentially, some subordinates continued in an exchange relationship much like that involved in transactional leadership, briefly discussed above. Other subordinates developed relationships across time that, in some cases, for Graen and company were seen as becoming very transformational like.

Indeed, in discussing LMX, Hollander and Offermann (1990) argue that implicit leadership theories (ILT's) will differ between peoples' responses to the cue “leader” and “supervisor” (with the latter being seen as much less favorable; see Offermann, Kennedy, and Wirtz, 1987). Similar findings also were reported by Meindl (1990). Although Hollander and Offermann did not discuss what might account for whether a supervisor is seen as a leader or not, it seems reasonable to assume that those individuals who developed more transformational-like relationships would tend to describe their manager or supervisor in more leader-like terms.

Finally, an increasingly important and very different way of considering leadership and management is in the context of group and team aspects. Here the authority and power relationships may well differ substantially from those in the kinds of groups we have just been discussing. This is especially the case with, say, student groups or teams where the instructor leaves it to the students to determine their leaders. Basically, groups/teams of this type are one kind of self-managed or self-leading team but without the sophistication of such a team in what students might consider the real world. Essentially, the team has members with no formal authority. Thus, team influence necessary in getting assignments completed is all informal as opposed to the formal managerial authority of the previous examples.

Even in the real world teams, the kind of self managing, self leading makes a difference — sometimes there is an external supervisor assigned to the team who serves as a liaison with outside individuals or units and frequently team members themselves serve in leadership/managerial roles. Also, sometimes these members are systematically rotated and the members assume what role or behavior is needed to accomplish a specific task (Schermerhorn, Hunt, and Osborn, 2005). In both cases, the leadership/management authority relationships either are non-hierarchical or hierarchical relations of a different kind (from, say, the outside supervisor mentioned previously). However, as before, neither management nor leadership is the same but the ways in which they differ depend on the selected definitions of each.

9. Truth-in-Advertising Revisited

Given your arguments, and much of my previous discussion, including that above, it is fair to argue that there are differences in behaviors required of those in leadership and managerial roles. At the same time, these differences are often assumed away by leadership scholars and practitioners. For me, such differences exist, nevertheless, and must be carried out by someone, whether the person's position is that of a leader or a manager. And to reiterate my earlier stance, for those with leadership strengths, managerial duties may be assumed by one or more other team members and vice versa for those with managerial strengths. Even so, for the latter, there may well be a bias against delegating the “exciting, change-oriented” leadership duties versus assuming responsibility for “making the trains run on time” or ordering the paper clips. The key, however, is first to know thyself. Then think in terms of both sets of requirements and clearly identify that they have been carried out, along with some identification of those so doing.

How might we reconcile the above with truth in advertising and even further with Yukl's contention that empirical examination will be more fruitful than arguments back and forth? While I personally cannot recall seeing empirical

work along these lines a couple starting points come to mind, once a specific definitional difference between management and leadership is agreed upon by those involved.

As illustrated in our definitional discussions, the difference does not have to be a universal one, but simply a clearly described and agreed upon one that is reasonably consistent with others in the literature. Then one might simply ask the leader and followers for a rough estimate of the proportion of time spent on management vs. leadership during whatever period of time is under consideration. One could then refine this notion or not but would be sensitized to the empirical differences but with less likelihood of getting into fruitless arguments. Ultimately, among other things, one could use such information as a moderator.

A second interesting but very different approach is suggested by the one previously mentioned by Hollander and Offermann (1990) for those following implicit leadership (ILT's) and related conceptualizations. Recall that here people were asked to indicate and evaluate those whom they saw functioning as a leader or supervisor. To do this, of course, the describers needed to have in mind an implicit theory that could be activated depending on whether one was describing a leader or supervisor.

I'm sure there are numerous other alternatives but an alternative such as those suggested would, as previously mentioned, help condition one's thinking to leadership/management similarities and differences. Once again, the above idea argues for the importance of both roles, the possibility of one or more than one person bearing responsibility, and for some kind of systematic but simple measurement for comparison purposes across comparable studies.

Approaches such as these, but tailored to specifics, could then be routinely emphasized in future leadership/management research. Ultimately, then, these could form a part of a research base and deal with truth in advertising as well as related issues. Note also, that this suggestion does not call for a universal buy-in concerning an agreed upon conceptualization of leadership. As I have shown, these conceptualizations are very numerous and the chances of such a buy-in are slim and none based on examples such as Pfeffer's (1993) piece and that of his respondents (e.g., Cannella and Paetzold, 1994). There he proposed obtaining agreement concerning definition and conceptualization of the organization theory field and the respondents replied by, in effect, asking, "who made you king"?

As I replied in my Letter 2, "there you have it for now". Now I repeat once again, "there you have it" but, this time, what I said above is really all I have to say. I have enjoyed the exchange, hope I have finally dealt with your concerns and that you have learned as much as I have from these letters. Paraphrasing a scholar well known to both of us, Karl Weick, "How can I know what I mean until I see what I say?"

Regards,

Jerry Hunt

Institute for Leadership Research at Texas Tech University

Author's Note: I thank Adam Bailey and Chris Broberg for helpful comments on this and my earlier letter.

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