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Learning how to be a transformational leader through a skill-building, role-play exercise

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ABSTRACT

Transformational leadership is a universal ideal leadership style. Research has shown that transformational leadership is more effective across a wide range of situations compared to transactional leadership. However, in practice, managers often resort to a transactional style of leadership. Thus, it is important to provide students an opportunity to practice the transformational leadership style. This article details a two-step, role-play exercise that enables students to learn and apply specific influence tactics that can be used by transformational leaders. The exercise is ideal for use by instructors of both undergraduate and graduate organizational behavior and leadership classes. This exercise can also be used for executive training and coaching.

1. Introduction

Transformational leaders influence their followers by instilling in them a sense of purpose, providing them a vision, and then motivating them to achieve their goals (Bass, 1990; Hoffman, Bynum, Piccolo, & Sutton, 2011). Researchers have identified the following four distinct dimensions of transformational leadership (commonly referred to as 4Is): idealized influence, inspirational appeal, intellectual stimulation and individualized consideration (Judge & Piccolo, 2004). The definitions and examples of these behaviors are provided in Appendix A. Transformational leadership is often contrasted with transactional leadership, where leaders provide followers something they want in exchange for what the leader wants (Judge & Piccolo, 2004). Research has shown that across the globe, peoples' descriptions of an ideal leader closely resemble the characteristics of a transformational leader (Bass, 1997). In addition, transformational leadership has been shown to be effective across a wide range of situations compared to other transactional leadership styles. (Judge & Piccolo, 2004). However, transactional leadership style is more common in organizations (Liu, Liu, & Zeng, 2011). This creates a gap between what people idealize and what they actually encounter and enact in organizations. One way to bridge this gap is by training future managers how to be transformational leaders.

Transformational leadership is a skill that can be imparted. Management scholars have emphasized the role of imagery and metaphors in developing deeper understanding of transformational leadership in students (Boozer & Maddox, 1992). The pedagogical techniques of focused discussions (Sprinkle & Urick, 2016) and integrative diagrams have shown to be effective in teaching leadership theories in an actionable manner (Jackson, 1993). Building on previous work, my goal is to share a role-play exercise that provides a simple yet challenging practical scenario within which students can practice transformational leadership tactics.

Behaviorally oriented concepts, such as leadership, require pedagogical techniques (e.g., experiential learning, simulations, role-plays) that can ensure emotional arousal in a psychologically safe environment (Bowen, 1987; Tompson & Dass, 2000). Role-plays are an effective experiential tool to develop managerial skills that students retain for a long time (Little, 1990). Management educators have included role-plays for teaching various topics, such as strategy (Quarstein & McAfee, 1993), business ethics (Comer & Vega,

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2006), collaborative decision-making and conflict (Egri, 1999), teamwork (Seltzer, 2016), negotiations (Massengill, 1979), and path-goal leadership theories (Seltzer & Smither, 1995). However, there is no easily accessible role-play for practicing transformational leadership. Therefore, I have developed a role-play exercise for students to practice the transformational leadership style in a workplace scenario. I have used this skill-building exercise successfully for several years. This role-play can be used by instructors of both undergraduate and graduate organizational behavior, leadership, and managerial negotiation classes. This exercise can also be used for executive training and coaching.

2. Learning objectives

It is essential to state at the onset that transformational leadership style governs many ongoing short-term and long-term activities including daily interpersonal interactions, role-modeling, goal-setting, visioning, supervision and relationship management. Developing skills to be a transformational leader not only requires knowing how to respond to a specific situation, but also needs an ability to create a suitable personal and organizational context. For example, a leader may be eloquent (knows what to say in a meeting), but may lack integrity (personal context). This role-play mainly emphasizes situation-specific actions, with less emphasis on the broader contextual elements. For example, this role-play does not focus on teaching students how to be a role-model or how to define an organizational vision. The role-play assumes that the subject is a role-model with a vision. However, students are directed to make references to the presumed contextual aspects to successfully enact the role-play. For example, a student can refer to his or her credibility as a leader.

Specifically, the learning objectives for this exercise are to:

1. Learn the definition of the four behaviors associated with transformational leadership.
2. Formulate and practice, through peer discussions, specific transformational leadership tactics that can be used with the four transformational leadership behaviors.
3. Develop skills in modeling transformational behaviors through a role-play exercise.

3. Role-play overview

I use this role-play at the end of the leadership module (see Table 1), so that students have the conceptual knowledge of various soft and hard influence tactics and various theories of leadership (e.g., behavioral leadership, situational leadership theories, and transformational and transactional leadership styles). A classroom is divided in two to four large groups and each group is handed one of the two roles (chief executive officer and finance manager). The role-play concerns a scenario where a well-respected and competent finance manager is offered a promotion to the head of internal audit (Appendix B provides student handouts). The head of internal audit is a key strategic position for the long-term success of the organization. An internal audit department is responsible for providing an objective and unbiased view of a wide-range of organizational initiatives and systems, including financial and accounting practices, governance mechanisms, risk management processes, ethical practices, and organizational culture. The head of internal audit assesses whether an organization's systems and practices are effective in realizing its long-term strategic goals. In case of discrepancies, the internal audit head is expected to recommend changes and facilitate improvements. In order to objectively fulfill its role, the head of the internal audit remains independent from company operations, and reports directly to the chief executive officer and the board of directors. To be effective in this strategic role, the head of the internal audit must be a qualified person who has the credibility to challenge the status-quo, champion new ways of doing things, and influence others to bring about the necessary changes for the long-term success of the organization.

The manager in the role-play is an ideal candidate for the position, but is hesitant to accept the promotion. Thus, the challenge for the CEO in this role-play is to inspire the manager to accept the strategic leadership role. The CEO is expected to motivate the manager by explaining how this new role provides an opportunity to contribute to the organization's mission. The CEO is expected to paint a big picture by highlighting how the new role is essential for protecting the organization's interests, promoting effective values and culture, and contributing to many positive organizational outcomes such as long-term sustainability, community relationships, corporate social responsibility and employee well-being.

The role-play provides an opportunity to use transformational leadership tactics. Researchers have argued that convincing followers' of the congruence between their values and organizational goals is at the core of transformational leadership (Hoffman et al., 2011). The perceptions of value congruence causes followers to regard organizational goals as their own and exert extraordinary effort in goal accomplishment (Bono & Judge, 2003). In the role-play exercise, the manager values fostering effective relationships

Table 1
Learning activity description.

Time required: 75 min

- View “You are dismissed video”—3:25 min (Optional)
 - https://www.youtube.com/watch?v=_SbkHgx6YIo
 - Provide examples of each of the four transformational leader behaviors—10 min
 - Explain the structure of the exercise and divide students in four groups—10 min
 - Group discussion of possible behaviors for the role-play—15 min
 - Role-play—20 min
 - Debriefing—15 min
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