



The identification of temporary horizontal leaders in projects: The case of China

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Abstract

Balanced leadership in projects describes the dynamic transition of leadership authority between the project manager and one or more team members. Within this concept, the present study investigates the context, criteria, and processes for identifying project team members as candidates for the role of horizontal leader. Five case studies, followed by validation interviews were conducted in China. Results show that structure and agency by the project manager set the context, wherein professionalism, personality and attitudinal characteristics of team members are evaluated for identification. This is executed in two parallel processes, where the project manager evaluates, develops and assesses candidates, and the team members evaluate their situation, compete with others, develop their skills, and look for guidance from the project manager. Managerial and theoretical implications are discussed.

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1. Executive summary

Research shows that leadership in projects is subject to dynamics which are not accounted for in traditional leadership theories. Examples of these dynamics include the constant in-flow and out-flow of specialists and teams when needed at the different stages of projects (such as design or quality assurance teams), or specialists when particular issues need to be solved. Project teams are therefore under a steady reformation, which gives little chance for these teams to develop and mature in the sense of traditional leadership theories. This has implications for leadership in projects.

Prior research showed that leadership in projects is neither solely executed by the project manager, nor solely executed by the team or some of its members. Instead, leadership is exercised by the resource most appropriate at any point in time

to lead the project. While leadership rests formally with the project manager, it is frequently handed over to specialists or other resources to lead temporarily, for example, to solve a technical issue, and then handed back to the project manager. This dynamic is termed Balanced Leadership in a contemporary stream of literature.

In this paper, we address the question how project managers identify those team members who can act as temporary leaders in particular circumstances in a project. Focus is hereby on projects in China, to rule out effects stemming from differences in national cultures. We conducted five case studies using 28 interviews, and a further five interviews in other companies to validate and deepen the understanding of the findings.

The first part of the study investigated the context variables that enable the identification, and the criteria used by project

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managers for identification of possible temporary leaders in the team. Two contextual enablers for balanced leadership were identified. These were structure (including company policies and culture, size of the project, and need for a specialist leader role) and agency, in terms of the project manager's role understanding and willingness to allow balanced leadership to happen. Criteria used for identification of possible leaders are a) professionalism in doing their tasks, b) personality, including their emotional and social skills and "fit" to a leadership situation, and c) the attitude of team members towards their work, such as the intention to be promoted to lead, as well as their general attitude towards their role.

The second part of the study addressed the process for identification. Two processes were found to work in parallel, one executed by the project manager through preliminary evaluation of candidates and their further development to qualify for a temporary leader role. The other process is executed by the team members and consists of evaluation of the situation, their development of an identity to make them appear as a good "fit" for leadership in a particular situation, followed by the development tasks offered to them by the project manager in order to qualify them as a temporary leader. During these parallel processes, the project manager always evaluates the candidates along the criteria of professionalism, personality and attitude in order to develop a basis for future decisions on the empowerment of possible leaders from within the team.

The study contributes to the understanding how leaders in these dynamic environments are identified. An appointment to a temporary leadership role often triggers a subsequent appointment to a first formal project manager role. Thus, the study shows the context, criteria and process that team members should take into account when aiming for making themselves visible as potential future project managers, or as outstanding professional in their fields.

A further contribution of the study lies in the development of a theory for identification of leaders in balanced leadership, which contributes to the currently emerging stream of literature on the dynamics of leadership in frequently changing temporary teams in projects.

2. Introduction

The concept of balanced leadership has recently entered the realm of project management research. It describes the dynamics in the transition of leadership between a project manager as vertical leader and a team member as temporary horizontal leader. The concept bridges the two so far distinct perspectives of person-centered (vertical) leadership by the project manager (e.g. Turner and Müller, 2006) and team-centered (horizontal) leadership by one or more members of the project team (e.g. Crevani et al., 2010). Balanced leadership developed from the observation that projects employ both forms of leadership and that attempts to understand project leadership from one perspective only substantially compromises the chances of understanding project reality.

Both leadership types are defined as social processes which drive the project forward, whereby the vertical leader influences

the team and project stakeholders, and the horizontal leader influences the project manager, the rest of the team and the stakeholders (Müller et al., 2017b). Through leadership, leaders center on the satisfaction of the social and esteem needs of the individual team members as well as on creating a positive relational climate within the team (Ceri-Booms et al., 2017). As such leadership is distinct from management, with the latter being about responsibility to conduct and accomplish objectives (Bennis and Nanus, 1985). Furthermore, leadership of project teams in temporary organizations is characterized by short-term influences, which is different from that in permanent organization, as project team members are drawn from different functional units and temporarily work together towards a novel objective and a planned project start and end date (Savelsbergh et al., 2015; Turner, 2009).

While vertical leadership is granted to the role of the project manager through an organization's structure, horizontal leadership requires enabling. Hence, horizontal leadership is granted to a team member by the vertical leader (Cox et al., 2003). To that end, the present study builds on and extends earlier work on leadership in project management by Rodney Turner and his colleagues (such as Turner and Müller, 2006).

Empirical research on balanced leadership in projects has thus far developed a theoretical framework that describes how balanced leadership develops through the interaction of vertical leaders (i.e. project managers) and team members (i.e. potential horizontal leaders). It consists of a cycle of five events. An event is hereby defined in the sense of Whitehead (2010, p73) as "a nexus of actual occasions, interrelated in some determinate fashions" in the actual world. These events are a) nomination of project team members, b) identification of possible candidates for horizontal leadership, c) empowerment of the candidates, d) horizontal leadership by the team member and its governance, and e) transitioning back to vertical leader (Müller et al., 2017a).

Most of these events are currently under investigation by different research teams around the globe. The present study is part of this worldwide network and investigates the event for *identification of candidates* for horizontal leadership. This is the time after the nomination of team members, which constitutes the pool of potential horizontal leaders, and before the project manager selects and empowers a candidate through granting horizontal leadership authority. The research question we address is:

RQ: *How are potential candidates for horizontal leadership in projects identified?*

The Unit of Analysis is the interaction between project manager as vertical leader and project team members as potential candidates for horizontal leadership. The study takes the ontological stance of Critical Realism, thereby aiming for explaining the phenomenon, but not claiming that this explanation is the only possible one (Bhaskar, 2016). The above mentioned balanced leadership theory framework, is based on Realist Social Theory and its morphogenetic cycle (Archer, 1995, 2004). In line with that we take a sociological perspective as theoretical lens. Five case studies with 28 interviews were held to understand and theorize the phenomenon, followed by five deepening and validation interviews. A total of 33 interviews

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