

Transforming or Transacting? The Role of Leaders in Organisational Transition

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Abstract

Within accounts of and frameworks for organisational leadership, especially in the public sector, there is continuing enthusiasm for the distinction between transformational and transactional models, where the latter is typically compared unfavourably with the former. This paper reports on a review of the literature on organisation transition (that is mergers and acquisitions), which found this distinction helpful in ordering the material considered. Unexpectedly, the review found that more of the advice contained within the papers examined focused on interventions that could be broadly categorised as transactional rather than transformational. This seems an important finding in a context where the distinction continues to have salience and when transformational characteristics are often seen as being essential to leadership and transactional attributes are perceived as merely being suggestive of management.

Key words

transforming; transacting; organisational transition

Introduction

Over the past ten years, the literature on the requisite characteristics of leaders has seen increasing emphasis on the importance of transformational attributes. As one of its most active promoters argued almost a decade ago: *'leadership has experienced a major reinterpretation from representing an authority relationship (now referred to as management or transactional leadership which may or may not involve some form of pushing or coercion) to a process of influencing followers or staff for whom one is responsible, by inspiring them, or pulling them towards the vision of some future state...this new model of leadership is referred to as transformational leadership because such individuals transform*

followers' (Alimo-Metcalfe, 1998, p7). This contrast between transformational and transactional approaches to leadership has, for many writers, served to highlight the distinction between leadership and management. In these accounts, leaders are transformational and managers are transactional (eg. Zaleznik, 1992; Dubrin, 2004); the former do the right thing, whilst the latter merely do the thing right (eg. Bennis, 1994). Of course, not all commentators either share this enthusiasm for the scope of transformation or distinguish leadership from management on this basis (eg. Collins, 2001; Bass & Avolio, 2002; Fullan, 2001).

Furthermore, transformational leadership has not been entirely able to shake off its antecedents in charismatic leadership (Bryman, 1992). Perhaps

best seen as one, and only one, characteristic of transformational leaders – a necessary but not a sufficient condition – the charisma of chief executives was a cause for celebration in the 1980s (eg. Peters & Waterman, 1982) and a cause for concern twenty years later (Mangham, 2004). Nonetheless there are sober accounts (eg. Bass, 1990) of the approaches that transformational leaders adopt towards their followers: individualised consideration; intellectual stimulation; inspirational motivation; and idealised influence (that is, providing a role model). Taken together, transformational models stress the central importance of the interpersonal exchanges between a leader and an individual follower, almost regardless of organisational context. These accounts undoubtedly contain some wisdom, but the whiff of charisma that still hangs around the concept of transformation has thus become tainted by the corporate scandals that Mangham (2004) discusses. In contrast, transactional approaches lay much more stress on the centrality of the leader's disciplined approach to the routine procedures of organisational life, where context may well be central to the way in which these are adopted or adapted.

However, the alleged predominance of transformational attributes in leaders – and the dichotomy between transformational leadership and transactional management that follows in its wake – have become commonplace in the conceptualisation of leadership in the public sector. In the NHS, for example, the national leadership qualities framework (Department of Health, 2001) is underpinned by the transformational model (see Davidson & Peck, 2005) and consists of three dimensions and 15 scales. Evidence of the connection between this framework and ideas derived from the academic school of transformation is provided by its close fit

with the transformational leadership questionnaire (TLQ). This feedback instrument for putative leaders, aimed at enabling them to learn from their followers, also contains three dimensions (this time with 14 scales) and was developed following an investigation into leadership styles across the public and private sectors in the UK (Alimo-Metcalf, 1998). However, the TLQ is not based on an analysis of what leaders do; rather, its roots lie in a survey – albeit a very extensive survey – of what employees would like to see in their perfect leader (and also, perhaps, in themselves). Such flaws may be behind transformation losing some of its currency in the private sector (and also being challenged by studies in the public sector, see Currie *et al*, 2005). Nonetheless, senior figures from the English NHS National Institute for Innovation and Improvement (NIII) continue to promote the virtues of transformational approaches, for example to service redesign (see Bevan, 2005).

In 2005, the authors were commissioned by the NIII to undertake a review of the descriptive literature on leadership and management during organisational transitions (that is, mergers and acquisitions). Upon examination, it seemed possible to characterise this literature as being concerned with interventions that could be seen as either transformational or transactional (see Dickinson *et al*, 2006a; Dickinson *et al*, 2006b). This analysis seemed to offer the opportunity for a fine grain discussion of both the differences between these two concepts and the apparent balance between them at a time of major organisational change. This paper takes up that opportunity.

Methodology

The research project was commissioned to distil knowledge that would be of practical use to the managers and clinicians charged with leading

organisational transition within the NHS; predominantly for those who will be leading the forthcoming round of reorganisation within the health services. The output was to highlight the best practice principles to be employed when implementing an organisational transition and managing post-merger integration.

Drawing on the research team's prior knowledge of the literature, a synthesis session was held to establish what were considered to be the key themes during organisational transition. Furthermore, given the knowledge of the literature from this area a methodology of realist review was selected. Realist review is a fairly new strategy for synthesising data, with an explanatory rather than judgemental focus (Pawson, 2002). Realist review does not prefer one method (ie. quantitative/qualitative) over another, and sees strength in marrying these approaches so that process and outcomes may both be investigated. Using a mixed picture of a number of different studies can prove to be particularly illuminating. However, this does not mean taking on board all evidence uncritically. Good practice in synthesis involves weighing up the relative contribution of each source, which might involve dismissing some sources. In this respect, to synthesise means to make sense of the different contributions. Items were considered for inclusion, not by whether it met a series of pre-qualification checks, but by the worth of the study to the synthesis.

Following the standard methodology of realist synthesis, interviews were held with stakeholders in order to tap into official conjecture and expert framing of the issues being addressed. The themes from the synthesis session and the interviews were then consolidated into the following ten major themes, which were used to inform the literature search (see **Box 1**).

Box 1: Ten major themes used to inform literature search

1. Drivers
2. Context
3. Culture
4. Leadership
5. Vision
6. Communication
7. Timescale
8. Unstated or unintended consequences
9. Human resource management
10. Complexity

Realist reviews differ from conventional systematic reviews in two key respects. First, there is no finite set of relevant papers that can be defined and then found; there are many more potentially relevant sources of information than any review could practically cover and so some type of purposive sampling strategy needs to be designed and followed (Pawson et al, 2005). Second, particularly in the literature being explored for this study, excluding all but a tiny minority of relevant studies on the grounds of methodological rigour would reduce rather than increase the validity and generalisability of the findings. Different studies contribute different elements to the rich picture that constitutes the overall synthesis; at the same time, however, priority was given to descriptive studies based on field research or case study experience over prescriptive pieces. Thus, more onus was placed on studies that outlined in detail how they had carried out their studies in terms of methodology and rationale, rather than those pieces that appeared as opinion or prescription where there was little or no evidence base presented alongside.

In accordance with this purposive approach, the terms for the key themes were combined with other more normative terms such as merger, acquisition,

organisation, restructuring and change in a search of the HMIC, ASSIA and EBSCO databases, and 1892 abstracts were obtained in all from this search. Guided by the project's focus on best practice principles, tools and techniques – along with an interest in leadership style, performance indicators and overall models and frameworks – these abstracts were purposively reviewed for designation of their inclusion/exclusion within the review. Of the identified papers, 276 were deemed to be appropriate of inclusion and the full texts were obtained.

Once the texts had been obtained, the team met once more and divided them thematically, according to the ten major themes earlier outlined. Realist synthesis works by an iterative and interactive process, involving tracking back and forth from the retrieved literature to the research questions and programme theories. Because useful studies in this respect will often make reference to companion pieces that have explored similar ideas, searching makes as much use of 'snowballing' (ie. pursuing references by hand or by citation-tracking devices) as it does of conventional database searching using terms or key words. Via this process, a further 49 items were identified to meet the inclusion requirements. **Table 1** illustrates these figures further.

This paper draws primarily on the part of the review that dealt with the theme of leadership; however, material in this category regularly incorporated other themes (such as communication). **Table 1** indicates the overall number of items that were reviewed within this theme.

Transformational and transactional

As previously outlined, the purpose of the review was to provide practical advice to managers and clinicians charged with leading organisational transition within the NHS. The NHS is currently undergoing a reorganisation of its commissioning function that has particularly significant implications for primary care trusts (PCTs), who are to be reconfigured into a smaller number of specialised agencies that focus primarily on commissioning services and activities that improve the health and health care of a local population. For the people charged with managing and governing PCTs, the coming two years represent a time of significant change and transition as PCTs merge, change their functions, and develop new skills and capacity to carry out those functions. For strategic health authorities (SHAs), there is similarly a time of great change ahead. SHAs are to be significantly reduced in number by the autumn of 2006 and they will assume new roles and responsibilities, largely as regional planners, market regulators and performance managers.

Despite overwhelming evidence that mergers and acquisitions fail to deliver the promised payoffs, companies in every industry continue to see them as the answer to their problems. There is no one simple reason for this vast amount of failure, *'the most important point is that merger and acquisition is inherently difficult'* (Huang & Kleiner, 2004: 54). Over the last 20 years, management of the so-

Table 1: Numbers of items identified and included in literature search

Articles identified in literature search	Items included from literature search	Further identified items	Duplicates	Items discussing leadership
1892	276	49	97	104
Total included	228			

called 'human factor' in organisational change has been recognised as an important source of success by an increasing number of authors (Kilmann *et al*, 1985; Bueno & Bowditch, 1989; Bijlsma-Frankema, 2001). All too often, human factors tend to take second place to commercial and financial considerations (Ranking, 1998). Organisational transition clearly involves change, and change tends to destabilise and cause stress in people. Research suggests that change: increases anxiety and decreases job satisfaction (Schweiger & DeNisi, 1991) and intensifies stress and tensions in everyday organisational life (Buono & Lombardi, 1996). Even when change is wanted and positively viewed, staff experience stress, uncertainty and loss (Shaw, 2002). Whatever else may be said about them, mergers seem to cry out for effective leadership and management; as Devine and Hirsh (1998: 24) put it: '*A merger or acquisition is a complex project and it needs conscious managing*'.

Although not adopted at the start, the review found the distinction between transformational and transactional useful in summarising the key messages from the literature considered within the theme of leadership of transition. Using the broad distinction outlined above, the literature on mergers and acquisitions suggests that some aspects of leadership are transformational (eg. articulating a picture of a new future) whilst others are transactional (eg. establishing mechanisms through which this articulation can be carried far and wide). Interestingly, and recognising that many of the papers covered aspects of both, the balance of guidance for leading transitions seems to lie on the transactional side of the seesaw. This is reflected in there being more than twice as many pieces of advice that the authors could derive and allocate to the transactional category than to the transformational. This perception of the balance is

necessarily impressionistic, but the analysis below seems to make a compelling case for the importance of rigorous transactional approaches in the leadership of organisations in transition (and, by extension, more generally). The next section explores those interventions, which seem to be best characterised as transformational, whilst the one after examines those that appear more transactional in their focus. In both cases, the use of the literature is illustrative rather than definitive (for a fuller account of the guidance and its origins see Dickinson *et al*, 2006b).

Transformational roles

Create and communicate a vision that sets out the purpose of the transition

Leaders of transition must articulate a clear vision for the merged organisation; having a clear purpose and vision to sustain both managers and staff is apparently crucial for the organisation, enabling people to see where the transition is heading and painting a picture of what the future organisation will be like. The development and communication of such an overall direction for the transition is very much a transformational task. The literature argues that leaders will need charisma and inspiration in creating a sense of human purpose for the experience that people are going through, and in modelling desired behaviour for the transition (eg. Appelbaum *et al*, 2000; DiGeorgio, 2003).

Adopt a participative and open style

The literature suggests that a participatory style of management is preferable to an authoritarian one during a time of transition. The style of leadership adopted by the most senior managers is significant in that it becomes a model for how leadership is enacted elsewhere in the organisation. For example, Cortvriend (2004), in a study of the impact of mergers in the NHS, concludes that staff

felt more positive about transition when they perceived a greater degree of consultation.

Attend to sense-making, helping people through the unpredictable elements of the changes and preserving routine for them where possible

Weick (1995) explained sense-making as follows: *'Active agents... "structure the unknown"... How they construct what they construct, why, and with what effects are the central questions for people interested in sense-making'* (p4). He describes the work of leaders in 'authoring' as well as reading their environment, and thus identifies a challenge for leaders in relation to how they shape the way in which organisational pasts, presents and, in particular in this context, futures are constructed by members of the organisation. These 'leaders' are the people who craft sense from the variety of materials they are faced with, and manage to construct a novel solution to a specific problem from them (Grint, 2005). In short, leaders of transitions have a key responsibility in shaping (as well as being shaped by) the changes, and in so doing, they shape the sense that other people make of what is happening (eg. Vaara, 2003).

Haspeslagh and Jemison (1991) suggest that there is a need for managers to adopt such an organisational process perspective in order to counter the overly 'rationalist' concerns of more procedural (and perhaps more transactional) approaches. Haspeslagh and Jemison postulate that the rationalist view of mergers fails to take into account all the sources of conflict that will impinge on both the acquisition decision and the implementation of the merger. They identify four significant factors in the decision-making process that introduce uncertainty or discord, including the differing perspectives on the acquisition held by different managers and the ambiguous

expectations of the benefit. Such factors will challenge leaders engaged in individual and collective interactions intended to shape the organisational sense-making that is going on during the transition.

Transactional roles

Managing the human resource should be the main activity of senior managers, and not just something that human resource professionals do

Research evidence underlines the crucial importance of attending to human resource management as the central activity during a process of organisational merger or transition (Devine & Hirsh, 1998; Swanson & Power, 2001; Aguilera & Dencker, 2004; Jeris *et al*, 2002). Indeed, as noted above, when it comes to explaining the causes of failed mergers, it is often the neglect of cultural and human issues (in favour of commercial and financial considerations) that is found to be the problem.

The literature is compelling in its emphasis on the importance of rigorous human resource management within organisational transition; it suggests that it should be the core business of all senior and general managers and not something that can be hived off to personnel or human resource specialists (although these people clearly have a vital role to play within the wider management of people in transition). More than anything else, human resource management within a process of transition requires constant and detailed attention by senior managers to transactional activities, making sure that communication, staff support, recruitment, retention, redundancies, (re)training and development, and post-merger integration work effectively (eg. Epstein, 2004).

Communicate the changes and latest developments relentlessly for people will be hungry for information

Tourish and Hargie (1998) report that there is evidence that *'in times of difficulty those organisations where careful attention is paid to communication by management have been shown to perform more successfully on a range of criteria than do those where such communication is poor'* (p54). Nguyen and Kleiner (2003) have as one of their eight 'golden rules' of mergers – rules derived from extensive document analysis of and executive interviews within organisations that have been through such a transition – the exhortation: *'focus on communication'* (p450); *'communication plays a critical role to the success of mergers'* (p452). Furthermore, delays in communication are identified as one of four reasons why some mergers that they studied had failed. They argue that providing clear, consistent, factual, sympathetic, and up-to-date information in several areas will increase the coping abilities of employees.

This is presumably why Nguyen and Kleiner have as another of their 'golden rules': *'directors must get out of the boardroom ... merger success requires hands-on leadership'* (p450). Jeris *et al* (2002) reported that if the top managers *'could go back and do it over, they would increase the communication ... to smooth the transition'* (p10) and similarly, Hubbard and Purcell (2001) identify quality and consistency of communication, as well as believability of information, as three of the key issues in managing the transitions (with reductions in the credibility of leadership being as connected to miscommunication as to lack of action).

Set up clear transitional structures that incorporate senior people, and that are able to enact the transition promptly

Having a clear transitional structure to guide and

implement a process of merger is underlined as a critical success factor in the research literature. A 'transitional structure' is *'a temporary system that usually lasts three to six months... to provide for the co-ordination and support during implementation of change'* (Marks & Mirvis, 2000, p36). The purposes that are served by such structures are:

- knowledge building – a setting where the staff of the two (or more) partners can work out the best ways of bringing themselves together based on fine grain understandings of their similarities and differences
- relationship building – a series of meetings within which a cross-section of employees from the organisations involved get a chance to explore differences in styles and culture and to build trust
- transition management – an opportunity for the senior members to share some of the practical tasks of merger with a wider range of colleagues
- communication management – a method for involving significant numbers of staff in ongoing exchanges of information and ideas about the merger (Marks & Mirvis, 2000).

There is significant support for these prescriptions elsewhere in the literature, with authors pointing to the importance of maximising staff involvement in transitional arrangements as a way of generating momentum, and identifying problem areas early, and as a means of ensuring a degree of bottom-up planning. Nonetheless, whilst research has also pointed to the significance of the organisational change management role, it also notes that its importance does not seem to be reflected in organisational practice (Buchanan *et al*, 1999). These authors note: *'the role of the change agent is poorly defined and poorly understood in many*

organisations and [...] the contribution of the change agent to the management of the change process is not fully recognised, is poorly supported and encouraged, and is inadequately rewarded' (Ibid, 1999: 31).

Focus on the psychological and development needs of staff

Leaders in transition must pay careful and continuous attention to the psychological needs of staff and managers. This is for two main reasons. First, it enables staff to benefit from necessary personal support. Second, it helps honour the employer's side of the psychological contract between the employer and the employee.

Hendel (1998), in her account of the merger of two hospital obstetric divisions, reports that *'a painful, social-psychological effect was felt by most members of the organization undergoing the merger; this was characterized by a loss of status identity ... one can compare the experience to the grief process'* (p283); and a similar metaphor of bereavement is deployed by Marks and Mirvis (2001) although these analogies may be quite different in other sectors. In response, leaders created *'supportive resources for employees ... small group discussions and individual talks for support and the sharing of feelings, talking about grief and loss'* (Hendel, 1998: 238). Devine and Hirsh (1998: 7) report that *'employees are often hit by waves of anxiety and need to be supported through the transition'* and they underline the importance of managers' roles, behaviours and attitudes in influencing how well employees cope with the changeover and adjustment.

In a similar vein, Hubbard and Purcell (2001) conclude that *'failure to manage expectations in the early period can cast a long shadow over subsequent attitudes towards the company*

management' (p30). To avoid this happening, they suggest that leaders are mindful of the importance of:

- trust in management action
- the credibility of their leadership
- fairness of action
- perceived logic of management action or behaviour.

Assess/audit the culture of each of the merging organisations and use this knowledge as part of a careful strategy for highlighting and recognising the differences between the organisations.

Research suggests that leaders of transition need to pay attention to those 'informal structures' thought of as culture. Cartwright and Cooper (1994; 1998) have focused attention on the cultural characteristics of companies and how these can affect the outcomes of merger activity, arguing that the degree of 'cultural fit' can be critical in determining the outcome of the merger and that the merger of some cultural types is more successful than others. At the same time, many commentators view 'culture' as a concept that should be handled with care (eg. Meyerson & Martin, 1987); many doubt whether organisational cultures are readily amenable to management manipulation (Parker, 2000).

Nonetheless, the transition literature suggests considerable time should be spent pre-merger in assessing the suitability of cultural fit between potential merger partners, and if a suitable fit is not detected, the change should not go ahead. This audit in itself will not quell any potential troubles, but is intended to highlight the areas where troubles may arise during the remainder of the change process (See Tetenbaum, 1999; Ashkenas et al, 1998).

Measure the impact of the transition and do this for at least three years

The detailed tracking of a merger's aftermath is advocated by many researchers who have undertaken extensive research into mergers and acquisitions (eg. Marks & Mirvis, 1992; Epstein, 2004; Fulop *et al*, 2005). Marks and Mirvis (1992) suggest that there are three reasons for carrying out such evaluation:

- to ascertain whether the new organisation is on course to achieve its goals
- to establish whether the organisation came out of the transition damaged or strengthened
- to tangibly show staff that the organisation's leadership really care about their active participation.

Conclusions

This review has underlined the importance of transactional management and leadership at times of organisational transition. In particular, the need for senior managers to heavily invest their own and others' time in the direct management of the human side of transition is highlighted, along with a requirement for specific attention to be paid to the psychological support needs of senior and middle managers. Relentless communication of the purpose and detail of changes is required, along with a range of personal, team and organisational development interventions. Careful evaluation and measurement of the transition is essential, if organisations are to be able to learn from the experience and use this learning when considering organisational merger as a tool for bringing about change in the future.

Nonetheless, despite plausible challenges to the over simplicity of this binary view of leadership (see Currie *et al*, 2005), this small study reveals that transformational leadership may have specific characteristics that should not be overlooked in the repertoire of effective leaders. Moreover, it seems that these transformational characteristics may be more appropriate in the earlier stages of the transition process, with the transactional characteristics required to stabilise transformational change. However, these transformational characteristics should neither be over emphasised nor seen as superior to the discipline and rigour of the elements viewed here as representing transactional leadership (or, as it was once known, management).

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