Advances in Leadership in Projects and Programs [1, 2]

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Abstract

The concept of project leadership is moving away from traditional leadership theories, which viewed project managers as charismatic, transactional and transformational leaders. Recently, there has been a movement towards studying leadership as a process carried out by different members of a project based on the context. This has led to research on the relationship between the leadership of the project manager and that of team-based leaders. Moreover, recent theories of leadership such as authentic and servant leadership are also being discussed as relevant in project management contexts. In addition, the ethical and moral responsibilities of project leaders is becoming important due to its importance in permanent organizations. In this article, the authors report on their research on these trends and hope that their work will inspire other project management researchers to carry out further research on project leadership.

Moving from traditional leadership theories

The traditional view of leadership in projects has focused mainly on the project manager. A history of project management (Chiu 2010) identifies the charismatic or heroic roles of master builders as project managers who 'held a premier position in society and drove the vision funding, design, and construction of historic structures and improvements' (Flavell 2011, p. 79). Historic monuments like the Pantheon were built by Roman master builders.

A more contemporary view of a project leader is that of a transactional leader (Northouse 2016). This is due to the view that a project manager is an agent carrying out a specific task or project on behalf of the principal or project owner (Keegan & Den Hartog 2004). The project is viewed as a temporary organization set up to carry out a transaction (Turner & Müller 2003). However, as projects became larger and more complex, a transformational leadership (Northouse 2016) style became relevant to project managers (Turner & Müller 2006).

[1] This paper is based on a presentation by the authors during the Project Management South Africa (PMSA) 2021 National Project Management Conference held virtually in November 2021. The PMWJ was a media partner for that event. To learn more about PMSA and their events, visit https://www.projectmanagement.org.za/. For more on the subject of this article, see the author profiles at the end of this article and contact the authors directly.

[2] How to cite this paper: Sankaran, S., Müller, R., Drouin, N. (2022). Advances in Leadership in Projects and Programs; *PM World Journal*, Vol. XI, Issue IV, April.

More recently, the view of the project manager as sole leader of a project has been challenged by team-based leadership theories such as distributed leadership (Lindgren & Packendorff 2009) and shared leadership (Clarke 2012)

Balanced Leadership

The authors of this article developed the theory of balanced leadership through a Project Management Institute (PMI)-sponsored research program that was carried out between 2016 to 2017, which has now, in addition to several journal articles, been published as a book (Müller, Drouin. & Sankaran, 2021).

The authors undertook this research to study project reality beyond the dichotomous understanding of team-based and person-based leadership. They wanted to develop an integrated view of project leadership and examine how such a view contributes to a project's success.

A mixed methods approach was used to collect data. Data was collected by nine research teams comprised of 22 researchers from nine countries – Australia, Canada, China, India, Lithuania, The Netherlands, Norway, South Africa and Sweden. In total, 54 case studies (Yin 2018) were conducted resulting in 278 interviews. These case studies were followed by a global survey, which resulted in 174 responses. The qualitative data were collected and analysed using the Miles, Huberman and Saldana (2014) approach. The survey data were analysed using partial least squares structural equation modelling (Hair et al. 2022)

After 33 case studies that resulted in 166 interviews were completed, a workshop was conducted at the BI Norwegian Business School in Oslo with six researchers selected from different countries to develop a theory using a method called the 'mystery construction technique' (Alvesson & Kärreman 2007). The mystery construction technique uses an abductive process that uses data to have a dialogue between theoretical frameworks and empirical data.

Using this abductive process, the researchers concluded that the patterns found from the data collected mirrored Archer's (1995) realist social theory and its morphogenetic cycle based on critical realist philosophy. This philosophy believes that 'a real world exists independently of our perceptions' while at the same time accepts that 'our understanding of this world' is a construction for our own perspectives (Maxwell 2012, p. 5). Using critical realism also supported the mixed methods approach used in the study.

The morphogenetic cycle involves three phases separated in time that result from the interactions between social structures and human agency. These are: structural conditioning, social interaction and social elaboration. This is now illustrated using an example. An organisation may decide to move from a waterfall methodology to an agile methodology in order to move away from an output focus to an outcome focus in delivering its projects. To drive the change the organisation may change its structure to be more organic than mechanistic. Once

this new structure is established, project teams working in the new structure (as agents) may influence the structure by suggesting modifications as the new structure begins to create issues with delivering projects. As a result of the interaction between structure and agency, a change in the structure could result in a blended approach to project delivery (called morphogenesis) or the management may stick to its strategy to move on (morphostasis). The result of these interactions result in what is known as elaboration. The three processes may continue until a good balance between structure and agency is found.

Based on the morphogenetic cycle, a theory of balanced leadership was proposed using five events that were identified from the study as shown in Figure 1.

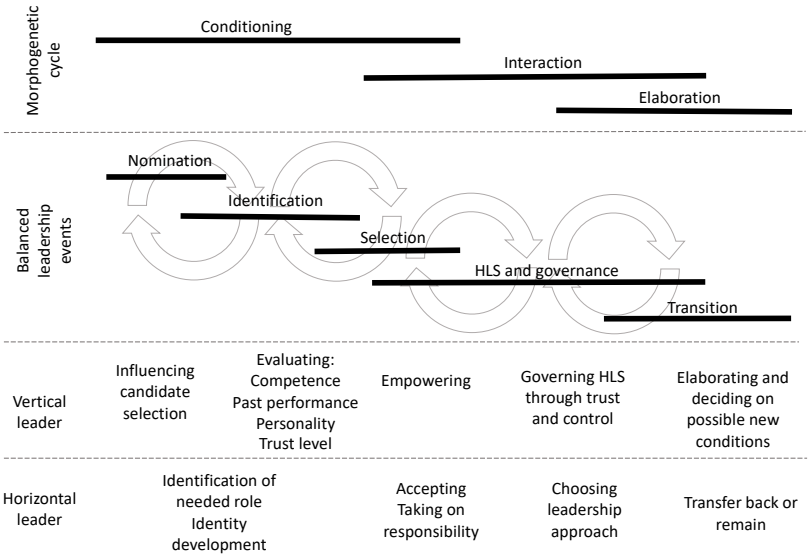

Figure 1 – Theoretical frame of Balanced Leadership (Müller et al. 2018, p.89)

The five events identified to match the morphogenetic cycle are:

Nomination, when people get assigned to project teams with or without the influence of the project manager.

Identification, when the project leader identifies team members who may have the capability to lead specific tasks in the project.

Selection, when the project leader works consciously to empower a selected team member to take on a leadership role when it arises.

Horizontal leadership and governance, when the team member is asked to lead a task supported by the project manager (governance).

Transition, when the task is handed back to the project manager after completion or when the project manager decides to take it back.

The bottom half of Figure 1 shows the activities of both the project manager (vertical leader) and the team member (horizontal leader) that enable the balanced leadership process.

The concept of horizontal leadership proposed through this research differs from previous views on shared or distributed leadership. Horizontal leadership is conceived as leadership that emerges on a conscious decision taken by the project manager (or vertical leader) to share or distribute the leadership of a task in the project using a clear process proposed by the theory of balanced leadership.

The authors further elaborate that the horizontal leader can apply well-known leadership styles including authentic and servant leadership to lead when entrusted with a task to lead and complete. This is also true of vertical leadership. Therefore, the term leadership in balanced leadership theory is an umbrella concept under which different leadership styles can be applied to suit the context.

In addition to the development of the theory, the authors also developed the coordination mechanism to enable balanced leadership to happen through a socio-cognitive space shown in Figure 2.

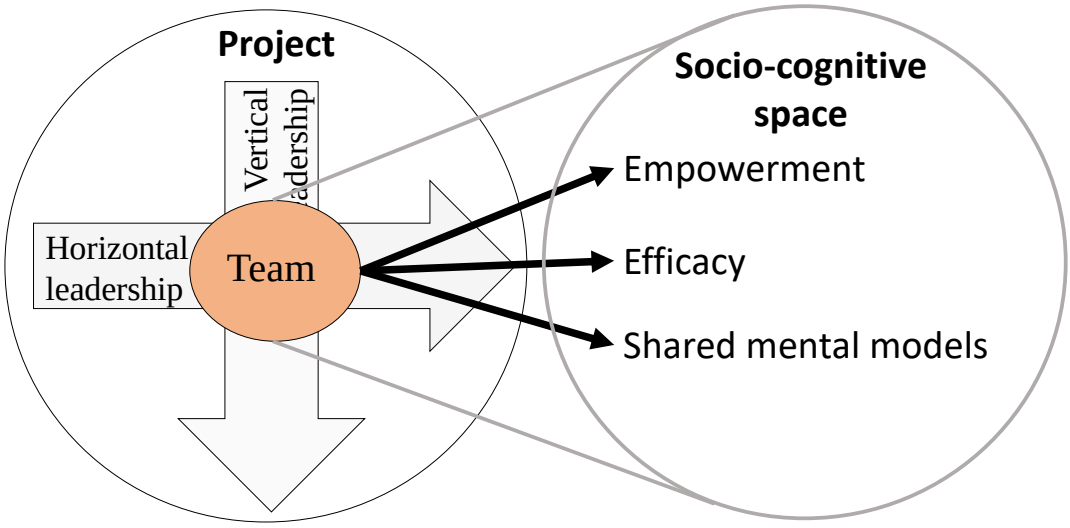

Figure 2 Socio-cognitive space and its elements (after Müller et al. 2015)

The socio-cognitive space has three components:

Empowerment is how project managers can empower team members to take up leadership roles.

Self-management is based on the efficacy of the team member who has the confidence to take on and execute the leadership role.

Mental model is the knowledge that the team member acquires about the capabilities of other team members who he/she can call upon to help with the task being led.

It was found through the study that the combination of vertical and horizontal leadership had a higher impact on project success, which is enhanced further by the components of the socio-cognitive space.

Megaproject leaders: Reflection on personal stories

The authors, along with Professor Alfons van Marrewijk, investigated megaproject leadership from a human perspective to identify new trends in megaproject management. They did this through collecting stories of real-life megaproject leaders around the world and capturing the lessons learnt from these stories. The outcomes from this study are now published as a book (Drouin, Sankaran, Marrewijk & Müller, 2021).

The stories for this study were collected by 18 well-known international academics from ten different countries: Australia, Canada, China, Germany, India, The Netherlands, New Zealand, South Korea, Switzerland, and the United Kingdom.

The study used a novel narrative data analysis methodology and developed a framework for the study based on time, relationships, and space across past, present, and future lives of these leaders.

The study revealed that megaproject leaders are paying increased attention to human capital and the socio-environmental dimensions of their projects. They also reflect on their own personal management styles to improve their capability to lead the projects. Turning points in their lives helped them to learn from experiences. These leaders also developed a greater awareness of project culture and intercultural differences.

The lessons learnt from the narratives pointed out the importance to megaproject leaders of mentors to build self-esteem, cultural awareness and development of professional skills to deal with the stress of leading megaprojects. Mentors included close family members, colleagues, other megaproject leaders under whom they learnt how or become megaproject leaders, teachers, and neighbours.

The study found that leaders developed their values based on the location or space where the projects were managed. Some leaders also took their values from their religious backgrounds and cultures in which they grew up.

The places where they worked enabled them to learn new ways of working that helped them to change the attitudes of members of their projects. The issues they faced in their projects forced them to find innovative ways to deal with conflicting interests of different stakeholders.

Conclusions

Leadership is becoming critical to the successful delivery of projects – both traditional projects and megaprojects. The leadership theories used in project management are changing as well. The authors of this article developed the theory of balanced leadership to explain a phenomenon not addressed by vertical and shared/distributed leadership by addressing the relationship between team members in leadership roles and vertical leaders. The authors also found that authentic leadership was important to deal with the complexities of megaprojects. Recent research in agile projects indicates that scrum leaders need to be servant leaders. Project leaders are also expected to be responsible leaders as the projects they manage could lead to ethical issues and result in disasters if they are not managed well. All this confirms that project leadership is an area of research that is increasing in importance. Therefore, the authors hope that through this article they will inspire other project management researchers to investigate issues related to project leadership.

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