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ARTICLE *in* THE LEADERSHIP QUARTERLY · JUNE 1999

Impact Factor: 2.7 · DOI: 10.1016/S1048-9843(99)00013-2

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# AN EVALUATION OF CONCEPTUAL WEAKNESSES IN TRANSFORMATIONAL AND CHARISMATIC LEADERSHIP THEORIES

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Theories of transformational and charismatic leadership provide important insights about the nature of effective leadership. However, most of the theories have conceptual weaknesses that reduce their capacity to explain effective leadership. The conceptual weaknesses are identified here and refinements are suggested. The issue of compatibility between transformational and charismatic leadership is also discussed. Finally, some methodological problems involving construct validation and theory testing are identified, and suggestions for future research are provided.

## INTRODUCTION

In the 1970s, behavioral theories of leadership effectiveness were dominant. Examples include path-goal theory (House & Mitchell, 1974), LMX theory (Graen & Cashman, 1975), and normative decision theory (Vroom & Yetton, 1973). Since the late 1980s, theories of transformational and charismatic leadership have been ascendant. Versions of transformational leadership have been proposed by several theorists, including Bass (1985, 1996); Bennis and Nanus (1985), Burns (1978), Sashkin (1988), and Tichy and Devanna (1986, 1990). Building on the ideas of Weber (1947), refined versions of charismatic leadership have been proposed by several theorists, including Conger (1989), Conger and Kanungo (1987, 1998), House (1977), and Shamir, House, and Arthur (1993).

Unlike the “traditional” leadership theories, which emphasized rational processes, theories of transformational and charismatic leadership emphasize emotions and values. The newer theories also acknowledge the importance of symbolic behav-

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ior and the role of the leader in making events meaningful for followers. These theories help us understand how a leader can influence followers to make self-sacrifices, commit to difficult objectives, and achieve much more than was initially expected. By providing an explanation for the exceptional influence some leaders have on followers, the theories appear to make an important contribution to our understanding of leadership processes.

Many writers have described the positive aspects of the new theories, but few have examined the conceptual weaknesses. The purpose of this article is to make a critical evaluation of the most widely known theories of transformational and charismatic leadership (Bass, 1985, 1996; Conger & Kanungo, 1998, 1998; House, 1977; Shamir et al., 1993). The emphasis is on conceptual issues. I do not provide a comprehensive review of the empirical research, but research is discussed when it is relevant for evaluating construct validity or testing the theories.

The conceptual weaknesses in transformational leadership theory are examined first, followed by an examination of conceptual weaknesses in charismatic leadership theory. The conceptual weaknesses I found are similar to those in most earlier leadership theories, and they include ambiguous constructs, insufficient description of explanatory processes, a narrow focus on dyadic processes, omission of some relevant behaviors, insufficient specification of limiting conditions (situational variables), and a bias toward heroic conceptions of leadership. Then I discuss the issue of compatibility between transformational and charismatic leadership. The final section provides a summary and conclusions. Throughout the article I make suggestions for improving the theories and point out additional research that is needed to evaluate them.

## TRANSFORMATIONAL LEADERSHIP

The version of transformational leadership theory that has generated the most research was formulated by Bass and his colleagues (Bass, 1985, 1996). They define transformational leadership primarily in terms of the leader's effect on followers, and the behavior used to achieve this effect. The followers feel trust, admiration, loyalty, and respect toward the leader, and they are motivated to do more than they originally expected to do. The underlying influence process is described in terms of motivating followers by making them more aware of the importance of task outcomes and inducing them to transcend their own self interest for the sake of the organization. Transformational leadership is differentiated from transactional leadership, which involves an exchange process to motivate follower compliance with leader requests and organization rules.

Different behaviors are involved in transformational and transactional leadership. The behaviors are measured with the Multifactor Leadership Questionnaire (MLQ), which is usually administered to subordinates who rate how frequently their leader uses each type of behavior. The content of the MLQ has varied somewhat over time, and additional transformational and transactional behaviors have been added to the recent versions (Bass, 1996; Bass & Avolio, 1990). Transformational leadership includes individualized consideration, intellectual stimulation, idealized influence (charisma), and inspirational motivation. Transactional leadership

includes contingent reward behavior, passive management by exception, and active management by exception.

Most factor studies support the proposed distinction between transformational and transactional behavior (Bass, 1996), but a number of discrepancies have been found. Some studies find that positive reward behavior loads on the transformational factor instead of the transactional factor. Other studies find that laissez-faire leadership and passive management by exception form a separate factor rather than loading on transactional leadership (Den Hartog, Van Muijen, & Koopman, 1997; Lievens, Van Geit, & Coetsier, 1997; Yammarino & Bass, 1990).

There is considerable evidence that transformational leadership is effective. Most survey studies using the MLQ and similar questionnaires find that transformational leadership is positively related to indicators of leadership effectiveness such as subordinate satisfaction, motivation, and performance (Bass, 1998). In a meta-analytical review of 39 studies using the MLQ, Lowe, Kroeck, and Sivasubramaniam (1996) found that key elements of transformational leadership correlated positively with subordinate satisfaction and performance. Contingent rewarding (a transactional behavior) was also correlated positively with the criteria, although the results were weaker and less consistent. Descriptive studies based on interviews and observation also find that transformational leadership is effective in a variety of different situations (e.g., Bennis & Nanus, 1985; Tichy & Devanna, 1986).

### **Ambiguity about Underlying Influence Processes**

The underlying influence processes for transformational and transactional leadership are still vague, and they have not been studied in a systematic way. Influence processes that involve a series of dyadic interactions over time include instrumental compliance, personal identification, and internalization (Kelman, 1958, 1974). These influence processes provide a useful way to explain the effects of a leader on subordinate attitudes, motivation, and behavior. Another way to describe leader influence on followers is in terms of the short-term effects of a leader's behavior on mediating variables relevant to task performance, such as arousal of motives or emotions, increased self-efficacy or optimism, modification of beliefs about reward contingencies, and increased task commitment. The theory would be stronger if the essential influence processes were identified more clearly and used to explain how each type of behavior affects each type of mediating variable and outcome.

### **Overemphasis on Dyadic Processes**

Most theories of transformational leadership are conceptualized primarily at the dyadic level. The major interest is to explain a leader's direct influence over individual followers, not leader influence on group or organizational processes. Examples of relevant group-level processes include: (1) how well the work is organized to utilize personnel and resources; (2) how well inter-related group activities are coordinated; (3) the amount of member agreement about objectives and priorities; (4) mutual trust and cooperation among members; (5) the extent of member identification with the group; (6) member confidence in the capacity of the group to attain its objectives; (7) the procurement and efficient use of resources; and (8)

external coordination with other parts of the organization and outsiders (Yukl, 1981, 1998). How leaders influence these group processes is not explained very well by the transformational leadership theories.

Organizational processes also receive insufficient attention in most theories of transformational leadership. Leadership is viewed as a key determinant of organizational effectiveness, but the causal effects of leader behavior on the organizational processes that ultimately determine effectiveness are seldom described in any detail. One essential leadership function is to help the organization adapt to its environment and acquire resources needed to survive (Hunt, 1991; Yukl, 1998). Adaptation is increased by gathering and interpreting information about the environment, identifying core competencies that provide a competitive advantage, developing effective strategies, promoting a favorable image of the organization and its products, gaining cooperation and support from outsiders, and using political tactics to implement change. Survival and prosperity also depend on the efficiency of the transformation process used by the organization to produce its products and services. Efficiency is increased by finding more rational ways to organize and perform the work, and by deciding how to make the best use of available technology, resources, and personnel. Thus, another essential leadership function is to influence the organization culture, structure, technology, and management systems.

The theories proposed by Tichy and Devanna (1985) and Bennis and Nanus (1986) emphasize organizational processes much more than the theory by Bass (1985, 1996), but all of the transformational leadership theories would benefit from a more detailed description of leader influence on these processes.

### **Ambiguity about Transformational Behaviors**

The identification of specific types of transformational behavior seems to be based mostly on an inductive process (factor analysis), and the theoretical rationale for differentiating among the behaviors is not clearly explained. Each transformational behavior includes diverse components, which makes the definition more ambiguous. The partially overlapping content and the high inter-correlation found among the transformational behaviors raise doubts about their construct validity.

The scale on individualized consideration includes both supporting and developing, which are distinct behaviors with somewhat different effects on subordinates (Bradford & Cohen, 1984; Kim & Yukl, 1996; Yukl & Nemeroff, 1978; Yukl, Wall, & Lepsinger, 1990). Developing includes coaching and mentoring. Supporting includes being friendly, helpful, considerate, and appreciative of individual subordinates. It is reasonable to treat developing as a core transformational behavior, because it enhances subordinate skills and self-efficacy. However, there does not seem to be a good rationale to include supporting as a core transformational behavior. This leadership behavior has been studied for nearly a half century (e.g., Fleishman, 1953); there is ample research to show that it increases satisfaction with the leader (and leader-member relations), but has only a weak effect on subordinate motivation or performance (Bass, 1990; Yukl, 1998).

Intellectual stimulation is operationally defined as causing a subordinate to ques-

tion traditional beliefs, to look at problems in a different way, and to find innovative solutions for problems. The content is diverse and ambiguous. There is not a clear description of what the leader actually says or does to influence the cognitive processes or behavior of subordinates. For example, what does the leader do to encourage creative problem solving? Another source of ambiguity is that some aspects of intellectual stimulation appear to overlap with aspects of individualized consideration or inspirational motivation.

The scale on idealized influence has very diverse content. Examples of the component behaviors include leader expression of beliefs, acting consistent with espoused beliefs, emphasizing the importance of subordinate beliefs, clarifying the purpose of subordinate activities, and talking about the importance of mutual trust (Bass & Avolio, 1990). Sometimes idealized influence also includes attributed charisma (Bass, 1996), which is an outcome rather than an observable behavior. Finally, idealized influence is not clearly differentiated from inspirational motivation, and there appears to be considerable overlap between these two behavior constructs.

### **Ambiguity about Transactional Leadership**

Transactional leadership is defined as a process of leader-subordinate exchange, but the theory fails to make a strong link between this process and each of the transactional behaviors. Instead, transactional leadership includes a diverse collection of (mostly ineffective) leader behaviors that lack any clear common denominator.

Contingent reward behavior includes things that are clearly involved in an impersonal exchange process (e.g., explaining reward contingencies, offering incentives, rewarding good performance). However, contingent reward behavior also includes providing recognition to subordinates, which is a distinct type of behavior (Yukl, 1998). Providing praise and recognition is usually more personal and may involve transformational leadership as well as transactional leadership.

The operational definition of passive management by exception is that the leader waits until performance problems are serious before responding to them (Bass & Avolio, 1990). The theoretical rationale for including this behavior as part of transactional leadership is not evident. It is a reactive behavior that does not explicitly involve an exchange process. Moreover, the scale items do not describe how the leader deals with performance problems. One response (contingent punishment) that may involve exchange processes is not explicitly measured.

Active management by exception is defined operationally in terms of looking for mistakes or enforcing rules to avoid mistakes. The scale items emphasize intrusive, controlling forms of monitoring, and there is no description of what the leader does to correct mistakes or problems when they are discovered. Monitoring of subordinate performance can be done in a variety of ways (see Yukl, 1998), and it can facilitate transformational leadership as well as transactional leadership. The theoretical rationale for including active management by exception as part of transactional leadership is not clearly explained and is not evident.

### Omission of Important Behaviors

Some important transformational behaviors are missing in the Bass (1996) version of the theory and in the MLQ, which was designed to test the theory (Bass & Avolio, 1990). The missing behaviors can be identified by examining other theories and research on effective leadership. The core transformational behaviors at the dyadic level of analysis should probably include inspiring (infusing the work with meaning), developing (enhancing follower skills and self-confidence), and empowering (providing significant voice and discretion to followers). Note that I am using the narrow definition of empowering here, and it means only power sharing (not actions to increase follower optimism and self-efficacy). At the group level of analysis, the core transformational behaviors should probably include facilitating agreement about objectives and strategies, facilitating mutual trust and cooperation, and building group identification and collective efficacy. At the organizational level of analysis, the core transformational behaviors should probably include articulating a vision and strategy for the organization, guiding and facilitating change, and promoting organizational learning.

Since the theory deals primarily with dyadic processes, it is not surprising that there is better coverage of transformational behaviors at the dyadic level than at the group and organizational levels. Inspiring and developing are well represented in the MLQ. However, important empowering behaviors such as consulting, delegating, and sharing of sensitive information are not directly represented in the MLQ. Bass (1996) has contended that transformational and transactional leadership can be either directive (autocratic) or participative, but this is a weak argument for excluding behaviors that seem so directly relevant to the influence processes underlying transformational leadership. Participation and delegation involve internalization when feelings of ownership for a decision link it more closely to a follower's self-concept and self worth.

Although no single theory should be expected to include all aspects of leadership behavior, use of the label "full range leadership theory" by Bass (1996) invites critical evaluation of completeness. A full range theory should include not only the missing transformational behaviors mentioned earlier, but also types of behavior that are not part of either transformational or transactional leadership. One obvious omission is task-oriented behavior relevant for effective leadership (e.g., clarifying expected results, setting specific task goals, operational planning, coordinating activities, allocating resources, monitoring operations in a non-obtrusive way). Another omission involves leader interaction with superiors, peers, and outsiders whose information, cooperation and political support are essential for a group's performance of its mission (e.g., networking, acting as spokesperson for the group, negotiating agreements, persuading people to provide political support and necessary resources, resolving problems and conflicts with outsiders).

That so many important behaviors are missing from the MLQ casts doubt on the validity of the research conducted to evaluate the two-factor taxonomy of transformational and transactional leadership. The content of a questionnaire affects the factor structure found for it. Studies using a questionnaire with a richer variety of behaviors have found a more complex factor structure (e.g., Den Hartog, 1997;

House, Delbecq, & Taris, 1997; Podsakoff, MacKenzie, Moorman, & Fetter, 1990; Yukl, 1997).

### **Insufficient Specification of Situational Variables**

The theories of transformational leadership assume that the underlying leadership process and its outcomes are essentially the same in all situations. Bass (1996, 1997) has proposed that transformational leadership is beneficial for followers and their organization, regardless of the situation. In support of this position, the positive relationship between transformational leadership and effectiveness has been replicated for many leaders at different levels of authority, in different types of organizations, and in several different countries (Bass, 1997, 1998). Nevertheless, several theorists have proposed that situational variables may increase the likelihood of transformational leadership or moderate its effect on followers (Bass, 1985, 1996; Pawar & Eastman, 1997; Pettigrew, 1987). The proposed conditions include an unstable environment, an organic structure (rather than a mechanistic bureaucracy), an entrepreneurial culture, and dominance of boundary-spanning units over the technical core. As yet only a few studies have tested these propositions (see Bass, 1996; Podsakoff, MacKenzie, & Bommer, 1996), and there is still not much evidence of important moderator variables.

The search for situational moderator variables may be more successful if directed at specific types of transformational behavior. Even if there is always some type of transformational behavior that is relevant for effective leadership, not every type of transformational behavior will be relevant in every situation. Because of the high inter-correlation among transformational leadership scales in the MLQ, the survey studies have not been useful for assessing the separate effects of these component behaviors. The descriptive studies on transformational leadership also fail to provide a good basis for assessing facilitating or limiting conditions.

To identify situational moderator effects, more accurate measures of leader behavior should be used (e.g., observations, diaries) instead of relying so much on behavior questionnaires. This research should include independent sources of information about leader behavior, mediating variables, outcome variables, and situational variables. More field experiments are also needed to assess the causal effects of different transformational behaviors. Only one field experiment has been conducted to date on the theory (Barling, Weber, & Kelloway, 1996), and the researchers did not attempt to manipulate different transformational behaviors independently or to assess the effects of mediating and situational variables. Laboratory experiments (e.g., Kirkpatrick & Locke, 1996) may also be useful. However, to ensure that the key influence processes in transformational leadership actually occur, it is desirable to have a simulation that extends over several weeks and involves a meaningful task.

### **Insufficient Identification of Negative Effects**

The theory does not explicitly identify any situation where transformational leadership is detrimental. However, the possibility that transformational leadership can have negative outcomes for followers or the organization has been noted by

several writers. Stephens, D'Intino, and Victor (1995) contend that transformational leadership theory, like other theories that emphasize the role of leadership in increasing task motivation and performance, is biased toward favoring some stakeholders (top management, owners, customers) at the expense of others (most of the employees). Harrison (1987) proposed that followers can be transformed to such a high degree of emotional involvement in the work that over time they become "burnt out" by the prolonged stress. Individual leaders can exploit followers (even without realizing it) by creating a high level of emotional involvement when it is not necessary. Seltzer, Numerof, & Bass (1987) conducted a survey study to examine the relationship between transformational leadership and subordinate stress. They found it reduced stress, but the possibility of adverse longitudinal effects could not be evaluated with their cross-sectional design.

Porter and Bigley (1997) proposed that transformational leadership can have some other detrimental consequences for the organization. If members of an organization are influenced by different leaders with competing visions, the result will be increased role ambiguity and role conflict. Leaders who build strong identification with their subunit and its objectives can improve member motivation, but excessive competition may arise among different subunits of the organization. When interunit cooperation is necessary to achieve organizational objectives, the result can be a decline in organizational effectiveness. The possibility that transformational leadership has negative outcomes needs to be investigated with research methods designed to detect such effects.

### **Heroic Leadership Bias**

Like most earlier leadership theories, the transformational leadership theories reflect the implicit assumptions associated with the "heroic leadership" stereotype (Calder, 1977; Meindl, Ehrlich, & Dukerich, 1985). Effective performance by an individual, group, or organization is assumed to depend on leadership by an individual with the skills to find the right path and motivate others to take it. In most versions of transformational leadership theory, it is a basic postulate that an effective leader will influence followers to make self-sacrifices and exert exceptional effort. Influence is unidirectional, and it flows from the leader to the follower. When a correlation is found between transformational leadership and subordinate commitment or performance, the results are interpreted as showing that the leader influenced subordinates to perform better. There is little interest in describing reciprocal influence processes or shared leadership. Researchers study how leaders motivate followers or overcome their resistance, not how leaders encourage followers to challenge the leader's vision or develop a better one.

An alternative perspective would be to describe leadership as a shared process of enhancing the collective and individual capacity of people to accomplish their work roles effectively. This alternative conception of leadership does not require an individual who can perform all of the essential leadership functions, only a set of people who collectively perform them. Some leadership functions (e.g., making important decisions) may be shared by several members of a group, some leadership functions may be allocated to individual members, and a particular leadership func-

tion may be performed by different people at different times. The leadership actions of any individual leader are much less important than the collective leadership provided by the members of the organization. The transformational leadership theory by Burns (1978) seems to take this perspective more than the others, but all of the theories would be improved by a more explicit description of the implications for distributed and shared leadership in groups and organizations.

## CHARISMATIC LEADERSHIP

The original charismatic leadership theory by Weber (1947) described how followers attribute extraordinary qualities (charisma) to the leader. In recent years, others have modified and extended this theory to describe charismatic leadership in formal organizations (Conger, 1989; Conger & Kanungo, 1988, 1998; House, 1977; Shamir and associates 1993). These theories describe charismatic leadership in terms of the amount of leader influence over followers and the type of leader-follower relationship that emerges.

The core behaviors in charismatic leadership vary somewhat from theory to theory, and sometimes from older to newer versions of the same theory. The key behaviors in the Conger and Kanungo (1988, 1998) theory include articulating an innovative strategic vision, showing sensitivity to member needs, displaying unconventional behavior, taking personal risks, and showing sensitivity to the environment (identifying constraints, threats, and opportunities). The key behaviors in the House (1977) and Shamir et al. (1993) theories include articulating an appealing vision, emphasizing ideological aspects of the work, communicating high performance expectations, expressing confidence that subordinates can attain them, showing self confidence, modeling exemplary behavior, and emphasizing collective identity. Some researchers have further differentiated between the content of the vision and the use of an expressive style to communicate it (e.g., Kirkpatrick & Locke, 1996).

The research designed to test charismatic leadership theories has employed a wide variety of methods, including survey field studies, laboratory experiments, scenarios, content analysis of biographies and historical accounts, and case studies that compare different leaders or the same leader in different situations. The research provides evidence that supports some aspects of the major theories, but most of the propositions in these theories have yet to be tested adequately.

Only recently have behavior questionnaires been developed for testing the charismatic theories. Shamir, Zakay, Breinin, and Popper (1998) developed a questionnaire to measure four behaviors that may be involved in charismatic leadership: supporting, displaying exemplary behavior (similar to role modeling), emphasizing ideology, and emphasizing collective identity. As noted earlier, House, Delbecq, and Taris (1997) developed a questionnaire with scales measuring charismatic as well as transformational behaviors.

Conger and Kanungo developed a questionnaire (the C-K Scale) based on their charismatic leadership theory (Conger & Kanungo, 1994, 1998; Conger, Kanungo, Menon, & Mathur, 1997). Their validation studies established moderately good support for the overall measure of charismatic behavior. The correlation among subscales was much lower for the C-K Scale than for the MLQ, which suggests

that the behaviors are operationally defined more clearly and distinctly. The research also found that most of the charismatic behaviors were relatively independent of traditional leadership behaviors.

### **Ambiguity about Charisma**

There is widespread confusion about the meaning of charismatic leadership, due in part to differences among theorists in how they define it (Bryman, 1993). Most charismatic theories emphasize follower attributions of extraordinary qualities to the leader. Conger and Kanungo (1988, 1998) proposed that the attributions are determined jointly by characteristics of the leader, subordinates, and situation. In contrast, House (1977) and Shamir and associates (1993) have defined charismatic leadership in terms of how the leader influences follower attitudes and motivation, regardless of whether followers consider the leader extraordinary

There is need for more clarity and consistency in how the term charismatic is defined and used. The most useful definition seems to be in terms of attributions of charisma to a leader by followers who identify strongly with the leader. This definition maintains the original meaning of charisma and provides a basis for differentiating between charismatic and transformational leadership.

### **Ambiguity about Underlying Influence Processes**

The theorists also disagree about the relative importance of the underlying influence processes. Personal identification was the primary influence process in the initial version of the charismatic leadership theory proposed by Conger and Kanungo (1987). In their most recent version of the theory (Conger & Kanungo, 1998), personal identification is the primary process early in the relationship, but internalization becomes more important later in the relationship. The theory by Shamir and associates (1993) appears to emphasize internalization and collective identification more than personal identification. Which influence process is dominant may be very relevant for understanding leadership effectiveness (Howell, 1988; Kelman, 1974; Shamir, 1991).

When there is strong personal identification, followers are passionately devoted to an attractive leader with exceptional ability to find solutions to important problems confronting them. Followers desire to be like the leader and to gain the leader's acceptance and approval. They will imitate the leader's behavior, accept the leader's task objectives, comply with the leader's requests, and make self-sacrifices and an extra effort in the work to please the leader. In extreme cases, the follower's primary self identify may become service to the leader. Strong personal identification creates loyal, obedient followers, but it may inhibit them from providing feedback to the leader or showing initiative. They will be reluctant to disagree with leader, criticize the leader's plans, or deviate from them. They will tend to ignore or rationalize any evidence that the plans and policies proposed by their leader are unrealistic and impractical.

A somewhat different type of relationship seems likely when the primary influence process is internalization, and task objectives are linked to a follower's core

values and self-identity. When followers come to see their work roles as an important part of their self-identity, successful performance becomes very important for their self-acceptance and self worth. Followers will make self-sacrifices and exert extra effort in their work to facilitate achievement of the task objectives. In extreme cases, service to the cause may become a follower's primary self-identity. The dedication of subordinates to the mission will be stronger than any loyalty they feel to the leader. Followers are likely to express concerns about leader plans and policies that appear to be impractical or self-serving, and they may refuse to carry out a request that appears to endanger the mission or violate their core values.

The charismatic leadership theories would be improved by a better explanation of the underlying influence processes. How do personal identification, social identification, internalization, and instrumental compliance interact in determining the behavior of followers? Is one influence process more central than the others? How are these influence processes related to leader influence on follower self-identity, self-efficacy, and motive arousal? There has been little empirical research on the underlying influence processes in charismatic leadership, and it remains the most speculative aspect of the theories.

### **Overemphasis on Dyadic Processes**

Charismatic leadership theories are usually conceptualized at the dyadic level, and group processes do not receive enough attention. Group processes are important not only because they are necessary to explain how a leader can influence the performance of an interacting group, but also because attributions of charisma are unlikely to be the same for all group members. Charismatic leaders tend to polarize people into loyal followers and dedicated opponents (Bass, 1985). Only a few theorists have described group-level processes in relation to charismatic leadership. [Shamir and associates \(1993\)](#) described how a charismatic leader can influence follower identification with the group and perception of collective efficacy. Meindl (1990) proposed that mutual influence among group members might explain some attributions of charisma. Klein and House (1995) described the implications of homogeneous versus heterogeneous attributions of leader charisma among group members. All of the charismatic leadership theories would be strengthened by a better description of how the leader influences group processes such as goal alignment, member cooperation, mutual trust, collective self-efficacy, and identification with the group.

Some theories of charismatic leadership describe organization-level processes in relation to special topics, such as leadership succession and revolutionary change in an organization. However, the theories are still weak on explaining how charisma is institutionalized or a major change is actually implemented by the leader (Bryman, 1993). The most recent version of the Conger and Kanungo (1998) theory says more about these processes, but not enough to provide a clear understanding of them. The literature on cultural and strategic leadership by executives has increased over the past decade (see Finkelstein & Hambrick, 1996; Schein, 1992; Trice & Beyer, 1993; Zaccaro, 1996), but as yet it has not been integrated very well with the dominant theories of charismatic leadership.

### **Ambiguity about Essential Behaviors**

Differences among the theories with regard to the essential behaviors in charismatic leadership have created some ambiguity that should be resolved. The set of behaviors in the most recent version of the Conger and Kanungo (1998) theory is consistent with their initial theory and findings in their early research comparing charismatic to non-charismatic leaders (Conger & Kanungo, 1988). The theory proposed by Shamir and associates (1993) includes not only the initial set of behaviors proposed House (1977), but also some behaviors borrowed from other charismatic and transformational theories. The link between behaviors and explanatory processes is not always clear, and some of the behaviors appear to have been selected because they are relevant to leadership effectiveness rather than because they increase attributions of charisma.

Some behaviors that appear relevant for understanding charismatic leadership were overlooked in the theories and the related research. There seems to be a preference for socially acceptable behaviors rather than manipulative behaviors that increase follower perception of leader expertise and dependence on the leader. Some examples of these manipulative behaviors are the following: misinterpreting events or inciting incidents to create the appearance of a crisis; exaggerating the leader's positive achievements and taking unwarranted credit for achievements; creating the appearance of miracles; using staged events with music and symbols to arouse emotions and build enthusiasm; covering up mistakes and failures; blaming others for the leader's mistakes; limiting member access to information about operations and performance; limiting the scope of subordinate work roles; limiting communication of criticism or dissent; indoctrinating new members; using deference rituals and status symbols; and creating barriers to isolate members from contacts with outsiders.

### **Insufficient Specification of Facilitating Conditions**

There is still ambiguity about the necessary conditions for attributions of charisma. The essential characteristics of the leader have been discussed extensively, but the essential characteristics of followers have received less attention. The theories suggest that followers are more susceptible if they are insecure, alienated, fearful about their physical safety or economic security, they lack self-esteem, and they have a weak self identity. As yet there has been little empirical research to verify that such followers are more prone to attributions of charisma and strong personal identification with a leader. More effort should be made to identify relevant follower characteristics and explain how they are related to leader characteristics, underlying influence processes, and contextual variables.

The contextual variables are especially important for charismatic leadership, because attributions of exceptional ability for a leader seem to be rare and may be highly dependent upon characteristics of the situation. Several theorists have proposed situational variables that may enhance the likelihood of charismatic leadership (Bryman, 1992; Conger & Kanungo, 1998; Howell, 1998; Shamir et al., 1993). According to these theorists, charismatic leadership is more likely to occur when the environment is uncertain, there is a stressful crisis for the group or organization,

the task is complex and poorly defined, the task has ideological aspects that can be utilized in an inspiring vision, extrinsic rewards are not available or cannot be linked to goal attainment, the organization has an organic structure, and the leader has high position power (including control over information). In a somewhat different approach, Klein and House (1995) proposed characteristics of the followers and the situation that jointly determine how much variability occurs among group members in their attributions of leader charisma. As yet only a few empirical studies have been conducted to investigate contextual variables that foster charismatic leadership (e.g., House et al., 1991; House et al., 1997; Pillai & Meindl, 1991; Roberts & Bradley, 1988), and more research on this subject is needed.

One contextual variable that has been of special interest is the existence of a crisis. In Weber's (1947) theory a crisis was necessary for the emergence of a charismatic leader. In the more recent theories (Conger and Kanungo, 1988, 1998; Shamir et al., 1993), a crisis facilitates charismatic leadership but is not a necessary antecedent condition. In the absence of a real crisis, the leader may be able to interpret events in a way that exaggerates environmental threats, or the leader may covertly precipitate incidents that make a crisis seem more imminent (Boal & Bryson, 1988). Another alternative is the possibility that a leader can identify opportunities for significant innovations that will greatly benefit followers (Conger & Kanungo, 1998). For example, the CEO of a successful company initiates a joint venture, or a clever entrepreneur founds an organization to provide a new type of product or service. An uncertain, turbulent environment is probably a facilitating condition for charismatic leadership, because turbulence increases both the threats and opportunities for an organization. An interesting research question is whether the same behaviors and influence processes are associated with charismatic leadership in crisis and non-crisis situations.

### **Ambiguity about Reasons for Loss of Charisma**

Charisma is transitory: It can be gained or lost as conditions change (Bryman, 1992; Roberts & Bradley, 1988). Charismatic leadership theory needs a more detailed explanation of how charisma is lost by a leader. It is not clear to what extent the same conditions that facilitate the acquisition of charisma are also involved in its loss. It seems likely that attributions of charisma to the leader will diminish if the antecedent crisis ends, or if followers become more confident and capable of solving problems for themselves. Other possible reasons for loss of charisma include leader decisions that result in obvious failure, leader betrayal of followers, and the appearance of rivals who are even more attractive and credible than the leader.

Loss of charisma and the removal of a charismatic leader sometimes involve changes that occur over time in the organization led by a charismatic leader. Case studies and biographies of charismatic leaders who founded a new organization reveal that they can become victims of their own success (e.g., Weed, 1993; see also Bryman, 1992). As the organization grows larger and becomes more professional and bureaucratic, charismatic founders may be removed from office if their expertise is no longer unique, their impulsive unconventional behavior becomes dysfunctional, and they lack the position power to ensure their survival.

### **Ambiguity about Implications for Organizational Effectiveness**

Most proponents of charismatic leadership theory acknowledge the possibility that it can have negative as well as positive consequences for organizations. Several writers have presented reasons why it is not always feasible or desirable to have charismatic leaders occupy important positions in private and public sector organizations (Bryman, 1992; Conger, 1989; Hogan, Raskin, & Fazzini, 1990; House & Howell, 1992; Howell, 1988; Sankowsky, 1995; Trice & Beyer, 1993). Charismatic leadership implies radical change in the strategy and culture of an organization, which may not be necessary or appropriate. When people give substantial power to a leader with an appealing vision of a better future, the power is often misused while the vision remains an empty dream. Polarization of organization members into supporters and opponents can paralyze the organization with gridlock in the face of crises requiring immediate action. Charismatic leaders often fail to plan for a competent successor, resulting in a new crisis when they depart.

There has been little research to directly assess the practical implications of charismatic leadership for organizations. Most of our knowledge about the subject comes from historical accounts and descriptive studies of charismatic leaders. These studies reveal that charismatic leadership can have both positive and negative consequences for followers. Most of the descriptive studies on leaders of effective business organizations suggest that charismatic leadership is not necessary (e.g., Bennis & Nanus, 1985; Kouzes & Posner, 1987; Tichy & Devanna, 1986). Successful change is usually the result of transformational leadership by managers not perceived as charismatic. The vision is usually the product of a collective effort, not the creation of a single, exceptional leader.

Even though proponents acknowledge the "dark side" of charismatic leadership, the theories would be improved by further clarification of the conditions when charisma is necessary or desirable. The conception of a charismatic leader as someone extraordinary seems incompatible with the idea of extensive empowerment and shared leadership. Thus, a charismatic leader may be dysfunctional in a self-managed team, a cross-functional team, or a collegial professional organization. Charismatic leadership may be relevant only for a limited number of situations. Some likely examples include a visionary entrepreneur who overcomes difficult obstacles to establish a new organization, the guru of a new religious cult, a passionate revolutionary who successfully initiates a bottom-up change in an established organization with corrupt leadership, and an external "turnaround manager" who rescues an organization about to collapse because it has not adapted to environmental change. More research is needed with intensive, longitudinal designs to determine when and how charismatic leadership is effective in organizations.

### **TRANSFORMATIONAL VERSUS CHARISMATIC LEADERSHIP**

One of the most important conceptual issues for transformational and charismatic leadership is the extent to which they are similar and compatible. Some theorists minimize the differences between transformational and charismatic leadership (e.g., House & Shamir, 1993). It is now common practice in many books and articles to

treat the two approaches as equivalent. The assumption of equivalence has been challenged by leadership scholars (myself included) who view transformational and charismatic leadership as distinct but partially overlapping processes. Bass (1985) proposed that charisma is a necessary component of transformational leadership, but he noted that a leader can be charismatic without being transformational. Several writers have proposed that a leader can be transformational without being charismatic. A few writers have even suggested the possibility that the two types of leadership may be incompatible (Yukl, 1994).

Conceptual ambiguity and a lack of consistency in the use of terms make it difficult to compare transformational leadership to charismatic leadership. How much similarity one finds depends on which versions of the theories are compared. In recent years, the major charismatic theories have been revised in ways that appear to move them closer to the transformational theories. The major transformational theories have been revised to incorporate additional forms of effective leadership behavior. The term “transformational” has been broadly defined by many writers to include almost any type of effective leadership, regardless of the underlying influence processes. The label may refer to the transformation of individual followers or to the transformation of entire organizations.

If the two types of leadership are essentially similar, they can be integrated into a single theory. Similarity also means that it is justifiable to cite results from studies testing one theory as evidence for the other, which has become a common practice in the leadership literature. The amount of similarity between charismatic and transformational leadership is both a conceptual and empirical question. There is little reason for making a distinction between the two types of leadership unless they are defined in a way that involves important differences in underlying processes, and these differences can be verified by empirical research. The research should determine not only whether transformational and charismatic leadership can occur simultaneously in the same individual, but also whether this combination is common or rare, and whether it is stable or unstable over time.

I propose that the simultaneous occurrence of transformational and charismatic leadership is both uncommon and unstable. There is little reason to expect that the core behaviors in transformational leadership will automatically result in attributed charisma. In fact, the developing and empowering behaviors associated with transformational leadership seem to make it less likely that followers will attribute extraordinary qualities to the leader. The more successful the leader is in developing and empowering followers, the less dependent they will be on the leader for future advice and inspiration. In order for attributions of extraordinary expertise to be made by a substantial proportion of followers, some unusual facilitating conditions seem to be necessary (e.g., a prolonged crisis that followers are unable to cope with; an unusual opportunity that only the leader knows how to exploit). Moreover, it may also be necessary for the leader to engage in some behaviors that are not considered transformational (e.g., impression management, advocacy of radical change, use of risky nontraditional behaviors to promote change).

When attributions of charisma do occur for a transformational leader, they are unlikely to persist for very long without sustaining conditions and active efforts by the leader to maintain a heroic image. Consider, for example, a leader who has

helped the organization deal with a serious crisis or achieve an important objective not initially considered possible. Followers may view the leader as a hero with exceptional ability, but the attributions of charisma are likely to dissipate as a result of changing conditions and the leader's efforts to discourage them (e.g., by crediting success to the team, sharing unique expertise, avoiding the limelight, and declining more authority). If so, followers will still have strong respect and affection for the leader, but there will not be attributed charisma and intense personal identification.

Another possibility is that the leader will begin to believe that he or she really is exceptionally qualified to determine the fate of followers (Zaleznik, 1970; McClelland, 1975). A leader who succumbs to this temptation is likely to become increasingly autocratic, manipulative, and intolerant of dissent. If conditions favor continued dependence by followers, the eventual result will be a charismatic leader who is no longer transformational.

The least likely possibility is to remain both transformational and charismatic for a considerable period of time. This combination requires conditions that will sustain follower dependence and strong personal identification, plus a leader who really is exceptional, a person with unique, essential expertise as well as strong emotional maturity, integrity, and devotion to followers.

Research findings on the compatibility of transformational and charismatic leadership are inconsistent. Most survey research with the MLQ supports the proposition by Bass (1985) that charisma is an essential part of transformational leadership. In contrast, the descriptive studies of transformational leadership by chief executives find that these leaders are usually not considered to be charismatic by the members of their organization (Bennis & Nanus, 1985; Kouzes & Posner, 1987; Peters & Austin, 1985; Tichy & Devanna, 1986). Few of the leaders in this research were colorful, larger than life figures with adoring, obedient followers. Biographies and descriptive accounts of famous charismatic leaders in business, military, political, and religious organizations provide additional insights (see Bryman, 1992; Conger, 1998; Trice & Beyer, 1993). Some examples can be found of leaders who seem to be both charismatic and transformational, but they are rare. Most of the charismatic leaders did not appear to develop and empower followers in the way one would expect for a transformational leader. Although these leaders are good at managing impressions, a careful examination of their actions usually reveals that they are more interested in enhancing their own power and prestige than in providing selfless devotion to followers and the organization.

It is important to recognize that the existing research does not provide a definitive answer about the compatibility of transformational and charismatic leadership. Neither the survey studies nor the descriptive studies were designed to investigate this research question. The utility of the survey research is greatly reduced by the high multicollinearity among the behavior scales and the low level of measurement accuracy. The biographies and descriptive accounts seldom provide a complete and objective examination of the relevant variables. To find an answer to this important research question may require intensive, longitudinal research that measures not only leader characteristics, but also influence processes, follower characteristics and relevant aspects of the situation.

## SUMMARY AND CONCLUSIONS

It is evident that charismatic and transformational leadership theories provide important insights, but some serious conceptual weaknesses need to be corrected to make the theories more useful. They do not describe the underlying influence processes clearly, nor do they specify how the leader behaviors are related to these processes. It seems that instrumental compliance is most important for transactional leadership, internalization is most important for transformational leadership, and personal identification is most important for charismatic leadership. However, the relevance of these and other influence processes for each type of leadership is still largely a matter of speculation. As noted earlier, there has been little research on underlying influence processes. They are difficult to study, but they hold great promise for improving our understanding of effective leadership.

There is also considerable ambiguity about the essential behaviors for charismatic and transformational leadership. Many of the same behaviors appear relevant for both types of leadership, but there are some apparent differences in the pattern of behavior associated with each type of leadership. A transformational leader seems more likely to take actions that will empower followers and make them partners in a quest to achieve important objectives. A charismatic leader seems more likely to emphasize the need for radical change that can only be accomplished if followers put their trust in the leader's unique expertise. Incompatible aspects of the core behaviors for transformational and charismatic leadership may make it rare for both types of leadership to occur at the same time.

The conceptual weaknesses discussed in this article suggest some revisions that are needed to improve the theories of charismatic and transformational leadership. The focus on dyadic processes limits the utility of the theories for explaining leadership effectiveness at the group or organizational level. The dyadic perspective should be replaced by a systems perspective that describes leadership in terms of several distinct but inter-related influence processes at the dyadic, group, and organizational level. The inherent assumption of heroic leadership biases the theories toward explaining effectiveness in terms of the skills and actions of the leader. The theories should place greater emphasis on reciprocal influence processes and deal more explicitly with issues of shared and distributed leadership.

The emphasis on universal applicability has been too strong. More attention is needed to identify facilitating and limiting conditions for transformational and charismatic leadership. The practical implications for organizations need to be identified more carefully. Transformational leadership seems widely relevant, but there may be situations where it is unnecessary or has negative consequences along with the positive ones. The relative importance of different transformational behaviors probably depends on the situation. The potential for using charismatic leadership to improve organizations seems limited, and it may be warranted only in special situations. Whether it is possible to have the potential benefits of charismatic leadership without any of the negative consequences is not yet evident.

Transformational and charismatic leadership are often treated as equivalent, but there are plausible differences that should not be ignored or discounted. At the present time, it seems best to conceptualize the two types of leadership as distinct

but partially overlapping processes. A related question is whether individual leaders can be classified into mutually exclusive categories on the basis of their use of transformational or charismatic leadership. Vague definitions of leader “types” have long been popular in the literature, but they are often simplistic stereotypes with limited utility for increasing our understanding of effective leadership. It is still too early to determine whether there is any justification for applying labels such as “transformational,” “transactional,” and “charismatic” to individual leaders.

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