

Using the Myers-Briggs® Instrument with Blanchard's Situational Leadership II® Assessment



Blanchard's *Situational Leadership II*® (SLII®) assessment is designed to teach leaders to diagnose the needs of an individual or a team and then use the appropriate leadership style to respond to the needs of the person and the situation. The model is based on the belief that if a leader can develop the talent to skillfully diagnose an employee's needs, then he or she can decide, based on the nature of the situation, what kind of guidance is needed to develop that employee. Once the employee's needs are diagnosed, the leader can then guide that individual through four development levels (to be discussed later) and mentor him or her to a level at which he or she is autonomous, creative, and flexible.

It makes practical and intuitive sense to incorporate MBTI® knowledge into this process to help the leader learn more about what to pay attention to while defining an employee's needs and potential development areas. We know that by understanding the four mental processes in Jung's theory we gain access to information about energy, data collection, decision making, and orientation. These four processes are critical in identifying what is needed to make Blanchard's model more useful and relevant. Combining MBTI and SLII learning increases employees' knowledge about themselves and others, leading to more sustainable, long-term movement toward productivity and growth. Therefore a higher return on investment is possible in terms of what employees are able to accomplish and implement.

TWO KEY SKILLS

In Blanchard's model, the two skills of diagnosis and flexibility are influenced and informed by a person's core behaviors, competencies, and style. These skills are discussed below.

Diagnosis

In the Blanchard model, the first skill of a situational leader is diagnosis. However, given that people's diagnostic abilities and criteria are widely divergent, how can we know whether our diagnoses are accurate? We can begin to answer this question by examining the diagnosis process through the lens of psychological type.

According to type theory, the Sensing and Intuition preferences help us take in information. During this process we identify the types of information we know and trust. People with a preference for Sensing trust information that is concrete, specific, exact, precise, and tangible. They believe in what they can see, hear, touch, taste, and smell. Any opportunity to use their five senses reinforces their belief that something exists and is real. People with a preference for Intuition want to see the big picture before they dive into the details. They trust their sixth sense, or hunch, about

something as if what it tells them is solid fact. They want to invent new ways to see things and enjoy using creativity and innovation when interpreting new data. Of course, we all use both Sensing and Intuition as we gather and interpret information, but we tend to rely on our preferred preference, much as we rely on our preferred hand to write.

As a leader is trying to diagnose the development level at which an employee is starting, certain questions come to mind:

- Does the person tend to communicate in a precise, exact way or using symbols and metaphors?
- Does the person tend to be more realistic and efficient or more innovative and imaginative?
- Is the person more results oriented or idea oriented?
- Does the person tend to trust experience more or theories and patterns?
- Is it typically more comfortable for the person to stay with known solutions or to try something new and different?

The self-awareness gained through the Myers-Briggs® assessment—specifically in regard to type bias—can be critical to the leader at this juncture. The leader needs to keep in mind that some answers to the questions above may be more appealing to him or her than others because they reflect *the way the leader naturally takes in information*. Studies show that supervisors tend to promote employees who share their characteristics and qualities. It has also been shown that people tend to hire on the basis of certain style similarities. We are compelled, then, to ask the question, Do leaders define high potentials based on their potential congruence with the leader or on what those individuals can potentially bring to the organization? In order to accurately represent the development level of their employees, leaders have to enlist both sides of the Sensing–Intuition preference dichotomy. Using the Zig-Zag model of decision making (shown on the following page) can help them ensure that they are asking themselves questions drawing from both the Sensing and Intuition preferences.

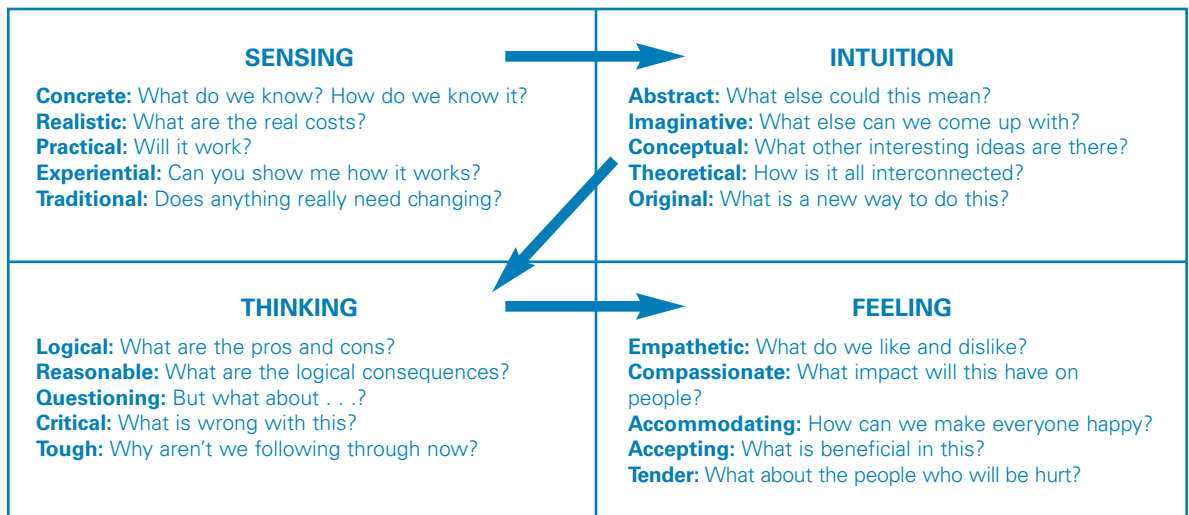
Though this model is geared toward a decision-making process, the questions presented can help ensure that leaders are using the full range of their Sensing and Intuitive knowledge to diagnose an employee’s development level. Once the initial diagnostic phase has been accomplished, the leader can begin to identify that person’s developmental needs.

Flexibility

According to the Blanchard model, to be an effective leader, one needs to

- Diagnose the situation
- Discuss the individual’s needs
- Coach in a way that is customized to that particular person, goal, time, and place

This process can be aided by the leader’s knowledge of the Thinking and Feeling preferences as well as the Judging and Perceiving preferences. Let’s start by examining the influence of Thinking and Feeling.



Source: Kummerow, J. M., & Quenk, N. L. (2004). *Working with MBTI® Step II Results*. Mountain View, CA: CPP, Inc. All rights reserved. Reprinted with permission.

The Thinking and Feeling preferences are used in making decisions. People with a preference for Thinking tend to make decisions based on logical analysis. People with a preference for Feeling tend to make decisions based on their values about honoring other people. Of course, everyone uses both Thinking and Feeling to some extent in determining what the best possible decision is, but each person tends to naturally rely more heavily on one or the other. Even though a person may have developed a practice of incorporating both Thinking and Feeling components into his or her decision making, he or she needs to be aware of what comes more naturally, and what others may need from him or her to feel more engaged and connected. For example, if a leader has a clear preference for Thinking and is coaching an employee who has a clear preference for Feeling, he or she may question the employee’s ability to behave logically in a crisis or assume the employee will have difficulty making tough decisions that affect people. If leaders can be aware of their perspective going into an evaluative situation, they can remind themselves of the importance of flexing their type to accommodate others’ styles.

The SLII’s four development levels can be interpreted according to people’s style and preferences:

- D1** Low competence, high commitment
- D2** Low to some competence, low commitment
- D3** Moderate to high competence, variable commitment
- D4** High competence, high commitment

The way we define competence and commitment is informed by our Thinking and Feeling preferences as well as some others. To appear competent, is it more important to have accurate information or to understand the people involved? To demonstrate commitment, is it more critical to provide a logical analysis of the steps necessary to achieve an end goal or to possess the ability to establish rapport with each team member to generate his or her buy-in? The chart below examines some of the differences in the ways people with a Thinking preference and people with a Feeling preference define competence and commitment.

Question	Thinking	Feeling
What are the necessary elements of competence?	Analyzing logically	Trusting one's coworkers
	Making a practical presentation or argument	Having faith in others' abilities
	Having expertise in one's area	Trusting one's own values
	Being willing to debate ideas	Being tactful in communications with others
	Performing a thorough examination of the facts	Promoting team harmony rather than conflict
	Being rational	Tolerating different viewpoints
	Thinking things through	Appreciating diverse opinions
	Making decisions based on successful experience	Knowing there is more than one right way to do something
	Having the qualifications to do the job right the first time	Having a means-oriented approach
	Being objective	Placing importance on the value of people
	Being able to answer difficult questions	Paying attention to how people will be affected
	Being able to identify where one's ideas come from	Investing time in focusing on points of agreement
	Being able to be firm in one's decisions and adhere to them	Knowing the importance of human capital in a project
What are the necessary elements of commitment?	Having the desire to follow a project through to the end	Being loyal to one's teammates
	Doing whatever it takes to get the job done	Being sensitive to what other people need to do their work
	Being exact about facts to avoid mistakes	Giving people the benefit of the doubt
	Being confident and clear about objectives	Using affection and praise to encourage others
	Staying the course	Understanding the mission of the job
	Knowing it is one's job to challenge others	Knowing it is your job to support others
	Keeping working relationships as rational as possible	Wanting people to feel good about the work they are doing
	Being able to compete to address challenges that arise	Resisting the urge to turn on others when things go bad
	Stating one's opinion freely and openly	Considering the feelings of others when communicating

After the employee's development level has been determined, it is important that the leader use and flex his or her preferences in coaching the employee through successive levels. The chart on the following page suggests which preferences the leader should enlist at each development level to provide a balanced experience for the employee.

Development Level	Use This Preference to Assist
D1 Needs	
Structure	Judging
Concrete examples	Sensing
Step-by-step learning plan	Sensing
Frequent feedback on progress	Thinking
D2 Needs	
Praise	Feeling
Reassurance	Feeling
Clarification of goals	Thinking
Advice and coaching	Thinking, Feeling
D3 Needs	
Sounding board to test ideas	Sensing, Intuition
Praise to build confidence	Feeling
Opportunities to lead	Intuition
Help removing obstacles	Sensing
D4 Needs	
Trust	Feeling, Thinking
Autonomy	Thinking
Variety/challenge	Perceiving
Opportunity to teach others	Thinking, Feeling

LEADERSHIP STYLES

Blanchard defines four situational leadership styles:

- s1 Directing** High directive and low supportive behavior
- s2 Coaching** High directive and high supportive behavior
- s3 Supporting** Low directive and high supportive behavior
- s4 Delegating** Low directive and low supportive behavior

In all four styles, the leader

- Makes sure goals and expectations are clear
- Observes and monitors performance
- Gives feedback

The leader's goal is style flexibility, or the ability to use the different leadership styles appropriately with different employees and in different situations. The SLII model advocates matching the appropriate leadership style to each employee's development level.

The key to being a successful leader, according to Blanchard, is having the flexibility to enlist different skill sets with people to fit their unique needs. The leader who manages all employees in exactly the same cookie-cutter manner will likely fail. The leader who tries to understand the unique needs of his or her employees will build loyalty and dedication to both himself or herself and the organization. A successful leader also is able to recognize when a person needs praise and when he or she could benefit from constructive criticism. Having an understanding of his or her preference for Thinking or Feeling enables the leader to use the awareness of his or her style to shift and flex behaviors to meet employees where they are.

The SLII tool is often used to enhance existing leadership skills or to help high-potential leaders increase their awareness about their styles. Because the cornerstone of emotionally intelligent leadership is self-awareness, the MBTI assessment is an effective tool for use with the SLII assessment as a first step in helping leaders identify their style. If you are working with people in the C-suite or at the top of the organization, you can use the MBTI® Step II™ (Form Q) assessment to facilitate a discussion about how they identify and differentiate between the types of leadership necessary for success in their field. If you begin by facilitating an MBTI workshop, you can give people a foundation of self-awareness on which to lay Blanchard's concepts of competency and commitment. Furthermore, if you are working with people at the EVP, VP, or management level, the Step II assessment provides an additional resource to define styles of leadership through the lens of type. Using the SLII and MBTI tools together offers a more holistic look at what leadership requires and at different perspectives and ways to understand the competencies involved. If you are working at a company that has many virtual employees at different levels of the organization, using the online version of the Myers-Briggs assessment, MBTI®Complete, may be the ideal solution. With MBTI®Complete, an online interactive learning session provides an interpretation of an individual's MBTI type.

Ultimately, the goal of combining these two instruments is to provide leaders with an awareness of self and others and a situationally effective model to help them develop their people and thereby help their organization achieve greater results.

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