Leaders as facilitators of individual and organizational learning

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Abstract

Purpose – The organizational learning and learning organization literatures lack empirical support in delineating the role leaders play in fostering or hindering learning. This study aims to build upon previous research on facilitative leadership in learning organizations to consider how leaders contribute to and detract from learning at the individual and organizational levels in the corporate context.

Design/methodology/approach – Preliminary survey research confirmed that the *Fortune* 500 company being considered for the study was perceived as a learning organization by its employees. The study then proceeded with critical incident interviews with managers and their direct reports, resulting in a cross-case content analysis of four categories: triggers, beliefs, behaviors, and outcomes, which prompted the development of a preliminary model of the learning process depicted by participants.

Findings – The findings revealed that learning leaders have several distinct characteristics and skills, but the participants gave the most emphasis to emotionally intelligent communication, a prominent feature of facilitative leadership.

Research implications/limitations – The study represents the perceptions of participants within a particular context at a specific time. Future research could include longitudinal, cross-cultural studies that focus on communication processes related to learning.

Practical implications – The study confirmed the importance of facilitative leadership while highlighting both cognitive and emotional aspects of learning. It also pinpointed mechanisms for institutionalizing learning.

Originality/value – The study offers empirical support for the centrality of facilitative leadership while pinpointing communication competence and emotional intelligence as essential aspects of effective learning leadership.

Keywords Learning organizations, Leadership, Emotional intelligence

Paper type Research paper

Introduction

As organizations face a fluctuating environment and unanticipated changes brought about by the information age (Bell, 1973; Drew and Smith, 1995), what practices offer hope for sustained renewal? Described as enhanced capacity for action through shared understanding (Daft and Weick, 1984), organizational learning is a primary source of competitive advantage (Appelbaum and Gallagher, 2000; De Geus, 1988; Garratt, 1999; Lei *et al.*, 1999; Pedler *et al.*, 1989; Slater and Narver, 1995; Stata, 1989; Thomas and Allen, 2006). What organizational form best facilitates the development of distinctive core competencies that lead to competitive advantage (Leonard-Barton, 1992; Prahalad and Hamel, 1990)? Whereas bureaucracies focus on doing things right and performance-based organizations emphasize doing the right things, learning

organizations create the capacity to do both better (Daft and Huber, 1987; Hitt, 1995; Senge, 1990).

The purpose of this mixed methods case study was to explore how leaders facilitate organizational learning in the context of a learning organization. In the preliminary phase, survey research indicated that the proposed research site was a learning organization. In the second, primary phase, qualitative interviews with managers and their direct reports became the basis for a conceptual model that depicts how leaders foster and hinder individual and organizational learning.

Review of literature
Organizational learning refers to learning processes and activities that occur within the organization whereas learning organization refers to a particular organizational form (Lundberg, 1995; Ortenblad, 2001; Sun and Scott, 2003; Tsang, 1997; Yeo, 2005). According to Ortenblad, three major differences exist between the literatures:

(1) content;

(2) degree of normativity; and

(3) target audience.

First, organizational learning is an activity while the learning organization is a type. Second, the organizational learning literature is primarily descriptive whereas the learning organization literature is primarily prescriptive (Easterby-Smith and Araujo, 1999). Third, organizational learning is academic in nature while the learning organization literature targets practitioners and consultants. Despite these differences, the literatures share three areas of consensus: the centrality of environmental alignment; the necessity of individual learning and its transfer to the organizational level; and the priority of maximizing the impact of contextual factors such as strategy, structure, and culture (Fiol and Lyles, 1985). In short, the learning organization proactively pursues congruency between contextual factors and the environment to facilitate the organizational learning process.

In the literature leadership is proposed as a pivotal factor in the quest to become a learning organization because leaders challenge status quo assumptions regarding the environment and guide followers in creating shared interpretations that become the basis for effective action (Altman and Iles, 1998; Appelbaum and Goransson, 1997; Argyris, 1973, 1977, 1993; Bartunek, 1984; Bennis and Nanus, 1985; Fiol, 1994; French and Bazalgette, 1996; Garvin, 1993; McGill and Slocum, 1993; McGill *et al.*, 1992; Naot *et al.*, 2004; Nonaka, 1988, 1991 1994; Nystrom and Starbuck, 1984; Smircich and Stubbart, 1985; Vera and Crossan, 2004; Williams, 2001). Additionally, leaders face a three-fold responsibility: making organizational learning a high priority, creating the psychological and cultural conditions to enhance collective learning, and shaping contextual factors to create transfer of learning from the individual to the organizational level (Popper and Lipshitz, 2000). In light of increased competitive pressure, managers at all levels of the organization are told to take on new roles based on interpersonal influence; communication networks; and the skills of negotiation, collaboration, and empathy (Kanter, 1989). Specifically, researchers suggest facilitative leadership because a complex environment calls for a form of leadership that stimulates transformation (Slater and Narver, 1995). In contrast to a "command and control" mindset, facilitative leaders motivate through empowerment and develop

those around them by serving as coaches and mentors (Ellinger and Bostrom, 1999; Goh, 1998; Hitt, 1995; Mills and Friesen, 1992).

The distinction between facilitative leadership and other contemporary views of leadership is a subtle but important one. Specifically, what differentiates one leadership theory from another is each one's depiction of what defines the core of effective leadership. For example, Collins (2001) described the highest level of leadership effectiveness as a "paradoxical blend of personal humility and professional will" (p. 20) while Greenleaf (1998) depicted the servant-leader as one whose highest value is ensuring that others' needs are met. Thus, although both of these perspectives may employ coaching and/or mentoring, neither would describe coaching and mentoring as the most necessary components of leadership effectiveness in the context of fostering individual and organizational learning.

Unfortunately, the literature on the leader's role in the learning organization is good at making recommendations but slower to provide a solid research foundation upon which to base them. Some of the deficiencies in the learning leadership literature stem from problems that afflict the organizational learning and learning organization literatures generally. Despite widespread interest (Crossan and Guatto, 1996), the literature suffers from a number of shortcomings. First, the literature is fragmented between academics and practitioners (Lipshitz and Popper, 2000; Lundberg, 1995; Shrivastava, 1983). Second, because diverse academic disciplines study organizational learning (Easterby-Smith, 1997; Friedman *et al.*, 2005), distinct ontology's and implicit assumptions foster varying and inconsistent usage of terminology (Crossan *et al.*, 1995). Last and most serious is the limited empirical research on organizational learning and the learning organization (Easterby-Smith and Araujo, 1999; Lipshitz and Popper, 2000; Miner and Mezias, 1996; Tsang, 1997). For instance, in a review of 123 articles involving organizational learning that were published between 1990 and 2002, Bapuji and Crossan (2004) concluded the empirical research had grown "substantially" since the mid-1990s. However, only 55 of the 123 articles were empirical in nature, still far outnumbered by theoretical and review papers. Thus, the majority of published articles are still conceptual in nature despite recent growth in empirical studies.

Although the empirical literature investigates leader beliefs and behaviors to a degree, the conceptual literature's stress on facilitative leadership is noticeably missing. Thus, hypothesized facilitative leadership behaviors are addressed in the context of discussing the present study's results and appear in Table I. The exception is recent work by Ellinger and her colleagues, which combined the emphasis on facilitative leadership in the conceptual literature with the empirical investigation of leadership beliefs and behaviors (Ellinger, 1997; Ellinger and Bostrom, 1999, 2002; Ellinger *et al.*, 1999). Using critical incident interviews, Ellinger confirmed that facilitative leaders possessed unique beliefs about themselves as facilitators of learning, about employees as learners, and about the learning process (Ellinger and Bostrom, 2002). Furthermore, leaders displayed two distinct clusters of behaviors labeled as empowering and facilitating (Ellinger and Bostrom, 1999). In short, Ellinger's empirical work significantly advanced facilitative leadership beyond mere conjecture.

Ellinger (1997) study established an empirical foundation for learning leadership by focusing on leaders as facilitators of learning. The present study builds upon this foundation in three areas. First, interviews soliciting leaders' self-perceptions were

Conceptual literature	Corresponding TeleCorp study behaviors
1. Building climate/culture conducive to learning (e.g., collaborative, trusting, psychologically safe)	Asking, consulting, emoting, perceiving (antithesis – authoritarian and defensive behaviors)
2. Building shared interpretations of external environment	Clarifying, teaching
3. Fostering active scanning and experimentation	Experimenting
4. Helping others face reality, including performance gaps	Clarifying, teaching, upholding
5. Applying learning tools to create and capture learning	Best practices, processes and procedures, systems and technology
6. Facilitating open communication and frequent interaction, including critical reflection and dialogue	Advising, customizing, emoting, perceiving (Antithesis – non-responsive behaviors)
7. Institutionalizing learning (transfer of learning from individual to organizational level)	Best practices, subject matter experts, processes and procedures, systems and technology, upper management involvement
8. Shifting from "command and control" mindset to facilitative leadership	Asking, consulting, empowering

Table I.
Behaviors – conceptual
literature versus
TeleCorp study

checked against followers' perceptions. Second, the present study placed greater emphasis on leader beliefs and behaviors that impede learning. Last, it gave greater attention to how leaders foster or hinder the transfer of learning to the organizational level. In other words, are facilitative leadership beliefs and behaviors sufficient to account for organizational learning as well, or are other aspects of leadership necessary? The overarching question that guided this research was how leaders facilitate individual and organizational learning. To pursue this line of inquiry, two research questions were posed. First, how do leaders foster and hinder individual follower learning? And, second, how do leaders foster and hinder organizational learning?

Research design and methodology

The research design proceeded as a two-phase, sequential mixed methods case study using the Dimensions of the Learning Organization Questionnaire (DLOQ©) (Watkins and Marsick, 1997) and structured interviews employing the Critical Incident Technique (Flanagan, 1954). The first phase of the research relied upon the DLOQ to determine whether "TeleCorp," a *Fortune* 500 telecommunications company and the proposed research site, qualified as a learning organization and thus as a source of rich information regarding organizational learning. One of TeleCorp's stated goals at the time of data collection was to become a learning organization; thus, the DLOQ was used preliminarily to confirm the extent to which TeleCorp employees perceived the company to be a learning organization. In short, the survey results established an average benchmark by which to conclude that TeleCorp could minimally be considered a learning organization.

The second, primary phase of the research applied a qualitative case study methodology to data collection and analysis. The qualitative tradition was well suited to the study's specific research questions due to its advantage in studying "how things work in particular contexts" (Mason, 2002, p. 1) and when focusing on processes and

meanings participants attribute to daily social interactions (Marshall and Rossman, 1999). The particular approach taken in the present study is case study research. Eisenhardt (1989) defined a case study as "a research strategy which focuses on understanding the dynamics present within single settings" (p. 534). According to Yin (2003), case studies are most appropriate for answering how or why research questions in a contemporary setting.

Qualitative and quantitative research represents two contrasting sampling logics (Mason, 2002). Instead of statistical sampling to maximize generalizability, qualitative research employs theoretical sampling, wherein participant selection is based on potential relevance to the study's research questions. According to Patton's (2002) typology of purposeful sampling strategies, the present study employed stratified intensity sampling. Specifically, it involved a sample of 23 participants, including six leader interviews and three corroborating direct report interviews for each leader. (One of the leaders had only two direct reports at the time of data collection.) The sample was stratified in that it included one leader from each level in the organization's managerial hierarchy. Intensity sampling was used to select cases through internal expert nomination those managers who manifested general leadership competence. Direct report participants were then chosen randomly from among each leader's direct reports. Ultimately, the sample size in a qualitative study must support the study's purpose and generate sufficient data to address the research questions posed (Mason, 2002; Patton, 2002).

The present study employed qualitative interviewing in general and the Critical Incident Technique (CIT) in particular. A critical incident, as defined by Flanagan (1954), is "extreme behavior, either outstandingly effective or ineffective with respect to attaining the general aims of the activity" (p. 338). Thus, a critical incident in the current study was one wherein the manager was either effective or ineffective at facilitating learning. Standardized, open-ended interview guides were customized for either managers or their direct reports. Participants were labeled L1 through L6, and direct reports were associated with their leader and labeled A, B, and C (e.g., L1's direct reports were classified as L1A, L1B, and L1C). The critical incident approach informed the structure and content of the interview guides by focusing participant attention on specific examples of managers in effective and ineffective learning situations. Each interview solicited four incidents involving learning leadership: individual-effective, individual-ineffective, organizational-effective, and organizational-ineffective. Interviews were audio recorded and transcribed verbatim, ranging from 30 to 90 minutes and averaging 60 minutes in length.

According to Patton (2002), content analysis refers "to any qualitative data reduction and sense-making effort that takes a volume of qualitative material and attempts to identify core consistencies and meanings" (p. 453). These core meanings are called patterns or themes. An advantage of content analysis stated by Weber (1990) is its direct focus on the products of human communication (i.e. the interview transcripts themselves). The study relied on content analysis to classify text into categories and produce themes.

Cross-case content analysis proceeded using the qualitative software program NVivo to code 2,766 data strips into 24 clusters and 112 themes. Following Ellinger (1997) the study's unit of analysis was the sentence level, and no sentence was coded for more than one theme. Preliminary codes suggested by Ellinger's research were used to structure the interview guides and subsequently to classify data into the general

categories of triggers, beliefs, behaviors, and outcomes. After all transcripts had been
classified according to these general categories, a second phase of cross-case analysis
resulted in the creation of subcategories within each major category.

Findings and discussion

The themes resulting from the cross-case content analysis comprise the primary focus
of the findings. Each thematic category examined below includes a table summarizing
the clusters, themes, and frequency counts associated with that category. Due to space
considerations, only the most prominent themes are elaborated upon to illustrate each
category. Discussion of the findings related to each thematic category compares the
present study to existing research and pinpoints how the study's results support,
extend, or challenge current research.

Triggers

Triggers refer to the contexts in which learning episodes occur and encompass causes
and conditions. Interview participants supplied the context of each critical incident and
what prompted them to engage in the learning opportunity. Four clusters representing
22 subcategories emerged as listed in Table II. A total of 63 of 280 (23 percent) data
strips highlighted business-related learning needs. This category revealed a more
intense competitive environment that drives the need to maintain focus on financial
performance and customer satisfaction.

Constituting nearly a third of the learning triggers identified by respondents with 90
of 280 (32 percent) total data strips, corporate initiatives and changes encompassed
systemic, organization-level learning triggers that affected groups rather than
individual employees. Seven subcategories emerged; the theme formal learning
programs is elaborated upon to illustrate this category. A total of 28 of 90 (31 percent)
data strips described formal learning programs. Although the majority of respondents
discussed face-to-face training situations, they also mentioned computer-based
training as an impetus for learning.

With 87 of 280 data strips coded as learning and development opportunities, these
eight subcategories comprised nearly one-third (31 percent) of the learning triggers
identified by respondents. Only the top subcategory is highlighted here. A total of 31 of
87 (36 percent) data strips related to individual learning needs/opportunities. This
category represents informal coaching discussions between leaders and their followers.
Finally, 40 of 280 (14 percent) data strips coded as learning triggers related to
performance gaps and problems. Whereas the learning and development opportunities
identified above represent proactive coaching and collaboration situations, this
category signifies performance deficiencies that necessitated learning in the forms of
correction and remediation.

A clear connection exists between the themes captured in the business-related
learning needs cluster and the learning literature. Nearly one-fourth of the triggers
identified by study participants conveyed the need to maintain focus on financial
performance and customer satisfaction in light of a more intense competitive
environment. Likewise, the existing literature portrays the business environment as
turbulent and ambiguous (March and Olsen, 1975; Weick, 1979), characterized by
unanticipated, discontinuous, rapid change (Baldwin, 1997; Dixon, 1992; Drew and
Smith, 1995; Klimecki and Lassleben, 1998).

Table II.
Triggers – clusters,
themes, and frequencies

	$N = 280$	% 100
Business-related learning needs	*63*	*22.50*
Adjusting to changes in the business climate	14	22.22
Focusing on top business priorities	26	41.27
Meeting routine business objectives	15	23.81
Responding to potential losses of business	8	12.70
Corporate initiatives and changes	*90*	*32.14*
Company-wide efforts to standardize operations	11	12.22
Expectations of upper management	14	15.56
Formal learning programs	28	31.11
Organizational culture changes	4	4.44
Policy/procedure changes	10	11.11
Reorganizations/reductions in staff	12	13.33
Scheduled meetings and conference calls	11	12.22
Learning and development opportunities	*87*	*31.07*
Collaborating among work groups	4	4.60
Gaining input from followers	8	9.20
Gaining input from leaders	14	16.09
Gathering and distributing best practices	7	8.05
Individual learning needs/opportunities	31	35.63
Promoting to new positions	5	5.75
Responding to technology questions	8	9.20
Team learning needs/opportunities	10	11.49
Performance gaps and problems	*40*	*14.29*
Individual performance gaps/problems	23	57.50
Team performance gaps/problems	9	22.50
Violating policy/procedure	8	20.00

Because this study extends the work of Ellinger and her colleagues (Ellinger, 1997; Ellinger and Bostrom, 1999, 2002; Ellinger *et al.*, 1999), the four primary sections of the discussion (i.e. triggers, beliefs, behaviors, and outcomes) explicitly compare the results of her research with those in the present study. Both studies highlighted learning episodes triggered by leader's proactive coaching and development efforts. Further, both identified situations in which performance deficiencies necessitated learning. TeleCorp participants, however, introduced a category not mentioned by participants in Ellinger's research: corporate initiatives and changes, referring to systemic, organization-level learning triggers that affected groups rather than individual employees. Since one of the stated purposes of the present study was to more explicitly focus on organizational learning (versus individual learning in an organizational context), this category represents an important extension of existing research.

Beliefs
Due to time constraints in the interview process, beliefs were the only major category not investigated through specific interview questions and thus emerged inductively, generating 11 themes in four clusters as shown in Table III. Nearly 40 percent of the

	$N = 301$	$\%$ 100
About leadership in general	*76*	*25.25*
Beliefs about leadership roles and responsibilities	30	39.47
Conclusions about how leaders relate to followers	27	35.53
Generalizations about effective leadership	19	25.00
About my leader specifically	*133*	*44.19*
Attributes that contribute to leader effectiveness	74	55.64
Attributes that detract from leader effectiveness	31	23.31
Conclusions about how leaders relate to learning	28	21.05
About followers	*44*	*14.62*
Attributes/abilities related to followers	29	65.91
Conclusions about how followers relate to leaders	15	34.09
About learning	*48*	*15.95*
Beliefs about types of learning	14	29.17
Conclusions about the role of communication in learning	15	31.25
Opinions about responsibility for learning	19	39.58

Table III.
Beliefs – clusters,
themes, and frequencies

data strips about leadership in general consisted of beliefs about leadership roles and responsibilities. Of the 30 data strips, 14 dealt explicitly with the leader's role as coach and mentor. Additional beliefs involving coaching-related responsibilities addressed asking questions, assigning challenging projects, sharing best practices and job-related information, and making opportunities known.

Over 44 percent of the data strips revealed beliefs about my leader specifically. Offered primarily by direct reports, 133 of 301 statements produced three subcategories. Attributes that contribute to leader effectiveness constituted more than 55 percent of the statements about specific leaders, revealing a diverse array of characteristics. The most frequently mentioned attributes portrayed leaders as approachable, personable, accessible, laid back, and informal. Conversely, attributes that detract from leader effectiveness produced 31 of 133 (23 percent) statements. The majority of responses reflected dissatisfaction with the nature of the leader-follower relationship. Complaints included leaders not communicating enough, not explaining the reasons behind decisions, not clarifying expectations or providing adequate direction, not supplying job-related information, and not proactively seeking to help followers.

Of 301 (15 percent) statements, 44 related to beliefs about followers while 48 of 301 (16 percent) statements suggested beliefs about learning. Of 48 (29 percent) statements about learning, 14 encompassed beliefs about types of learning. Both formal and informal learning are important, and participants stressed a preference for face-to-face over computer-based training. Of 48 (31 percent) statements about learning, 15 explored conclusions about the role of communication in learning. In general, participants underscored the importance of maintaining open lines of communication between leaders and their followers. Specific channels preferred by respondents included meetings and one-on-one coaching, whereas email was viewed as an inevitable yet less effective means of communicating. Finally, 19 of 48 (40 percent) statements about learning discussed opinions about responsibility for learning.

Ellinger (1997) refined her dissertation research on beliefs in a subsequent article (Ellinger and Bostrom, 2002); therefore, the classification system reflected in the latter is used in comparison with TeleCorp findings. Both the present study and Ellinger and Bostrom reported beliefs about leaders, followers, and the learning process. Concerning leaders, both studies presented beliefs about leaders' roles and responsibilities. Specifically, Ellinger and Bostrom found participants distinguished between the roles of managing and coaching. They associated managing with telling, judging, controlling, and directing while they viewed coaching as empowering, helping, developing, supporting, and removing obstacles. The present study also revealed beliefs about leadership roles, with a heavy emphasis on coaching and mentoring. Beyond leadership roles and responsibilities, TeleCorp participants offered opinions about what constitutes effective leadership and how leaders should relate to followers. Participants asserted effective leadership requires frequent, informal interactions between leaders and followers. Ineffectiveness stemmed from dissatisfaction with a leader-follower relationship characterized by infrequent interaction and lack of communication. Overall, Ellinger and Bostrom offered a more nuance explanation of managing versus coaching as distinct leadership roles. The present study contributes a broader understanding of effective versus ineffective leadership attributes and emphasizes that many of the traits associated with effective leadership overall are similar to those associated with the coaching role in particular.

Behaviors
As the largest category in the study, behaviors encompassed the actions of those involved in learning episodes as well as the skills and background that affected learning situations. For each critical incident, participants were asked to relate precisely what happened and what each person involved said and experienced. Data analysis originally generated eight clusters consisting of 34 subcategories; a refined list of five clusters are discussed in this article and shown in Table IV.

Facilitating refers to making a process less difficult for others while supporting their progress. With 351 of 1,060 data strips, facilitating constituted one-third (33 percent) of all behaviors coded and suggested five subcategories. With 150 of 351 data strips, more than 42 percent of facilitating behaviors involved teaching through overt instruction and sharing information. Based on participant responses, freely sharing information formed the basis for effective teaching, along with the use of examples and past experiences.

Instances wherein leaders assisted followers in problem solving and decision making generated 220 of 1060 (21 percent) data strips. Four subcategories emerged that are primarily cognitive in nature. First, in 65 of 220 (30 percent) statements, leaders were advising (followers) through suggestions and constructive confrontation. Five of six leaders and direct reports of all six leaders elaborated on the advising role of leadership. Further, 41 of 220 (19 percent) statements embodied opportunities leaders took to enable followers by empowering [them] to make autonomous decisions. Respondents involving every leader except L5 described a leadership approach wherein leaders allowed followers freedom to make critical business decisions with minimal leader intervention. Thus, leaders focused on defining desired end-states and inspecting results.

	$N = 1,060$	% 100
Facilitating	*351*	*33.11*
Asking questions of followers	26	7.41
Clarifying to establish mutual understanding	85	24.22
Delegating learning projects to followers	21	5.99
Teaching through overt instruction and sharing information	150	42.74
Upholding existing standards and maintaining accountability	69	19.66
Problem solving and decision making	*220*	*20.75*
Advising through suggestions and constructive confrontation	65	29.55
Consulting relevant stakeholders before making decisions	69	31.36
Empowering followers to make autonomous decisions	41	18.64
Experimenting through brainstorming and exploring alternatives	45	20.45
Communicating and relating	*205*	*19.34*
Customizing learning episodes to address individual needs	44	21.46
Emoting to connect with followers	57	27.80
Motivating by sharing recognition and providing incentives	73	35.61
Perceiving followers' needs by reading them accurately	31	15.12
Developing	*192*	*18.11*
Advancing systems and technology	31	16.15
Balancing individual and organizational concerns	16	8.33
Cultivating subject matter experts	18	9.38
Documenting best practices	42	21.88
Documenting processes and procedures	16	8.33
Involving upper management	69	35.94
Ineffective behaviors	*92*	*8.68*
Failing to respond to followers thereby neglecting learning	76	82.61
Relating to followers in an authoritarian manner	7	7.61
Responding to followers in a defensive manner	9	9.78

Table IV.
Behaviors – clusters,
themes, and frequencies

Whereas problem solving and decision making behaviors engaged followers' minds, communicating and relating appealed to followers' emotions. Four subcategories, primarily affective in nature, consisted of 205 of 1,060 (19 percent) data strips. A total of 57 of 205 (28 percent) statements concerned emoting to connect with followers. Adjectives used to describe this "intangible leadership quality" included passionate, positive, uplifting, sensitive, supportive, sincere, genuine, loyal, compassionate, and empathetic. Similarly, 31 of 205 (15 percent) data strips emphasized various leaders' abilities in perceiving followers' needs by reading them accurately. Participants described this elusive quality as the "ability to really know people," the "ability to relate to people," "a way of reading people," "good people skills," "good human relations skills", and "communication skills."

Statements categorized as developing behaviors highlighted opportunities to foster the organizational level of learning. Six subcategories generated 192 of 1,060 (18 percent) data strips. For example, 16 of 192 (8 percent) statements reflected documenting processes and procedures. In like fashion, 31 of 192 (16 percent)

statements represented advancing systems and technology. Finally, with 69 of 192 statements, over one-third (36 percent) of developing behaviors explored situations involving upper management. Followers conveyed how L1, L2, and L3 each successfully escalated issues to the appropriate parties to resolve them.

Whereas the behavior categories examined to this point primarily focus on effective leadership actions, 92 of 1,060 (9 percent) data strips suggested three subcategories of ineffective behaviors that hindered learning. Classified as non-responsive behaviors with 76 of 92 data strips, over 82 percent of the statements revealed ineffective behaviors concerning lack of leadership action and neglect of potential learning opportunities. In short, followers experienced their greatest frustrations when leaders failed to act.

Table I presents a summary of eight leader learning behaviors proposed in the conceptual literature and identifies the themes from the present study that illustrate these behaviors in action. According to the literature, learning leaders build an organizational climate/culture conducive to learning (Goh, 1998; McGill and Slocum, 1993). Learning cultures are characterized as open, collaborative, trusting, and psychologically safe (Barker and Camarata, 1998; Edmondson, 1996, 1999a,b; Leithwood *et al.*, 1998; Nevis *et al.*, 1995; Schein, 1993a; Snell, 2001). Four themes in the present study embody these cultural attributes. Asking and consulting create openness and collaboration through interaction between various stakeholders prior to decision making while emoting and perceiving foster the mutual understanding and respect required to create a learning climate. In contrast, authoritarian and defensive behaviors stand as roadblocks to building a learning culture. Learning leaders also build shared interpretations, particularly of the external environment, upon which collective action may be taken (Daft and Weick, 1984; Esperat and Godkin, 1994; Smircich and Stubbart, 1985; Weick, 1979). Both clarifying and teaching accomplish this purpose. Clarifying focuses follower attention on core responsibilities, and teaching confronts followers about harsh business realities.

Concerning leaders and corporate strategy, the conceptual literature stresses the importance of active scanning and experimentation (Appelbaum and Reichart, 1998; De Geus, 1997; Garvin, 1993; Goh and Richards, 1997; Hitt, 1995; McGill and Slocum, 1993; Nevis *et al.*, 1995; Slocum *et al.*, 1994). In the current study, experimenting emerged as an important theme as leaders engaged followers in brainstorming and exploring alternatives. Leaders also help others face reality, using environmental factors as the impetus for addressing performance gaps (Appelbaum and Goransson, 1997; Johnson, 2002). Three themes relate to this concern. Clarifying establishes mutual understanding while teaching provides overt instruction regarding environmental conditions. Upholding then reinforces standards and fosters accountability.

The conceptual literature focuses attention on a variety of learning tools available to leaders (Fulmer *et al.*, 1998). Specifically, leaders may implement search tools such as scenario forecasting (Brenneman *et al.*, 1998), as well as evaluation tools like the post-project or after-action review (Baird *et al.*, 1999; Busby, 1999; Gulliver, 1987). When TeleCorp participants were asked about learning practices, habits, and tools, they focused on the communication channels through which learning occurred. Further, they considered establishing best practices, processes and procedures, and systems and technology to be learning tools. In contrast to the sophisticated learning

tools described in the conceptual literature, TeleCorp respondents revealed a rather straightforward list of communication and documentation channels.

As the conceptual literature points out, leaders surface assumptions underlying experience through individual and collective critical reflection (Daudelin, 1996; Keating *et al.*, 1996; Marsick, 1988; Schein, 1993b) and then guide others in dialogue, the process of creating shared meaning through collective inquiry (Isaacs, 1993). Reflection and dialogue relate to four themes in the present study. First, advising encompasses constructive confrontation and the ability to make subtle suggestions to raise alternative perspectives. Second, customizing frames issues differently based on the needs of communication receivers. Last, emoting and perceiving facilitate accurately reading others and addressing their communication needs. Conversely, non-responsive behaviors reveal lack of leadership action and neglect of communication.

According to Altman and Iles (1998), leaders are responsible for the transfer of learning from the individual to the organizational level. They institutionalize learning by capturing individual knowledge in the organization's culture and memory systems (Argyris and Schon, 1978, 1996; Crossan *et al.*, 1995). Olivera (2000) found both computer-based technologies (such as databases and bulletin boards) and social networks to be critical sources of organizational memory. Likewise, the present study included networks of subject matter experts along with the documentation of best practices, processes and procedures, and systems and technology. Further, TeleCorp participants identified upper management involvement as a means to institutionalize learning.

Finally, a strong emphasis in the conceptual literature is the shift leaders should make from a command and control mindset to a facilitative approach (De Geus, 1997; McGill *et al.*, 1992; Smith and Taylor, 2000; Ulrich *et al.*, 1993). As stimulators and catalysts for learning (Hitt, 1995; Prokesch, 1997), leaders must become skilled in negotiation, collaboration, and empathy (Kanter, 1989). Facilitative leaders abandon the role of expert to embrace the role of coach (Slater and Narver, 1995). They focus on developing those around them by understanding relationship dynamics and exhibiting excellent communication skills. They empower others to act on their learning (Goh and Richards, 1997). Three themes in the present study emphasize these aspects of facilitative leadership. Asking and consulting seek follower input while empowering enables followers to formulate solutions with ongoing leader support. In sum, TeleCorp participants highlighted a wide spectrum of learning behaviors identified in the conceptual literature.

Like other aspects of the discussion, this segment includes a comparison of Ellinger (1997) findings with those in the present study. Similar to her treatment of beliefs, Ellinger refined her classification system of behaviors in a later publication (Ellinger and Bostrom, 1999). The article offered two behavior clusters, empowering and facilitating, that are echoed strongly in the present study. Additionally, TeleCorp participants produced several themes not mentioned by Ellinger and Bostrom that represent three unique contributions of the present study. First, the communicating and relating cluster introduces an affective component to learning leadership by highlighting the importance of reading followers accurately by perceiving, tailoring learning to individual needs through customizing, connecting with followers by emoting, and sharing recognition to stimulate stronger performance through motivating. Second, although Ellinger and Bostrom discussed the need to create and

promote a learning environment, the present study's developing cluster moves beyond an awareness of traditional communication channels to suggest ways of institutionalizing learning. Last, this study extends Ellinger and Bostrom's typology by identifying three ineffective behaviors associated with learning episodes: authoritarianism, defensiveness, and nonresponsiveness. In short, this study expands the current understanding of learning behaviors by delineating both effective and ineffective leader behaviors.

Outcomes
Outcomes concern the perceived results or effects of learning episodes reported by participants. For each critical incident, respondents shared the results, how they knew whether learning had taken place, and the benefits or costs. With 25 subcategories, outcomes emerged for leaders, followers, and the organization, as shown in Table V. A total of 48 of 394 (12 percent) total data strips related to outcomes for the leader. Fourteen of 48 (29 percent) statements concerning leader outcomes involved a sense of increased leader satisfaction when follower learning occurred. With 15 of 48 (31 percent) statements, increased leader frustration when learning failed constituted the

	$N = 394$	% 100
For the leader	*48*	*12.18*
Increased leader satisfaction	14	29.17
Increased leader frustration	15	31.25
Enhanced leader-follower interaction	9	18.75
Diminished leader-follower interaction	4	8.33
Enhanced leader credibility and recognition	6	12.50
For the follower	*162*	*41.12*
Increased follower satisfaction	22	13.58
Increased follower frustration	28	17.28
Enhanced follower knowledge and understanding	27	16.67
Enhanced follower performance and effectiveness	29	17.90
Blocked/missed follower learning opportunity	14	8.64
Enhanced follower expectations	13	8.02
Diminished follower expectations	6	3.70
Increased follower autonomy	7	4.32
Solved follower problems	6	3.70
Disciplined/demoted/terminated follower	6	3.70
Retained key personnel	4	2.47
For the organization	*184*	*46.70*
Enhanced organizational performance	52	28.26
Diminished organizational performance	20	10.87
Enhanced team motivation	24	13.04
Diminished team motivation	10	5.43
Enhanced interpersonal and group dynamics	27	14.67
Diminished interpersonal and group dynamics	12	6.52
Identified organizational learning failures	4	2.17
Revealed resistance to or neglect of learning	17	9.24
Shared/documented best practices	18	9.78

Table V.
Outcomes – clusters, themes, and frequencies

majority of data strips in the category of leader outcomes. In contrast to the satisfaction they felt when they helped followers become more effective, leaders experienced frustration when their efforts did not produce desired behavior changes.

Learning outcomes for the follower comprised 41 percent of the data strips with 162 of 394 statements in eleven subcategories. Twenty-two of 162 (14 percent) statements involved increased follower satisfaction following a learning episode whereas 28 of 162 (17 percent) statements indicated increased follower frustration following a learning episode. The biggest frustration mentioned by seven respondents occurred when followers failed to receive clear direction and answers to their questions. Twenty-seven of 162 (17 percent) statements represented enhanced follower knowledge and understanding. Further, 29 of 162 (18 percent) statements reflected enhanced follower performance and effectiveness. This theme goes beyond cognitive change to signify overt modifications in behavior. Conversely, 14 of 162 (9 percent) data strips corresponded to a blocked/missed follower learning opportunity wherein no changes in behavior occurred.

Outcomes for the organization constituted the largest proportion of the data strips with 184 of 394 (47 percent) statements in nine subcategories. Although respondents failed to identify situations wherein the entire company was affected by a learning episode, many scenarios impacted interpersonal and work group dynamics. Enhanced organizational performance represented nearly one-third (28 percent) of the organizational outcomes with 52 of 184 data strips. Performance encompassed both improvements in effectiveness and productivity. Further, 24 of 184 (13 percent) statements indicated enhanced team motivation following successful learning episodes.

Although Ellinger *et al.* (2002) found a positive relationship between learning organizations and perceived financial performance, Baldwin and Danielson (2002) cautioned the use of overall financial performance as a direct criterion of learning success (versus consideration of learning's impact on intervening variables). As seen in Table VI, while TeleCorp participants highlighted 14 positive outcomes associated with learning episodes, they failed to pinpoint improved financial performance specifically. Moreover, respondents also named 11 negative outcomes, supporting the

Positive outcomes	Negative outcomes
Enhanced follower expectations	Blocked/missed follower learning opportunity
Enhanced follower knowledge and understanding	Diminished follower expectations
Enhanced follower performance and effectiveness	Diminished leader-follower interaction
Enhanced interpersonal and group dynamics	Diminished interpersonal and group dynamics
Enhanced leader credibility and recognition	Diminished organizational performance
Enhanced leader-follower interaction	Diminished team motivation
Enhanced organizational performance	Disciplined/demoted/terminated follower
Enhanced team motivation	Identified organizational learning failures
Increased follower autonomy	Increased follower frustration
Increased follower satisfaction	Increased leader frustration
Increased leader satisfaction	Revealed resistance to or neglect of learning
Retained key personnel	
Shared/documented best practices	
Solved follower problems	

Table VI.
Outcomes – TeleCorp
study positive versus
negative outcomes

asserition by Crossan *et al.* (1995) that learning may have both positive and negative effects.

While Ellinger's (1997) research generated a variety of outcomes for leaders, followers, and the organization, the present study makes two distinct contributions. First, because Ellinger did not interview direct reports, she asked participating leaders to speculate on the outcomes for their followers. In contrast, the present study includes follower outcomes offered directly by followers themselves. A second contribution of the current research is its evenhanded treatment of both positive and negative learning outcomes, stemming from the interview guide's equal emphasis on effective and ineffective incidents.

Implications

This article offers a process model containing the elements identified by TeleCorp participants (see Figure 1). The model presents a necessarily oversimplified learning process in portraying triggers, behaviors, and outcomes in a linear fashion. TeleCorp participants identified a broad range of learning triggers that emphasize both proactive and reactive interactions with followers, as well as external and systemic impetuses for learning. The model depicts beliefs about leaders, followers, and learning as a collective filter that affects participants' actions in response to learning triggers as well as outcomes in response to learning behaviors. For instance, general beliefs expressed about effective and ineffective leadership affect how leaders respond to learning triggers and how followers interpret leaders' actions. The behaviors section of the model presents effective and ineffective leader behaviors related to individual and
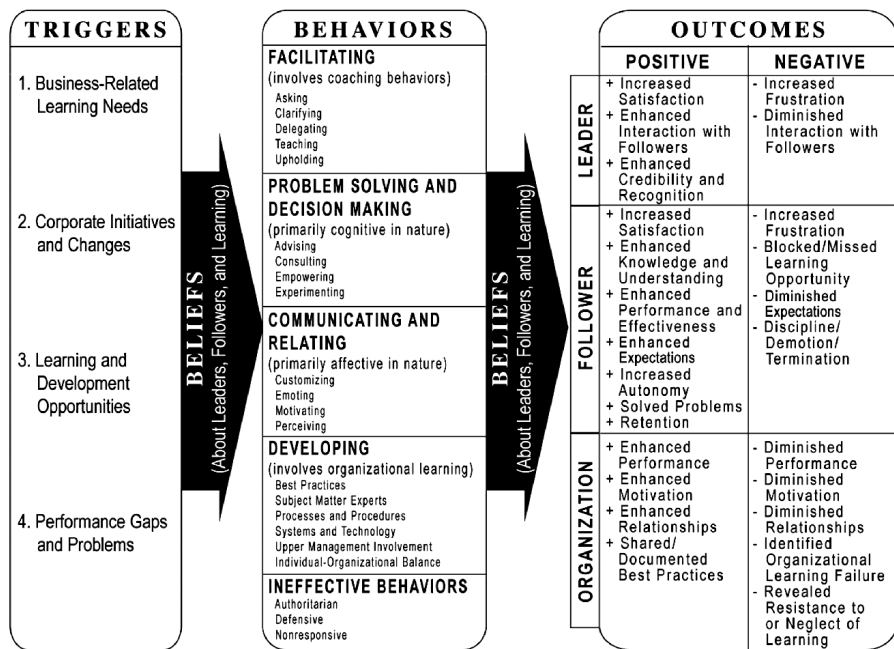

Figure 1.

organizational learning. Finally, both positive and negative outcomes for leaders, followers, and the organization appear on the model.

The overarching question that guided this research study was how leaders facilitate individual and organizational learning. To pursue this line of inquiry, two research questions were posed and are addressed before examining implications for research. First, how do leaders foster and hinder individual follower learning? Like Ellinger (1997), the present study confirmed the coaching/mentoring role as the foundation for fostering individual learning. An informal, approachable communication style creates an open, trusting environment in which leaders facilitate learning through asking questions, clarifying expectations, delegating learning projects, teaching based on their personal experience and example, and upholding standards that foster accountability. Additionally, leaders encourage individual learning through engaging followers both cognitively and emotionally. Problem solving and decision making proceed as leaders dispense advice, consult relevant stakeholders, empower critical thinking and autonomy, and stimulate experimentation in the forms of brainstorming and calculated risk taking. Leaders display emotional intelligence in communicating and relating as they perceive follower needs, establish emotional connections, customize their responses, and reinforce learning through motivating incentives and rewards. Further, since communication is central to fostering learning, the present study reveals non-responsiveness (i.e. lack of communication) as the primary hindrance to learning.

Second, how do leaders foster and hinder organizational learning? Just as the coaching role under girds individual learning, an open, trusting environment forms the foundation for organizational learning. Beyond their responsibility to foster a climate/culture conducive to learning, the present study introduces developing behaviors as an element of institutionalizing learning. Ideally, leaders formally recognize top performers as subject matter experts and capture best practices based on their input and collaboration. Best practices become part of the organization's memory through documentation in the organization's processes, procedures, systems, and technology as well as in the social networks of upper managers and subject matter experts.

Perhaps one of the greatest concerns in comparing facilitative leadership as the basis of the present study to other leadership theories is the charge that facilitative leadership is merely a component of transformational leadership. Indeed, Bass and Avolio asserted that the categories of transformational, transactional, and laissez-faire leadership constitute a full-range model of leadership (Avolio, 1999; Bass, 1985; Bass and Avolio, 1994). Admittedly, behaviors related to individual learning in the present study echo the four behavioral components of transformational leadership. The facilitating theme corresponds to individualized consideration, the theme of problem solving and decision making shares similarities with intellectual stimulation, and the theme of communicating and relating reiterates aspects of idealized influence and inspirational motivation. However, to the extent that findings in the present study replicate the behavioral components of transformational leadership, they also contextualize them as part of the learning process as depicted in Figure 1. Specifically, this study places the behaviors of facilitative leadership within the framework of triggers, beliefs, and outcomes specifically related to individual and organizational learning. Further, the developing theme in the behaviors category expands the discussion of facilitative leadership to include organizational learning mechanisms.

Limitations and recommendations

This study confines itself to the micro-level process of leaders interacting with followers and assumes that some leadership beliefs and behaviors are more conducive to learning than others (Ellinger and Bostrom, 1999, 2002; Slater and Narver, 1995; Waldersee, 1997). Although data collection occured in only one organization, use of the DLOQ confirmed that the research site could be considered a learning organization, which presumably enriches the individual and organizational learning phenomena embedded within it. Typically, scholars criticize case study designs for insufficient rigor and lack of objectivity (Yin, 2003). This study established credibility by posing specific research questions, positioning itself in the scholarly literature, and making explicit its research design and methods (Marshall and Rossman, 1999). Moreover, it achieved confirmability by using a standard interview protocol and by conducting a pilot study.

One inherent limitation in case study research, however, concerns the issue of generalizability (Patton, 2002; Yin, 2003). Clearly, the implications described in this article represent the perceptions of the study's participants within a particular context at a specific time. This study thus attempted to increase generalizability by relying on multiple cases and informants within the research site (Marshall and Rossman, 1999). Specifically, managers representing varying backgrounds and levels of responsibility were selected. Further, both managers and their direct reports were interviewed to overcome the possible response bias of managers' self-reports. Finally, use of the critical incident technique helped minimize recall error by focusing participants on actual situations. In short, although specific limitations are inherent to a qualitative approach, precautions were taken to enhance the rigor of the study.

Based on the discussion of the study's findings and implications, four recommendations for future research emerge. First, the inherent limitations of the research design imply new directions for further study. Some researchers have claimed the most pressing need for future research is in-depth qualitative fieldwork focusing on longitudinal case studies of successes and failures (Easterby-Smith, 1997; Lipshitz and Popper, 2000; Miner and Mezias, 1996). Although the present study represents in-depth qualitative fieldwork, the need for longitudinal studies still exists. Second, a need exists for cross-cultural studies in non-Western organizations (Easterby-Smith, 1997; Lipshitz and Popper, 2000). These studies should focus on the impact of diversity on learning, particularly in inter-organizational initiatives (Araujo, 1998). Additional work is needed to explore learning and external stakeholders such as vendors and suppliers. Industry-wide learning issues also warrant further study (Miner and Haunschild, 1995).

Third, the positive and negative outcomes from the present study could be tested as intervening variables between learning and financial performance (Baldwin and Danielson, 2002). Specifically, the outcomes section should be refined to differentiate between first-order, direct effects and second-order, indirect effects. Last and most importantly, the beliefs and behaviors categories of the present study suggest future research could focus more intensely on communication processes and channels as the heart of individual and organizational learning. Specifically, more attention should be placed on emotional intelligence as it relates to learning. Instead of depicting the facilitation of learning as something leaders do to followers, future research should focus on reciprocal processes of learning enacted through language.

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