GLOBAL EDITION



Organizational Behavior

NINETEENTH EDITION

Stephen P. Robbins | Timothy A. Judge

ORGANIZATIONAL BEHAVIOR

19TH EDITION
GLOBAL EDITION

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Product Marketing: Wendy Gordon, Ashish Jain, and Ellen Harris
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Authorized adaptation from the United States edition, entitled Organizational Behavior, *19th edition, ISBN 978-0-13-747464-6, by Stephen P. Robbins and Timothy A. Judge, published by Pearson Education © 2023.*

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ISBN 10: 1-292-45002-9
ISBN 13: 978-1-292-45002-5
eBook ISBN: 978-1-292-44996-8

British Library Cataloguing-in-Publication Data
A catalogue record for this book is available from the British Library

1 21

Typeset in New Baskerville ITC Pro and 10.5 by Integra Software Services Pvt. Ltd
ebook formatted by B2R Technologies Pvt. Ltd.

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Stephen P. Robbins is Professor Emeritus of Management at San Diego State University and the world's best-selling textbook author in the areas of management and organizational behavior. His books have sold more than 12 million copies; have been translated into 20 languages; and have adapted editions for Canada, Australia, South Africa, India, and the Arab World. Dr. Robbins is also the author of the best-selling books *The Truth About Managing People*, 4th ed. (Pearson, 2014) and *Decide & Conquer*, 2nd ed. (Pearson, 2015).

In his "other life," Dr. Robbins participates in masters' track competitions. Since turning 50 in 1993, he's won 23 national sprint championships; 14 world sprint titles; and set numerous U.S. and world age-group records at 60, 100, 200, and 400 meters. In 2005, Dr. Robbins was elected to the U.S.A. Masters' Track & Field Hall of Fame. A full bio is available at stephenprobbins.com.

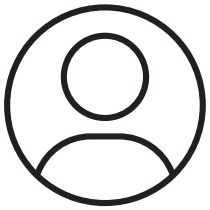


Timothy A. Judge

Ph.D. University of Illinois at Urbana-Champaign

Timothy A. Judge is the Joseph A. Alutto Chair in Leadership Effectiveness, and Executive Director of the Fisher Leadership Initiative, Fisher College of Business, The Ohio State University. In the past, Dr. Judge has been a Fellow of the Cambridge Judge Business School, University of Cambridge, and Visiting Professor, Division of Psychology & Language Sciences, University College London. He has held academic positions at the University of Notre Dame, University of Florida, University of Iowa, Cornell University, and Charles University in the Czech Republic. Dr. Judge's primary research interests are in (1) personality, moods, and emotions; (2) job attitudes; (3) leadership; and (4) careers. Dr. Judge has published more than 155 articles in these and other major topics in refereed journals. He is a fellow of several professional societies, including the American Psychological Association, the Academy of Management, and the International Association of Applied Psychology. Among the many professional acknowledgments of his work, Dr. Judge has received the Heneman Career Achievement Award, the Mahoney Doctoral Mentoring Award, and the Scholarly Achievement Award, all from the Human Resources Division of the Academy of Management. In addition, a 2017 study identified him as the most cited out of more than 8,000 scholars in applied psychology. Dr. Judge is a co-author of *Essentials of Organizational Behavior* with Stephen P. Robbins and *Staffing Organizations* with John Kammeyer-Mueller. Judge's primary nonwork passion revolves around rock climbing and mountaineering. He has climbed the three highest peaks in the United Kingdom and more than half of the highest peaks in the lower forty-eight states. He and his wife Jill are the parents of three children.

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Preface

The World's Most Successful Organizational Behavior Text Is Better Than Ever

This new 19th edition of *Organizational Behavior* continues to distinguish itself by solving today's most pressing teaching and learning challenges in the field of organizational behavior. OB instructors often face a major challenge in keeping up with advancement and innovation in our understanding of people at work. Moreover, students' learning, engagement with, and understanding of OB are framed by the present. Many students wonder about the implications of transformative current events on the world of work.

For instance, the COVID-19 crisis has brought questions to light about whether telecommuting is effective, how work and life interactions can be managed, and the effect of the pandemic's stressors on employee mental and physical well-being. The pandemic has also renewed interest in the burgeoning gig economy and the many ethical and practical issues that follow. Also, the Black Lives Matter and #MeToo movements have sparked considerations of how organizations, leaders, and employees can fight for equality and equity, promote and value diversity, and foster inclusive practices in the workplace. Finally, advancements in technology (e.g., artificial intelligence, machine learning, social media) have revolutionized the way organizations do business. Therefore, the way employees interact with customers, coworkers, and leaders has been changed as well.

In this edition of *Organizational Behavior*, we build upon the basic core of OB knowledge to highlight timely advancements in these topics. Over half of the examples and references have been updated since the previous edition. We have completely revisited, revised, and refreshed the chapters on Diversity, Equity, and Inclusion, Communication, Culture and Change, and Stress and Health to meet these current learning and teaching challenges. Apart from updating half of the in-text features and end-of-text exercises, this edition contains a new feature (Toward a Better World) that highlights social responsibility, justice, and ethics issues facing organizations today. Moreover, we augment the improved topic coverage with supplements designed to enhance the teaching and learning experience.

Lastly, *Organizational Behavior* focuses on translating state-of-the-art theory and research on OB into actionable practices that students can directly apply in the world of work. By focusing on why OB matters in the workplace, students can apply what they learn to their own working experiences, regardless of their field of study. We offer a complete, high-tech support package for both faculty and students. For more information about any of our supplemental resources, please visit the Pearson Higher Education website.

This matrix identifies which features and end-of-chapter material will help you develop specific skills employers are looking for in job candidates.

Employability Skills Matrix (ESM)

	Myth or Science?	An Ethical Choice	Point/ Counterpoint	Toward a Better World	Experiential Exercise	Ethical Dilemma	Case Incident
Critical Thinking & Creativity		✓	✓	✓	✓	✓	✓
Communication	✓				✓	✓	
Collaboration					✓		✓
Self-Management	✓				✓	✓	✓
Social Responsibility		✓	✓	✓	✓	✓	✓
Leadership	✓	✓	✓	✓			✓
Career Management	✓	✓	✓	✓		✓	

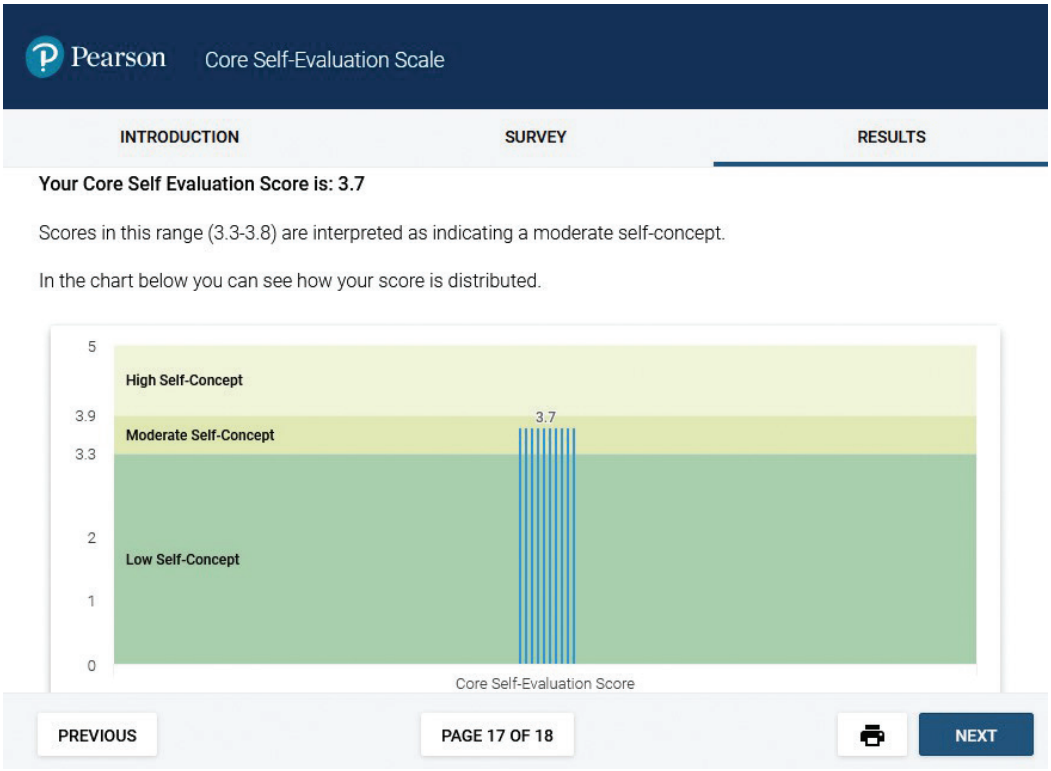
(*Employability Skills Matrix* for Chapter 2)

Employability

An **Employability Skills Matrix** at the beginning of each chapter provides students with a visual guide to features that support the development of skills employers are looking for in today's business graduates, helping students see the relevance of the course to their career goals from the very start of class.

Develop Self-Awareness and an Awareness of Others

The authors have recommended **Personal Inventory Assessments** for each chapter, which are assignable in the MyLab. These assessments help develop professionalism and awareness of oneself and others, skills necessary for future career success.



Additional Application Practice in End-of-Chapter Material

Experiential Activities, **Ethical Dilemmas**, and **Cases** are included at the end of each chapter**.** Also, **five Comprehensive Cases** at the end of the textbook provide more practice than any other text available.

EXPERIENTIAL EXERCISE Managing Remote Teams

Guava is a music streaming service located in Silicon Valley that is steadily growing (with roughly 500 employees currently). Guava has plans to hire many new employees within the coming year. The CEO, Lennox Reynolds, has a vision to permanently transition roughly half of the existing employees to remote work and potentially hire additional remote workers. Reynolds also wants the company to develop a flatter structure. Rather than have departments organized by traditional functions like engineering or marketing, employees would work on project teams and have greater autonomy. Reynolds believes this will allow creativity and innovation to thrive (helping Guava develop a competitive advantage). Reynolds thinks a rigid traditional structure restricts employees and stifles creativity and innovation. Rather than having a single designated leader, teams will allow individuals to emerge as leaders.

development for newer employees, and developing a new structure for making important decisions. Furthermore, all employees were surveyed to assess whether they would choose to work remotely full-time or part-time if given the option. Thirty percent of existing employees said they were very interested in working remotely full-time. Another 20 percent said they were somewhat interested. While some employees have expressed strong preferences for working remotely, other employees and many supervisors have various concerns. Guava needs to decide soon regarding its remote work policy. The decision will impact whether the company chooses to scale back office space and require significant structural changes.

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ETHICAL DILEMMA Credit Where Credit Is Due

You are preparing for the weekly team meeting, during which each team member shares a new idea that they have been working on that week. One idea in particular receives very positive feedback. The idea sticks with you as incredibly innovative, and you remark to your coworker, Aiden, "Wasn't that a great idea that Alex shared?"

she would completely take the idea as her own. But Alex and I work together frequently. I do not want to create an uncomfortable situation." Finally, after a long pause, Aiden says more confidently, "I'm not going to say anything. I think I was overacting."

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CASE INCIDENT Work–Life Balance at R.G. & Company

Tatum is a consultant at R.G. & Company (R.G.), a global consulting firm. She has enjoyed the past few years working at the company. As an ambitious person, she has been focusing on her long-term goal of advancing within the company. Furthermore, Tatum has always been passionate about her work and could not imagine working anywhere else. Nonetheless, working at R.G. as a mother of a young child has not been without its challenges. The company does offer some flexibility in terms of when she is in the office. As long as she completes her work, her supervisors usually do not care if she leaves early or works from home when her daughter is sick.

If Tatum wants a promotion, she believes she needs to make herself stand out among all the company's qualified individuals.

R.G. has policies to accommodate those with family responsibilities. But, in practice, Tatum knows that few employees take advantage of them. For example, Tatum was a little surprised at how quickly her supervisor, Kennedy, returned to the office after having a child. However, Kennedy was much admired at R.G. and was held up as an example that it was possible to have it all—to be a successful working mother. The alternative was for Tatum to transition to working part-time or switch to a less demanding role. Unfortunately, these alternatives would essentially mean putting aside her goal of advancement.

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Real and Relevant Examples

Every chapter is filled with examples to make OB more meaningful and help students recognize course concepts in action. **Profiles of real companies and their leaders** throughout illustrate how course concepts have helped their success.

Ursula Burns, former CEO of Xerox, and the first woman to lead a Fortune 500 company, speaks at the Annual John Wooden Global Leadership Award Dinner. Burns' ability to engage with individuals and be "listener-in-chief" contributed to Xerox's massive growth during her tenure as CEO.
Source: Matt Sayles/Invision/AP/Shutterstock.

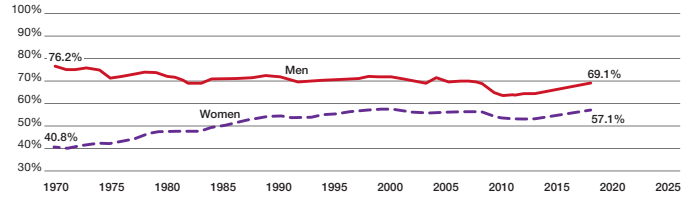
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Bernd Van Jutrczenka/DPA Picture Alliance/Alamy Stock Photo

OB POLL

Percentage of Men and Women Working



Sources: Based on U.S. Bureau of Labor Statistics, "Women in the Labor Force: A Datebook," 2019, https://www.bls.gov/opub/reports/womens-databook/2019/home.htm

The **OB Poll** in each chapter highlights statistics that challenge common assumptions.

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The recently added **Toward a Better World** provides examples of organizations that highlight corporate social responsibility, sustainability, diversity and inclusion, and justice in the workplace. These features help demonstrate how real-world companies approach these issues, both successfully and unsuccessfully.

Toward a Better World

Ben & Jerry's: The Scoop on What It Takes to Be a CSR-Oriented Company

Ben & Jerry's, an ice cream maker headquartered in Vermont, is often touted as the poster child for corporate social responsibility (CSR). From humble beginnings, Ben & Jerry's has a storied history of making unique, chunky ice cream flavors, churning out immense profits on just about a yearly basis, and eventually being acquired by a major corporation. But despite all these changes throughout the company's history, their commitment to a better place. In 2019, for instance, they eliminated 245,000 pounds of plastic packaging, straws, and spoons.

However, Ben & Jerry's has not gone without critique. The pretty picture of what it takes to be a CSR-oriented company often focuses on the successes, but rarely do we see the failures. For instance, in the 1990s, one researcher uncovered actions with good intentions gone wrong. As some examples, many have taken issue with the price of the by OB scientists. For instance, one study focused on CEO letters and interviews with long-tenured employees and newcomers to Ben & Jerry's over a 30-year span. It found that, following the acquisition, employees had to "whipsaw" back and forth between the triple bottom line and the financial performance desired by the post-acquisition CEOs. Further, another research study found that the acquiring organization (Unilever) may have

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Myth or Science?

Work Has to Be Purposeful to Be Motivating

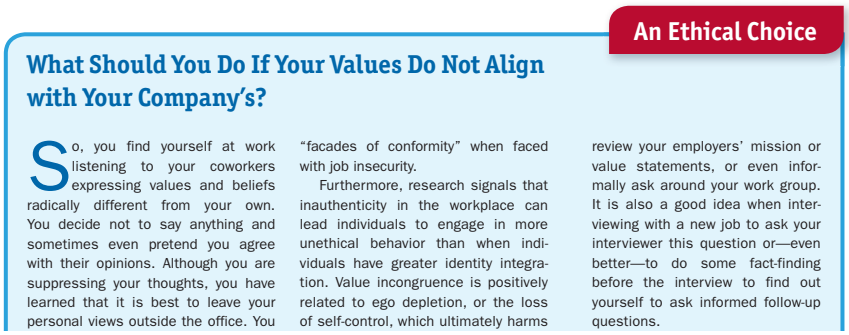
Describing the impact employees' work has on the world has become a familiar strategy that organizations use to inspire employees. For example, Amazon tells employees they are building the future, and Microsoft describes how employees empower individuals and organizations around the world to achieve more. The belief is that if workers view their job as purposeful, organizations can avert demotivation.

However, only a small percentage of employees worldwide, regardless of could have unintended consequences. Although workplaces from IKEA to Microsoft promise meaningful work with a greater purpose, employees' tasks may be routine and disconnected from the inspirational purpose organizations are promising. One survey of seven hundred employees across twenty-two industries demonstrates this disconnect. In this study, all but one employee were able to very quickly identify a trivial or meaningless task that they were required to do regularly for their job. In other words, most employees seem of impact than their actual impact. The result is lower levels of meaning, enjoyment, and motivation.

However, just because some jobs require employees to do more of these routine tasks does not mean these employees have to be any less motivated or engaged. One promising intervention is "superordinate framing." Employees can use this framing tool to think about how seemingly unimportant tasks work to achieve a greater purpose. If organizations invest in helping employees find meaning and purpose in even the most

Myth or Science? engages students with popular opinions, conclusions, or conjectures from the working world, carefully considering whether these conclusions are supported or refuted based on empirical evidence.

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An Ethical Choice

What Should You Do If Your Values Do Not Align with Your Company's?

So, you find yourself at work listening to your coworkers expressing values and beliefs radically different from your own. You decide not to say anything and sometimes even pretend you agree with their opinions. Although you are suppressing your thoughts, you have learned that it is best to leave your personal views outside the office. You "facades of conformity" when faced with job insecurity.

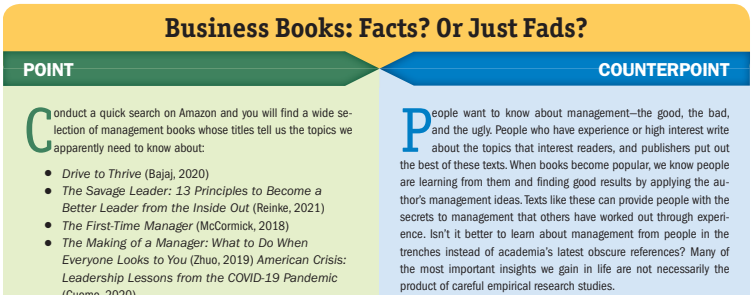
Furthermore, research signals that inauthenticity in the workplace can lead individuals to engage in more unethical behavior than when individuals have greater identity integration. Value incongruence is positively related to ego depletion, or the loss of self-control, which ultimately harms

review your employers' mission or value statements, or even informally ask around your work group. It is also a good idea when interviewing with a new job to ask your interviewer this question or—even better—to do some fact-finding before the interview to find out yourself to ask informed follow-up questions.

An Ethical Choice confronts students with common ethical dilemmas in the working world related to OB topics and how these dilemmas can be approached with fairness, justice, and respect for others.

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The **Point/Counterpoint** at the end of each chapter presents opposing positions on hot topics in Organizational Behavior to help students learn to think critically.


Business Books: Facts? Or Just Fads?

POINT

Conduct a quick search on Amazon and you will find a wide selection of management books whose titles tell us the topics we apparently need to know about:

- *Drive to Thrive* (Bajaj, 2020)
- *The Savage Leader: 13 Principles to Become a Better Leader from the Inside Out* (Reinke, 2021)
- *The First-Time Manager* (McCormick, 2018)
- *The Making of a Manager: What to Do When Everyone Looks to You* (Zhuo, 2019) *American Crisis: Leadership Lessons from the COVID-19 Pandemic*

COUNTERPOINT

People want to know about management—the good, the bad, and the ugly. People who have experience or high interest write about the topics that interest readers, and publishers put out the best of these texts. When books become popular, we know people are learning from them and finding good results by applying the author's management ideas. Texts like these can provide people with the secrets to management that others have worked out through experience. Isn't it better to learn about management from people in the trenches instead of academia's latest obscure references? Many of the most important insights we gain in life are not necessarily the product of careful empirical research studies.

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Key Changes to the Nineteenth Edition

- *NEW Opening Vignettes* in several chapters bring current business trends and events to the forefront.
- *NEW AND SUBSTANTIALLY REVISED* chapters, including Chapter 2, "Diversity, Equity, and Inclusion in Organizations"; Chapter 11, "Communication"; Chapter 16, "Organizational Culture and Change"; and Chapter 18, "Stress and Health in Organizations," overhaul the content from prior editions to represent the newest cutting-edge perspectives on these topics in OB.
- *NEW AND UPDATED* content in every chapter reflects the most current developments in OB research. This new content (over 800 new examples and references) particularly emphasizes the following topics:
  - Diversity, equity, and inclusion (DEI)
  - COVID-19 and crisis management
  - Remote work and telecommuting
  - The gig economy
  - Artificial intelligence (AI), social media, and technology
- *NEW* photos and captions added in each chapter link the chapter content to contemporary, real-life worldwide situations to enhance students' understanding of hands-on application of concepts.
- *NEW* Point/Counterpoint features reflect ongoing tensions between perspectives in OB, focusing students' attention on new topics in 9 of 18 chapters.
- The following within-chapter material is either completely new or substantially revised and updated for each chapter, bringing to light novel issues confronting organizations, leaders, and workers:
  - *Point/Counterpoint* (8 of 18 total)
  - *An Ethical Choice* (9 of 18 total)
  - *OB Poll* (9 of 18 total)
  - *Myth or Science?* (9 of 18 total)

- The following end-of-chapter material is either completely new or substantially revised and updated for each chapter, bringing the most contemporary thinking to the attention of students:
  - *Experiential Exercise* (9 of 18 total)
  - *Ethical Dilemma* (9 of 18 total)
  - *Case Incidents* (13 of 18 total)
- Updated Employability Matrices and Application and Employability sections in every chapter.
- Updated Summaries, Implications for Managers, and Questions for Review at the end of every chapter.
- Updated with nearly 1,500 new examples, citations, and references throughout the text.

Chapter-by-Chapter Changes

Chapter 1: What Is Organizational Behavior?

- Revised *Learning Objectives*
- Revised/updated sections: Management and *Organizational Behavior*, Challenges and Opportunities, Coming Attractions: Developing an OB Model
- New sections: Corporate Social Responsibility (CSR), The Gig Economy, OB During Crises
- New *Opening Vignette* (The Rise and Fall of WeWork's CEO)
- New *Toward a Better World* (Ben & Jerry's: The Scoop on What It Takes to Be a CSR-Oriented Company)
- New *An Ethical Choice* (What Should You Do If Your Values Do Not Align with Your Company's?)
- New *Experiential Exercise* (Managing Remote Teams)
- New *Ethical Dilemma* (Credit Where Credit Is Due)
- New *Case Incident* (Work–Life Balance at R.G. & Company)
- Updated research on work roles in organizations, organizational behavior core topics, evidence-based management, intuition, big data, artificial intelligence, continuing globalization, workforce diversity and inclusion, technology and social media, (un)ethical behavior, OB outcomes, withdrawal behavior, productivity
- Updated Exhibit 1-3 *Toward an OB Discipline*
- Updated Exhibit 1-5 *A Basic OB Model*
- Updated Exhibit 1-6 *The Plan of the Text*
- Updated *OB Poll* (Percentage of Men and Women Working)
- Updated *Point/Counterpoint* (Business Books: Facts? Or Just Fads?)

Chapter 2: Diversity, Equity, and Inclusion in Organizations

- Revised *Learning Objectives*
- Revised/updated sections: Understanding Diversity, Implementing Diversity Management
- New sections: Prejudice and Discrimination in Organizations; Prejudice and Implicit Bias; Discrimination, Disparate Impact, and Treatment; Subtle Discrimination in the Workplace; Theoretical Perspectives on Prejudice, Discrimination, and Diversity; Social Categorization; Stereotyping, Stereotype Threat, and Stigma; System Justification and Social Dominance; Intersectionality and the Cultural Mosaic; Group Composition; Faultlines; Cross-Cultural

Organizational Behavior (OB); Hofstede's Framework; The GLOBE Framework; Cultural Tightness and Looseness; Cultural Intelligence (CQ); Theoretical Basis Underlying Diversity Management; Cultures and Climates for Diversity; The Challenge of Diversity Management
- New *Toward a Better World* (Hot Chicken Takeover: Putting Restorative Justice into Practice)
- New *Point/Counterpoint* (Using Artificial Intelligence for Hiring Leads to Greater Diversity)
- New *Ethical Dilemma* (Should You Question an Employer About Its DEI Policy?)
- New Exhibit 2-2 *The Cultural Mosaic*
- New Exhibit 2-3 *Hofstede's Cultural Values by Nation*
- New Exhibit 2-4 *Hofstede–GLOBE Comparison*
- Updated research on levels of diversity, biographical characteristics, religion, expatriate adjustment, diversity management, diversity management practices
- Updated *OB Poll* (Gender Pay Gap: Narrowing but Still There)
- Updated *An Ethical Choice* (Affirmative Action for Unemployed Veterans)
- Updated Exhibit 2-1 *Forms of Discrimination*

Chapter 3: Job Attitudes

- Revised *Learning Objectives*
- Revised/updated sections: Attitudes, Attitudes and Behavior, Job Attitudes, Job Satisfaction, Organizational Commitment, What Causes Job Satisfaction?, Outcomes of Job Satisfaction, The Impact of Job Dissatisfaction
- New sections: Job Attitudes in the Gig Economy
- New *Toward a Better World* (Nvidians: Together Transforming Communities Around the World)
- New *Point/Counterpoint* (Earning That Promotion May Be Key to Higher Job Satisfaction)
- New *Experiential Exercise* (Managing Political Views in the Office)
- Updated research on organizational identification, organizational commitment, perceived organizational support, employee engagement, racial and ethnic differences in job satisfaction levels, job conditions, personality and individual differences (in job satisfaction), pay, life satisfaction, counterproductive work behavior, financial implications of job attitudes
- Updated *An Ethical Choice* (Office Talk)
- Updated *Exhibit 3-2* (Worst Jobs of 2019 for Job Satisfaction)
- Updated *Exhibit 3-3* (Average Job Satisfaction Levels by Facet)
- Updated *Exhibit 3-4* (Average Levels of Employee Job Satisfaction by Country)
- Updated *Ethical Dilemma* (Tell-All Websites)

Chapter 4: Emotions and Moods

- Revised/updated sections: What Are Emotions and Moods?, Sources of Emotions and Moods, Emotional Labor, Affective Events Theory, Emotional Intelligence, Emotion Regulation, OB Applications of Emotions and Moods
- New *Opening Vignette* (Bringing Your Sense of Humor to Work)
- New *Myth or Science?* (All Employees Experience Emotional Labor in the Same Way)
- New *Toward a Better World* (Scream Agency: Harnessing Customer Emotions to Bolster CSR)
- New *Case Incident* (Performance Review Shock: Being Told How to Feel and Act)

- Updated research on positive and negative affect, the basic emotions, moral emotions, ideal affect, sources of emotions and moods (e.g., personality, weather, social interactions, sleep, exercise, gender identity), controlling emotional displays, affective events, emotional intelligence, emotion regulation influences and outcomes, emotion regulation techniques, ethics of emotion regulation, emotions in HR practices (e.g., selection, leadership, negotiation, customer service, safety), emotions and (un)ethical behavior
- Updated *Point/Counterpoint* (Sometimes Yelling Is for Everyone's Good)
- Updated *Exhibit 4-1* (Affect, Emotions, and Moods)

Chapter 5: Personality and Individual Differences

- Revised *Learning Objectives*
- Revised/updated sections: Linking Individuals to the Workplace, Personality, Personality Frameworks, Other Personality Attributes Relevant to OB, Personality and Situations, Values
- New sections: Ability, Intellectual Abilities, Physical Abilities
- New *Opening Vignette* (The Rise and Fall of Theranos)
- New *Toward a Better World* (Uber: In the Median or Back on the Road Again?)
- New *OB Poll* (Are Personality Assessments Only Used for High-Level Positions?)
- New *An Ethical Choice* (Do Certain Personality Traits Make You More Unethical?)
- New *Experiential Exercise* (Acing the Interview)
- New *Ethical Dilemma* (How Long Should You Wait Before Deciding If a Job Is Not a Good Fit?)
- New *Case Incident* (Sky Energy)
- Updated research on person–job fit, person–organization fit, person–group fit, person–supervisor fit, personality traits, personality measurement, the Myers-Briggs Type Indicator (MBTI), the Big Five Personality Model, the Dark Triad, the DiSC framework, the HEXACO model, core self-evaluation (CSE), self-monitoring, proactive personality, situation strength theory, trait activation theory, terminal versus instrumental values, generational values
- Updated *Myth or Science?* (We Can Accurately Judge Individuals' Personalities a Few Seconds After Meeting Them)
- Updated Exhibit 5-5 *Dimensions of Intellectual Ability*
- Updated Exhibit 5-6 *Nine Basic Physical Abilities*
- Updated Exhibit 5-7 *Dominant Generational Work Values in Today's Workforce*

Chapter 6: Perception and Individual Decision Making

- Revised/updated sections: What Is Perception?; Person Perception; The Link Between Perception and Individual Decision Making; Decision Making in Organizations; Influences on Decision Making: Individual Differences and Organizational Constraints; Ethics in Decision Making; Creativity, Creative Decision Making, and Innovation in Organizations
- New sections: (Perception and) Social Media, Potential Remedies (for Shortcuts in Organizations), Outcome Bias, Decision Making in Times of Crisis
- New *Toward a Better World* (Volkswagen: Going Green or Just Greenwashing)
- New *OB Poll* (Are Managers Using Decision-Making Time Effectively?)
- New *An Ethical Choice* (Are We as Ethical as We Think We Are?)
- New *Experiential Exercise* (Bringing Life to a Food Desert)
- Updated research on factors that influence perception, attribution theory, self-serving biases, common shortcuts in judging others (e.g., selective perception, halo and horns, contrast effects, stereotyping), applications of shortcuts in organizations, problems and decisions, rational decision making,

bounded rationality, intuition, common biases and errors in decision making (e.g., overconfidence, anchoring, confirmation, availability, escalation of commitment, randomness, risk aversion, hindsight), individual differences in decision making (e.g., personality, gender identity, intellectual abilities), organizational constraints on decision making (e.g., formal regulations, time constraints, historical precedents), choosing between ethical criteria, behavioral ethics, lying, creative behavior (e.g., idea generation and evaluation), causes of creative behavior (e.g., creative potential, creative environments), creative outcomes

Chapter 7: Motivation Concepts

- Revised *Learning Objectives*
- Revised/updated sections: Motivation Defined, Classic Theories of Motivation, Contemporary Theories of Motivation: Content-Based, Contemporary Theories of Motivation: Context-Based, Contemporary Theories of Motivation: Process-Based, Organizational Justice
- New sections: Contemporary Theories: A Primer, Regulatory Focus Theory, Goal Orientation, Goal Conflict
- New *Opening Vignette* (Engaging Employees at Salesforce)
- New *OB Poll* (Is a Lack of Motivation the Biggest Issue Remote Workers Face?)
- New *Myth or Science?* (Work Has to Be Purposeful to Be Motivating)
- New *Toward a Better World* (Kroger: Zero Hunger, Zero Waste)
- New *Point/Counterpoint* (Feel-Good Messaging Is More Motivating Than Instrumental Messaging)
- New *Experiential Exercise* (How Do You Motivate an Employee?)
- New *Case Incident* (Why Lead by Example?)
- Updated research on motivation defined, hierarchy of needs theory, McClelland's theory of needs, self-determination theory, job engagement, reinforcement theory, social learning theory, expectancy theory, goal-setting theory, self-efficacy theory, equity theory, organizational justice, distributive justice, procedural justice, interactional justice, justice outcomes, culture and justice

Chapter 8: Motivation: From Concepts to Applications

- Revised *Learning Objectives*
- Revised/updated sections: Motivating by Job Design: The Job Characteristics Model (JCM), Job Redesign, Alternative Work Arrangements, Employee Involvement, Using Extrinsic Rewards to Motivate Employees, Using Benefits to Motivate Employees, Using Intrinsic Rewards to Motivate Employees
- New *Opening Vignette* (Teacher Merit Pay: Is It the Solution?)
- New *Myth or Science?* (Job Crafting Is a Practical Way to Reduce Boredom and Burnout)
- New *Toward a Better World* (Sociabble Trees: Rewarding Through Reforestation)
- New *Ethical Dilemma* (Playing Favorites?)
- New *Case Incident* (JP Transport)
- Updated research on job design, efficacy of the JCM, job redesign, job rotation, job enrichment, relational job design, alternative work arrangements, flextime, job sharing, telecommuting (and the implications of COVID-19), employee involvement programs (EIP), pay structures, variable-pay programs (e.g., pay secrecy, piece-rate pay, merit pay, bonuses, profit sharing, employee stock ownership plans), benefits, flexible benefits, employee recognition programs
- Updated *OB Poll* (Who Works from Home?)

Chapter 9: Foundations of Group Behavior

- Revised/updated sections: Defining and Classifying Groups; Group Property 1: Roles; Group Property 2: Norms; Group Property 3: Status, and Group Property 4: Size and Dynamics; Group Property 5: Cohesion; Group Decision Making
- New *Opening Vignette* (Confronting Deviant Norms)
- New *OB Poll* (What Types of Workplace Deviance Are Most Common?)
- New *An Ethical Choice* (Managing a Narcissist in the Group)
- New *Toward a Better World* (Whirlpool: Building Cohesion Through Volunteering)
- New *Point/Counterpoint* (Conformity Is Counterproductive and Should Be Avoided)
- New *Ethical Dilemma* (Follow the Leader?)
- New *Case Incident* (Cultural Context and Group Dynamics)
- Updated research on social identity, group roles, role perception, role expectations, psychological contracts, role conflict, group norms (e.g., the roles of emotions and culture, effects on group outcomes, conformity), group status (e.g., the relationship between norms and status, the role of group interaction, status inequity), group size, social loafing, group cohesion, group decision making, groupthink and groupshift

Chapter 10: Understanding Work Teams

- Revised *Learning Objectives*
- Revised/updated sections: Differences Between Groups and Teams, Types of Teams, Creating Effective Teams, Turning Groups of Employees into Teams
- New sections: Crises and Extreme Contexts
- New *Opening Vignette* (Resilient Teams)
- New *Toward a Better World* (Hershey: Advancing Diversity, Equity, and Inclusion Through Groups and Teams)
- New *Myth or Science?* (Teams Should Practice Collective Mindfulness)
- New *OB Poll* (Why Do Some Employees Not Like Working on Teams?)
- New *Point/Counterpoint* (Team Building Exercises Are a Waste of Time)
- Updated research on work teams, problem-solving teams, self-managed work teams, cross-functional teams, virtual teams (and COVID-19 implications), multiteam systems, team effectiveness, team context (e.g., leadership, structure, culture, climate, performance evaluation, reward systems), team composition (e.g., abilities, personalities, allocation of roles, organizational demography), team size, team processes and states (e.g., reflexivity, mental models, conflict, motivation, efficacy, identity, cohesion, team selection, team training, team rewards)
- New *Case Incident* (Psychological Safety and Team Effectiveness)
- Updated Exhibit 10-3 *Team Effectiveness Model*
- Updated Exhibit 10-4 *Key Roles of Teams*

Chapter 11: Communication

- Revised *Learning Objectives*
- Revised/updated sections: Modes of Communication, Choosing Communication Methods, Cross-Cultural Communication
- New sections: Synchronicity; Conversations, Discussions, and Listening; Speeches; Natural Language Processing; Body Language and Movement; Contact and Senses; Physical Space and the Use of Time; Communicating in Times of Crisis (with COVID-19 implications); Advancements in Virtual Communication; Blogging, Vlogging, and Podcasting; E-collaboration and

E-learning; The Currency of Virtual Communication: Emojis, Usernames, Selfies, and More; Smartphones, Social Media, and Cybersecurity; Smartphones (and Other Smart Devices); Smartphones and Stress, Health, and Well-Being; Other Smart Devices; Most of Us Use It, but What Is Social Media Anyway?; You Are What You Post: Personality via Social Media; The Personal and Relational Outcomes of Social Media; The Organizational Outcomes of Social Media; The Interface Between Cultures
- New Exhibit 11-1 *Active and Reflective Listening in Oral Communication*
- New Exhibit 11-2 *Time Spent Checking E-mail at Work*
- New Exhibit 11-3 *Guide to Choosing Communication Methods*
- New Exhibit 11-6 *Cross-Cultural Interaction Approaches*
- New *Myth or Science?* (Better Listening Is the Key to Better Working Relationships)
- New *OB Poll* (Is It Appropriate and Common to Use Texting for Work Purposes?)
- New *Toward a Better World* (Mobile Citizen and Mobile Beacon: Two Companies Enhancing Access to Smartphones and the Internet)
- New *An Ethical Choice* (What Should You Do If an Employee Is Being Cyberbullied or Harassed Online?)
- New *Point/Counterpoint* (Work Friendships Are Not a Good Idea)
- New *Case Incident* (How Do You Communicate That You Are Passionate During an Interview?)
- Updated research on communication, oral communication (e.g., meetings), written communication (e.g., e-mail, instant messaging, text messaging, natural language processing), nonverbal communication, choosing communication methods, barriers to effective communication (e.g., information overload and communication apprehension), channel richness, videoconferencing, blogging, social media, cybersecurity, cross-cultural communication, the cultural context, aspects of cultural communication (e.g., semantics, word connotations, tone differences, tolerance and methods for resolving conflict), cross-cultural communication guidelines
- Updated *Ethical Dilemma* (BYOD)

Chapter 12: Leadership

- Revised *Learning Objectives*
- Revised/updated sections: Trait Theories, Behavioral Theories, Contingency Theories, Positive Leadership Styles and Relationships, The (Un)ethical Aspects of Leadership, Leadership and Trust, Challenges and Opportunities to Our Understanding of Leadership
- New sections: Proactive Personality Traits, Shared Leadership Theory, Followership Theory, Leading in Times of Crisis (with COVID-19 implications), What Makes Transformational Leadership So Great?, Are There Downsides to Transformational Leadership?
- New Exhibit 12-2 *Manager Leadership Styles by Behavior in Situational Leadership Theory*
- New *Opening Vignette* (The Time Is Now)
- New *An Ethical Choice* (The Ethics of Nudging)
- New *Toward a Better World* (The Institute for Corporate Social Responsibility [iCSR]: Training Leaders to Work Toward a Better Tomorrow)
- New *OB Poll* (Leadership Representation in Organizations)
- New *Myth or Science?* (Leaders Can Be Trained)

- Updated research on leadership and diversity, trait theories, big five traits and leadership, dark triad traits and leadership, emotional intelligence and leadership, initiating structure, consideration, contingency theories, the Fiedler Model, situational leadership theory, follower theories, leader-participation model, leader-member exchange (LMX) theory, charismatic leadership, full range leadership model (e.g., laissez-faire, transactional, transformational), comparison and evaluation of positive leadership styles, authentic leadership, (un)ethical leadership, servant leadership, abusive supervision, leadership and trust (e.g., trust propensity, the role of time, trust repair), leadership as an attribution, neutralizers of and substitutes for leadership, identifying and selecting leaders, training and developing leaders, mentorship
- Updated Exhibit 12-5 *Full Range Leadership Model*
- Updated Exhibit 12-6 *Characteristics of Full Range Leadership Styles*

Chapter 13: Power and Politics

- Revised/updated sections: Power and Leadership, Bases of Power, Dependence: The Key to Power, Influence Tactics, How Power Affects People, Politics: Power in Action, The Causes and Consequences of Political Behavior
- New sections: Formal Small-Group Networks; Automatic and Controlled Processing of Influence, Gossip and the Grapevine, Factors Contributing to Political Behavior Acquiescence, Voice and Silence
- New *Opening Vignette* (Empire of Pain)
- New *Toward a Better World* (Old Mutual: Realizing a Sustainability Vision Through Influence)
- New *Myth or Science?* (Office Politics Should Be Avoided Altogether)
- New *Point/Counterpoint* (Emphasize the Strategies Women Can Use to Get Ahead)
- New *Experiential Exercise* (The Turnaround Task Force)
- New *Case Incident* (Imperium Omni)
- Updated research on power, dependence, formal power (e.g., coercive, reward, legitimate), personal power (e.g., expert, referent), power base effectiveness, sources of dependence (e.g., importance, scarcity, and nonsubstitutability), social network analysis, influence tactics, political skill, power dynamics, sexual harassment, political behavior, the reality of politics, zero-sum approach, peoples' responses to organizational politics, impression management (e.g., in interviews and performance evaluations), ethics of behaving politically
- Updated *OB Poll* (Networking Key Factor in Employee Advancement)
- Updated *Ethical Dilemma* (Sexual Harassment and Office Romances)
- Updated Exhibit 13-1 *Three Common Small-Group Networks*
- Updated Exhibit 13-2 *Small-Group Networks and Effectiveness Criteria*
- Updated Exhibit 13-3 *An Organizational Sociogram*
- Updated Exhibit 13-4 *Preferred Influence Tactics by Influence Direction*
- Updated Exhibit 13-8 *Impression Management (IM) Techniques*

Chapter 14: Conflict and Negotiation

- Revised *Learning Objectives*
- Revised/updated sections: A Definition of Conflict, The Conflict Process, Negotiation, The Negotiation Process, Individual Differences in Negotiation Effectiveness, Negotiating in a Social Context, Third Parties in Negotiations

- New Exhibit 14-3 *Conflict-Handling Intentions*
- New *Opening Vignette* (The Merkel Model)
- New *Myth or Science?* (Good Negotiators Rely on Intuition)
- New *Toward a Better World* (ALDI: Downstream Environmental and Social Implications of Supplier Negotiations)
- New *An Ethical Choice* (Ethical Challenges in Negotiation)
- New *Ethical Dilemma* (To Intervene or Not to Intervene?)
- Updated research on conflict, (dys)functional conflict, types of conflict (e.g., task conflict, process conflict), conflict moderators, loci of conflict, perceiving potential opposition or incompatibility (e.g., the role of communication, structure, personal variables), conflict cognition and personalization (e.g., perceived vs. felt conflict), conflict-handling intentions, conflict outcomes, conflict management, negotiation, bargaining strategies (e.g., distributive bargaining, first-offer anchoring, strategy, career management, integrative bargaining), the negotiation process (e.g., preparation and planning), BATNAs, individual differences in negotiation effectiveness (e.g., personality traits, moods and emotions, culture, race, gender), third-parties in negotiations (e.g., arbitrators and conciliators)
- Updated *OB Poll* (Gender Differences in Salary Negotiations)

Chapter 15: Foundations of Organization Structure

- Revised/updated sections: What Is Organizational Structure?, Common Organizational Frameworks and Structures, Newer Trends in Organizational Design, The Leaner Organization: Downsizing, Why Do Structures Differ?, Organizational Design and Employee Behavior
- New Exhibit 15-7 *A Circular Structure*
- New *Myth or Science?* (Bureaucracy Is the Enemy of Innovation and Productivity)
- New *Toward a Better World* (Grove Collaborative: Innovating in the CSR and Sustainability Market Space)
- New *Experiential Exercise* (Remote Work)
- New *Ethical Dilemma* (The Ethics of Layoffs)
- Updated research on organizational structure, work specialization, departmentalization (e.g., product, service, geographical, process, divisions), chain of command (e.g., authority, unity of command), (de)centralization, formalization, boundary spanning, simple structures, bureaucracies, matrix structures, virtual structures (e.g., network, hollow, franchise, modular, starburst forms), team structures, circular structures, downsizing, mechanistic vs. organic models, organizational strategy (e.g., innovation, cost-minimization, imitation), technology and structure, organizations' environments (e.g., capacity, volatility, complexity), institutions
- Updated *OB Poll* (The Incredible Shrinking Office)

Chapter 16: Organizational Culture and Change

- Revised *Learning Objectives*
- Revised/updated sections: What Is Organizational Culture?, How Employees Learn Cultures, Creating and Sustaining Culture, What Do Cultures Do?, Influencing Organizational Cultures
- New sections: Developing an Innovative Culture, Sources of Innovation, Context and Innovation, Idea Champions and Innovation, Change, The Nature of Change, Resistance to Change, Overcoming Resistance to Change, The Politics of Change, Approaches to Managing Organizational Change, Lewin's Three-Step Model, Kotter's Eight-Step Plan, Action Research, Organizational Development, Process Consultation, Team Building, Intergroup Development, Appreciative Inquiry, The Change Paradox

- New Exhibit 16-2 *The Effect of Culture on Organizational Outcomes*
- New Exhibit 16-6 *How Organizational Cultures Have an Impact on Employee Performance and Satisfaction*
- New *Opening Vignette* (The Wolf Culture)
- New *OB Poll* (Exceptional Socialization Shapes Employee Expectations)
- New *Toward a Better World* (Morgan Stanley: Sustainable and Ethical Organizational Cultures Influence Investment Decisions)
- New *Point/Counterpoint* (Organizational Change Management Is Not Worth the Effort)
- New *Ethical Dilemma* (Toxic Culture)
- Updated research on organizational culture concepts and definitions, competing values framework, organizational culture frameworks (e.g., organizational culture inventory, organizational culture profile), subcultures, strong versus weak cultures, stories, rituals, symbols, language, how culture begins, how culture is kept alive (e.g., selection and socialization), honeymoon/hangover effects, the functions of culture, organizational climate, how culture creates climate, culture as an asset (e.g., ethical, sustainable, innovative), culture as a liability (e.g., stagnation and entrenchment, uniformity and rigidity, toxicity and dysfunctions), culture clashes, developing a positive culture
- Updated *An Ethical Choice* (A Culture of Compassion)

Chapter 17: Human Resource Systems and Practices

- Revised *Learning Objectives*
- Revised/updated sections: Recruitment, Initial Selection, Substantive and Contingent Selection, Training and Development, Performance Management, Human Resources (HR) Leadership
- New sections: Applicant Attraction, The Ubiquity of Referral Hiring, The Role of Recruiters, Training Content, Instructional System Design, Active Learning, Interactive Learning, Electronic Performance Monitoring (EPM), Accessible Workplaces, Accommodations for Physical Disabilities, Accommodations for Hidden Disabilities
- New *Opening Vignette* (No Résumé Needed)
- New *OB Poll* (How Are Job-Seeking Managers Recruited?)
- New *An Ethical Choice* (Eliminating Bias from Performance Reviews)
- New *Toward a Better World* (Kawasaki: Learning from Each Other at Takumi Juku and Manabiya)
- Updated research on HR and OB linkage, recruitment, realistic job previews, human capital resources, the selection process, initial selection (e.g., application forms, résumés, cover letters), background checks (e.g., reference checks, letters of recommendation, social media "checks," credit history, criminal background), written tests (e.g., intelligence, personality, integrity), performance-simulation tests (e.g., work samples, assessment centers, situational judgment tests), interviews (e.g., structured), contingent selection (e.g., drug testing, medical examinations), training, transfer of training, training methods, e-Learning, evaluating training effectiveness, performance management, performance management targets (e.g., individual task outcomes, traits), evaluators (e.g., 360-degree appraisals, selective evaluations), performance evaluation methods (e.g., written comments, ranking), performance appraisal fairness, performance feedback, high-performance work systems (HPWS)
- New *Case Incident* (Fired via Video Message)

Chapter 18: Stress and Health in Organizations

- Revised *Learning Objectives*
- Revised/updated sections: The Nature of Stress in Organizations, Managing Stress and Health
- New sections: Physical Health at Work, Sleep, Illness and Injury, Personal and Work Risk Factors, Mental Health at Work, Job Insecurity, Workaholism, Psychological Distress at Work, Burnout, Depression, Mechanisms of Health and Stress, Conservation of Resources, Effort-Reward Imbalance Model, Job Demand-Control-Support Model, Job Demands-Resources Model, Work–Life Balance, The State of Work–Life Balance: A New Normal? (with COVID-19 implications), Work–Life Boundaries, Work–Life Spillover, Work–Life Conflict, Work–Life Enrichment, Flexible and Supportive Policies, Building Resilience
- New Exhibit 18-4 *The Job Demand-Control-Support Model*
- New Exhibit 18-5 *The Job Demands-Resources Model*
- New Exhibit 18-6 *Boundary Management Tactic Examples*
- New *Opening Vignette* (Beating Burnout)
- New *Toward a Better World* (Freelancers Union: Advocating for Gig Workers Faced with Consistent Job Insecurity)
- New *An Ethical Choice* (Talking About Mental Health Without Overstepping Boundaries)
- New *Experiential Exercise* (Micro-Stressors)
- New *Case Incident* (Burnout Despite Flexibility: Working Parents and COVID-19)
- Updated research on stress and health issue prevalence, stress concepts, stressors (e.g., environmental, personal, additive), strain (e.g., physiological, psychological), eustress, allostasis, managing health and stress (e.g., individual and organizational), time management skills, focusing on mental wellness and physical fitness, practicing relaxation and mindfulness, seeking social support, (re)designing jobs, enabling a remote work option (with COVID-19 implications), offering recovery experiences, wellness programs
- Updated Exhibit 18-1 *Work Is One of the Top Sources of Stress for Young Adults (Ages 18–23)*
- Updated Exhibit 18-2 *A Model of Stress*
- Updated *OB Poll* (Paralyzed? Or Invigorated by Stress?)

Instructor Teaching Resources

Detailed information and resources are available at www.pearson.com.

Acknowledgments

Getting this book into your hands was a team effort. It took faculty reviewers and a talented group of designers and production specialists, editorial personnel, and marketing and sales staff.

The nineteenth edition was peer-reviewed by many experts in the field. Their comments, compliments, and suggestions have significantly improved the final product. The authors would also like to extend their sincerest thanks to the following instructors:

Joshua R. Allen, Boston College
Joy Beatty, University of Michigan - Dearborn
David Biemer, Texas State University
Richard Blackburn, University of North Carolina Chapel Hill
Audrey Blume, Wilmington University
Tony Boloutchi, Florida State College at Jacksonville
E. Holly Buttner, University of North Carolina at Greensboro
Min Carter, Southern Illinois University
Olga Chapa, University of Houston Victoria
Debra Conway, Ramapo College
Lauryn De George, University of Central Florida
Eric Dent, Florida Gulf Coast University
Stephanie Dunn, University of North Texas
Susan Epstein, Drexel University
Yifeng Fan, Fairfield University
Jeffrey Fouts, Syracuse University
Lynda Fuller, Wilmington University
Carolina Gomez, Florida International University
Matthew Griffith, University of Texas at El Paso
Nathan Hartman, Illinois State University
Laura Hickerson, James Madison University
Lawrence Houston, Oregon State University
John Keiser, State University of New York, Brockport
Julia Levashina, Kent State University
Terry Lowe, Illinois State University
Gerardo Miranda, University of Texas Rio Grande Valley
Byron Lynn Morgan, Texas State University
Lori Muse, California State University, Fullerton
Jeananne Nicholls, Slippery Rock University
Roberta Pellant, Bentley University
Matt Quade, Baylor University
Betsy Rock, Oregon State University
Nancy Rossiter, Florida State College at Jacksonville
Sharon Segrest, University of South Florida
Jae Webb, University of North Texas
Jonathan Ying, Purdue University
Marilyn Young, The University of Texas at Tyler

The authors especially want to thank Dr. David R. Glerum for his hard work on manuscript revisions, editing, and preparation.

We owe a debt of gratitude to all those at Pearson who have supported this text over the past 30 years and have worked so hard on developing this latest edition. We want to thank Beth Kaufman, Senior Content Analyst; Claudia Fernandes, Senior Content Producer; and Gina Linko, Project Manager at Integra. We would also like to thank Ashley DePace, Senior Product Marketing Manager; Debi Henion, Manager of Product Sales Specialists; and their sales staff, who have been selling this text over its many editions. Thank you for the attention you have given to this text.

Global Edition Acknowledgments

Pearson would like to thank the following people for their work on the Global Edition:

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1 What Is Organizational Behavior?



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LEARNING OBJECTIVES

After studying this chapter, you should be able to:

- **1-1** Define *organizational behavior (OB).*
- **1-2** Show the value of systematic study to OB.
- **1-3** Identify the major behavioral science disciplines that contribute to OB.
- **1-4** Demonstrate why few absolutes apply to OB.
- **1-5** Identify managers' challenges and opportunities in applying OB concepts.
- **1-6** Compare the three levels of analysis in this text's OB model.
- **1-7** Describe the key employability skills gained from studying OB that are applicable to other majors or future careers.

THE RISE AND FALL OF WEWORK'S CEO

Adam Neumann and his vision for reinventing work appeared to flourish overnight with the success of his company, WeWork. Although shared offices existed long before the rise of WeWork, early coworking spaces were not the most desirable. In contrast, what WeWork had to offer was a holistic approach that could provide services anywhere—from one person to one hundred people. The company took coworking to the next level by offering many of the services that can make starting a business tough, including IT, financial, and legal services. However, WeWork's expansion did not come without a cost, especially when the company opened on average two locations each day at its peak.

Although Neumann has his fair share of critics, his vision was likely responsible for at least part of WeWork's impressive growth. He is known for his charisma, willingness to take bold risks, and entrepreneurial vision. On the other hand, his somewhat unorthodox leadership style is probably also to blame for some of the problems WeWork encountered. Individuals within the company have noted that he could make impulsive decisions at times, which contributed to a sense of ambiguity within WeWork.

Many also describe the organizational culture during Neumann's tenure as problematic. The "work hard, party hard" mentality appeared to be pervasive. After all, WeWork was one of the first coworking places to offer free beer to its clients. Furthermore, the company's frequent parties made it an uncomfortable work environment for some employees. The company has also faced allegations of racial discrimination and sexual assault, with some blaming its partying culture for exacerbating these significant ethical lapses.

WeWork's growth appeared to be almost unstoppable. It was on the verge of filing a highly anticipated initial public offering (IPO) but rather abruptly made the unexpected move to postpone this decision in 2019. At the time, the company's losses were close to $2 billion. Potential investors also appeared to be aware and concerned, not only with the company's questionable business model but also with its leadership structure. Not long after, Neumann (WeWork's cofounder and CEO of nine years) stepped down after facing pressure from SoftBank, a Japanese company that invested a significant amount of money in WeWork. The following year, the other cofounder (Miguel McKelvey) left the company as SoftBank began implementing a five-year turnaround plan for WeWork.

The challenges that faced WeWork during Neumann's tenure highlight that the factors contributing to organizational crises do not only affect specific people, like an organization's leadership. Instead, they also concern groups, teams, and the organizations themselves. In this case, Neumann's motivations and decisions likely had a negative impact. Still, the group dynamics and

organizational culture also appeared to play a role in problems at WeWork. The case of WeWork provides an excellent example of the behavioral complexity within organizations that contributes to their survival and success. The effect of behavior in organizations extends beyond individual people, affecting groups, teams, departments, and entire organizations.[1]

The details of WeWork's CEO's rise and fall reflect the increasing complexity and depth of organizational life. The effects of behavior ring through organizations—felt by workers, managers, groups, teams, and sometimes the whole organization. They also highlight several issues of interest to those seeking to understand organizational behavior, including motivation, justice, ethics, structure, culture, personality, and their organizationally relevant outcomes, such as turnover, productivity, and survival. Throughout this text, you will learn how organizational challenges often cut across areas like these, which is why the systematic approach pursued in this text and your course is essential.

Management and *Organizational Behavior*

1-1 Define *organizational behavior (OB)*.

Right now, you might be wondering, "What is organizational behavior, and why does it matter to me?" We will define *organizational behavior (OB)* shortly, but first, let's begin with the end in mind: why OB matters and what the study of OB offers you.

Historically, business school coursework emphasized the technical aspects of management, focusing on economics, accounting, finance, and quantitative techniques. Coursework on human behavior in organizations received relatively less attention. This might be surprising to you because you might be thinking "the people make the place":[2] organizations are only as effective as the people who comprise them, so shouldn't we try to understand people in the workplace as well as how we make decisions, communicate, and interact with one another? Over the past several decades, however, business schools have realized the significant role that interpersonal skills play in determining managers' and employees' effectiveness. This realization led to the birth of OB, which, at its core, focuses on individuals and groups in organizations.

Understanding OB is important to you now more than ever. We are in the midst of an OB revolution of sorts that is gaining traction year by year. As noted in the 2016 Deloitte Global business trends report, organizations have figured out that they need to understand "what makes people join, perform well in, and stay with an organization; who will likely be successful; who will make the best leaders; and what is required to deliver the highest-quality customer service and innovation."[3] A knowledge of OB and interpersonal skills is critical for your success and advancement in the modern workplace. According to Jeff Weiner, executive chair of LinkedIn, "Communications is the No. 1 skills gap across… major cities in the United States."[4] It is also relevant to nearly every job: one study by Monster mined about a million market-wide job postings to determine the most frequently desired skills in applicants.[5] Communication skills were at the top of the list, followed by other OB-relevant skills, including problem-solving and influence skills.

Furthermore, these skills are also necessary for your career advancement. A survey of over 2,100 CFOs across 20 industries indicated that a lack of interpersonal skills is the top reason why some employees fail to advance.[6] Ultimately, OB can equip you with critical tools for success and advancement in the workplace.

In this text, we pay special attention to how the knowledge and practice of OB can help you (1) think analytically and critically, (2) make better decisions, (3) communicate and collaborate more effectively with others, and (4) act with a sense of social responsibility in the workplace. Research has demonstrated that these types of "employability skills" are highly valued and desired by employers. A lack of these skills can lead to problems in the workplace.[7]

Incorporating OB principles into the workplace can also yield many critical organizational outcomes. For one, companies known as good places to work—such as Hilton, UKG, Wegmans, Cisco, Workday, Salesforce, and Edward Jones[8]—have been found to generate superior financial performance due to their attention to OB.[9] Second, developing managers' and employees' interpersonal skills helps organizations attract and keep high-performing employees. This function is vital because outstanding employees are always in short supply and costly to replace.[10] Third, strong associations exist between the quality of workplace relationships and employee job satisfaction, stress, and turnover. One extensive study of hundreds of workplaces and more than 200,000 respondents showed that social relationships among coworkers and supervisors were strongly related to overall job satisfaction. Positive social relationships were also associated with lower stress at work and lower intentions to quit.[11] Additional research suggests that positive work relationships help employees to flourish—leading to improvements in job and life satisfaction, positive emotions at work, perceptions that one's work has meaning, and even performance.[12] Fourth, an emphasis on OB can foster awareness for organizations' environmental, social, and sustainability performance.[13] Accordingly, universities have begun to incorporate social entrepreneurship education into their curriculum to train future leaders in addressing social issues within their organizations.[13] But enough of the *positives*—incorporating OB principles into the workplace can also help us understand how to manage the *negative* aspects and outcomes of work, such as unethical or deviant workplace behavior, violence, stress, discrimination, sexual harassment, conflict, drug abuse, incivility, and theft.[15] Clearly, there are tremendous benefits to understanding people and their behavior within organizations. As such, this text has been written to help managers, potential managers, and employees develop an understanding of human behavior as individuals, members of groups or teams, and workers.

Who's Who in the World of Work

Let's begin by briefly defining the terms *worker, manager,* and *organization*. First, **workers** are people within organizations who get things done. Workers, as individuals, members of work groups, teams, or organizations, contribute to the accomplishment of goals. It may seem unnecessary to define a worker up front, but as the past decade has demonstrated, the nature of work and what it means to be a worker is changing. For instance, today's world of work is much more autonomous and interdependent. It requires a greater variety of skills than work 30 years ago.[16] As we will discuss later in this chapter, the turn of the millennium has led to a new era many refer to as *the gig economy.*[17] Outside a full-time employee's traditional role, nonstandard worker arrangements are much more common in today's day and age, with many people working as *contract workers, independent contractors, freelancers,* or *temporary workers*. Second, the most notable characteristic of **managers** is that they get things done through other people. They make decisions, allocate resources, and direct others' activities to attain goals. Managers are sometimes called *administrators*, especially in nonprofit organizations. They do their work in an **organization**, a consciously coordinated social unit composed of two or more people, that functions on a relatively continuous basis

worker An individual who contributes to the accomplishment of work goals.

manager An individual who achieves goals through other people.

organization A consciously coordinated social unit, composed of two or more people, that functions on a relatively continuous basis to achieve a common goal or set of goals.

to achieve a common goal or set of goals. By this definition, manufacturing and service firms are organizations, and so are schools; hospitals; churches; military units; nonprofits; police departments; and local, state, and federal government agencies.

More than ever, new hires and other employees are placed into management positions without sufficient management training or informed experience.[18] According to a large-scale survey, more than 58 percent of managers reported that they had not received any training, and 25 percent admitted that they were not ready to lead others when they were given the role.[19] In addition to the lack of training and preparation, job demands have increased: The average manager has seven direct reports (having five was once the norm) and spends less time supervising them than managers of the past.[20] Considering that a Gallup poll found organizations chose the wrong candidate for management positions 82 percent of the time,[21] we conclude that the more you can learn about people and how to manage them, the better prepared you will be to be the right management candidate. OB will help you get there.

planning A process that includes defining goals, establishing strategy, and developing plans to coordinate activities.

organizing Determining what tasks are to be done, who is to do them, how the tasks are to be grouped, who reports to whom, and where decisions are to be made.

leading A function that includes motivating employees, directing others, selecting the most effective communication channels, and resolving conflicts.

controlling Monitoring activities to ensure that they are being accomplished as planned and correcting any significant deviations.

Management Activities

The world of work involves an overwhelming number of activities, tasks, and responsibilities. For instance, workers can collect, process, and make sense of data; make decisions; perform physical activities; interact with others; or perform administrative activities.[22] Although workers' activities may also involve interacting and coordinating work with other people, it is usually a much more significant component of managerial jobs. Managers' work can be categorized into four different activities: **planning**, **organizing**, **leading**, and **controlling**. The *planning* function encompasses defining an organization's goals, establishing an overall strategy for achieving those goals, and developing a comprehensive set of plans to integrate and coordinate activities. Evidence indicates the need for planning increases the most as managers move from lower-level to mid-level management.[23]

When managers design their work unit's structure, they are *organizing*. The organizing function includes determining what tasks are to be done, who is to do them, how the tasks are to be grouped, who reports to whom, and where decisions are to be made.

Every organization contains people, and it is management's job to direct and coordinate those people, which is the *leading* function. When managers motivate employees, direct their activities, select the most effective communication channels, or resolve conflicts, they are engaging in leading.

Management must monitor its organization's performance and compare it with previously set goals to ensure that activities are going as they should. If there are any significant deviations, management's job is to get the organization back on track. This monitoring, comparing, and potential correcting is the *controlling* function.

Management Roles

Henry Mintzberg, now a prominent management scholar, undertook a careful study of executives early in his career to determine what they did on their jobs. Based on his observations, Mintzberg concluded that managers perform ten different, highly interrelated roles or sets of behaviors, thus serving a critical function in organizations.[24] As shown in Exhibit 1-1, these ten roles are primarily (1) interpersonal, (2) informational, or (3) decisional. Although much has changed in the world of work since Mintzberg developed this model, research indicates the roles have changed very little.[25]

Exhibit 1-1 Minztberg's Managerial Roles

Role	Description
Interpersonal	
Figurehead	Symbolic head; required to perform a number of routine duties of a legal or social nature
Leader	Responsible for the motivation and direction of employees
Liaison	Maintains a network of outside contacts who provide favors and information
Informational	
Monitor	Receives a wide variety of information; serves as nerve center of internal and external information of the organization
Disseminator	Transmits information received from outsiders or from other employees to members of the organization
Spokesperson	Transmits information to outsiders on organization's plans, policies, actions, and results; serves as expert on organization's industry
Decisional	
Entrepreneur	Searches organization and its environment for opportunities and initiates projects to bring about change
Disturbance handler	Responsible for corrective action when organization faces important, unexpected disturbances
Resource allocator	Makes or approves significant organizational decisions
Negotiator	Responsible for representing the organization at major negotiations

Source: H. Mintzberg, *The Nature of Managerial Work*, 1st ed., © 1973, pp. 92–93. Reprinted and electronically reproduced by permission of Pearson Education, Inc., New York, NY.

Interpersonal Roles All managers must perform duties that are ceremonial and symbolic in nature. For instance, when the president of a college hands out diplomas at commencement or a factory supervisor gives a group of high school students a tour of the plant, they are acting in a figurehead role. Another key interpersonal role all managers have is a leadership role. This role includes hiring, training, motivating, and disciplining employees. The third role within the interpersonal grouping is the liaison role, or contacting and fostering relationships with others who provide valuable information. The sales manager who obtains information from the quality-control manager in their own company has an internal liaison relationship. When that sales manager has contact with other sales executives through a marketing trade association, they have external liaison relationships.

Informational Roles To some degree, all managers collect information from outside organizations and institutions. They typically scan the news media and talk with other people to learn of changes in the public's tastes and what competitors may be planning. Mintzberg called this the *monitor* role. Managers also act as a conduit to transmit information to organizational members. This is the *disseminator* role. Also, managers perform a *spokesperson* role when representing the organization to outsiders.

Decisional Roles Mintzberg identified four roles that require making choices. In the *entrepreneur* role, managers initiate and oversee new projects to improve their organization's performance. As *disturbance handlers*,

managers take corrective action in response to unforeseen problems. As *resource allocators*, managers are responsible for allocating human, physical, and monetary resources. Finally, managers perform a *negotiator* role. In this role, they discuss issues and bargain with other units (internal or external) to gain advantages for their unit.

Management Skills

Another way to consider what managers do is to look at the skills or competencies they need to achieve their goals. Researchers have identified several skills that differentiate effective from ineffective workers and managers.[26] These skills are essential, and all are necessary to become a well-rounded and effective manager.

technical skills The ability to apply specialized knowledge or expertise.

Technical Skills **Technical skills** encompass the ability to apply specialized knowledge or expertise. When you think of the skills of professionals such as civil engineers or oral surgeons, you typically focus on the technical skills they have learned through extensive formal education. Of course, professionals do not have a monopoly on technical skills. Not all technical skills have to be learned in schools or other traditional training programs. All jobs require some specialized expertise, and many people develop their technical skills on the job.

people skills The ability to work with, understand, and motivate other people, both individually and in groups.

People Skills The ability to understand, communicate with, motivate, and support other people, both individually and in groups, defines **people skills**. Many people may be technically proficient but poor listeners, unable to understand others' needs, or weak at managing conflicts. Managers must have good people skills because they need to get things done through other people.

conceptual skills The mental ability to analyze and diagnose complex situations.

Conceptual Skills Managers must have the mental ability to analyze and diagnose complex situations. These tasks require **conceptual skills**. Decision making, for instance, requires managers to identify problems, develop alternative solutions to correct those problems, evaluate those alternative solutions, and select the best one. After they have chosen a course of action, managers must organize a plan of action and then execute it. The abilities to integrate new ideas with existing processes and innovate on the job are also crucial conceptual skills for today's managers.

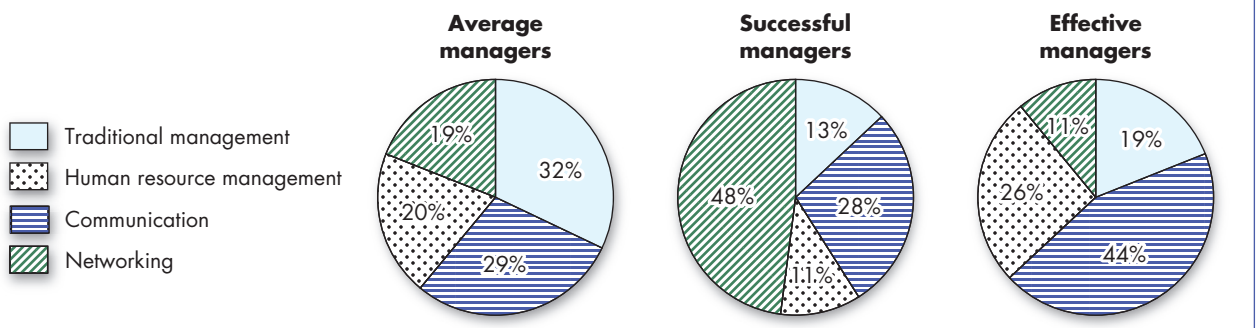
Effective Versus Successful Managerial Activities

What makes one manager more effective than another? To answer this question, Fred Luthans, a prominent OB researcher, and associates looked at what managers do from a somewhat different perspective.[27] They asked, "Do managers who move up most quickly in an organization do the same activities and with the same emphasis as managers who do the best job?" You might think the answer is yes, but that is not always the case.

Luthans and his associates studied more than 450 managers, all engaged in four managerial activities:

1. **Traditional management.** Decision making, planning, and controlling.
2. **Communication.** Exchanging routine information and processing paperwork.
3. **Human resources (HR) management.** Motivating, disciplining, managing conflict, staffing, and training.
4. **Networking.** Socializing, politicking, and interacting with outsiders.

Exhibit 1-2 Allocation of Activities by Time



Source: Based on F. Luthans, R. M. Hodgetts, and S. A. Rosenkrantz, *Real Managers* (Cambridge, MA: Ballinger, 1988).

The "average" manager spent 32 percent of their time in traditional management activities, 29 percent communicating, 20 percent in HR management activities, and 19 percent networking. However, the time and effort that different *individual* managers spent on those activities varied greatly. As shown in Exhibit 1-2, networking made the most considerable contribution among successful managers (defined in time to promotion within their organization). HR management activities made the least relative contribution. Indeed, other studies in Australia, Israel, Italy, Japan, and the United States confirm the link between networking, social relationships, and success within an organization.[28] However, Luthans and associates found that among *effective* managers (defined in terms of quantity and quality of their performance and the satisfaction and commitment of employees), communication made the most considerable contribution and networking the least. The connection between communication and effective managers is also evident. Managers who explain their decisions and seek information from colleagues and employees—even if the information turns out to be negative—are the most effective.[29]

This research offers important insights. *Successful* (in terms of promotion) managers give almost the opposite emphases to traditional management, communication, HR management, and networking as do *effective* managers. This finding challenges the historical assumption that promotions are based on performance. Instead, it illustrates the importance of networking and political skills to getting ahead in organizations.

Organizational Behavior (OB) Defined

Now that we have established the importance of what workers and managers do, we turn our focus more broadly toward how people behave in organizations. **Organizational behavior (OB)** is a field of study investigating the impact that individuals, groups, and structure have on behavior within organizations to apply such knowledge toward improving an organization's effectiveness. That is a mouthful, so let us break it down.

organizational behavior (OB) A field of study that investigates the impact that individuals, groups, and structure have on behavior within organizations for the purpose of applying such knowledge toward improving an organization's effectiveness.

OB is a field of study, meaning that it is a distinct area of expertise with a common body of knowledge. It focuses on three determinants of behavior in organizations: individuals, groups, and structure and applies the knowledge gained about individuals, groups, and the effect of structure on behavior to make organizations work more effectively.

To sum up our definition, OB is the study of what people do in an organization and how their behavior affects the organization's performance. Because



Internet retailer Zappos.com understands how organizational behavior affects an organization's performance. The firm maintains good employee relationships by offering generous benefits, extensive training, and a positive work environment in which employees are encouraged "to create fun and a little weirdness."
Source: Ronda Churchill/Bloomberg/Getty Images

OB is concerned specifically with employment-related situations, it examines behavior in the context of job attitudes, absenteeism, employee turnover, productivity, performance, and management. Although debate exists about the relative importance of each, OB includes these core topics: [30]

- Performance, citizenship, deviance, and creativity
- Diversity and inclusion
- Job attitudes, emotions, and moods
- Personality and individual differences
- Judgment and decision making
- Motivation
- Justice and ethics in organizations
- Groups and teams
- Communication and relationships
- Leadership and management
- Power, politics, and corruption
- Conflict and negotiation
- Organizational theory and structure
- Organizational culture and climate
- Organizational health, stress, and safety

Complementing Intuition with Systematic Study

1-2 Show the value of systematic study to OB.

Whether you have explicitly thought about it before or not, you have been "reading" people almost all your life. You have watched their actions and interpreted what you see or tried to predict what people might do under different conditions. This casual approach to reading others can often lead to erroneous predictions, but using a systematic approach can improve your accuracy. Underlying the systematic approach in this text is the belief that behavior is not random. Instead, we can identify consistencies underlying people's behavior and modify them to reflect individual differences.

These consistencies are fundamental. Why? Because they allow predictability. Behavior is generally predictable, and the **systematic study** of behavior is a way to make reasonably accurate predictions. When we use the term *systematic study*, we mean looking at relationships, attempting to attribute causes and effects, and basing our conclusions on scientific evidence. That is, we base our predictions on data gathered under controlled conditions and measured and interpreted rigorously.

systematic study Looking at relationships, attempting to attribute causes and effects, and drawing conclusions based on scientific evidence.

Evidence-based management (EBM) complements systematic study by basing managerial decisions on the best available scientific evidence.[31] For example, we want doctors to make decisions about patient care based on the latest

evidence-based management (EBM) Basing managerial decisions on the best available scientific evidence.

available evidence. EBM argues that managers should do the same, thinking more scientifically about management problems. For instance, a manager might pose a question, search for the best available evidence, and apply the relevant information to the question or case at hand. You might wonder what manager would not base decisions on evidence. However, the vast majority of management decisions are still made "on the fly," with little to no systematic study of available evidence. Even more worrisome, there is mounting public distrust of scientists and researchers, which often leads managers to ignore evidence and "go with their guts."[32]

But should we trust our guts? Systematic study and EBM add to **intuition**, or those "gut feelings" about what makes others (and ourselves) "tick." Of course, the things you have come to believe in an unsystematic way are not necessarily incorrect. One review of hundreds of studies suggests that data-driven judgments (based on algorithms) were about ten percent more accurate than human's intuitive judgments.[33] Another study found that laypeople may prefer data-driven judgments to judgments made by others (e.g., experts) and even to judgments made by themselves, contrary to conventional wisdom.[34] Jack Welch (former CEO of General Electric) noted, "The trick, of course, is to know when to go with your gut." But if we make *all* decisions with intuition or gut instinct, we are likely working with incomplete information—like making an investment decision with only half the data about the potential for risk and reward. As such, EBM becomes a balancing act in which one critically weighs evidence from multiple sources. These sources include the opinions of professional experts and respected figures, evidence collected from one's own business, and, of course, scientific evidence.[35]

intuition An instinctive feeling not necessarily supported by research.

Relying on intuition is made worse because we tend to overestimate what we think we know. Many managers hold so-called commonsense opinions regarding effective management that have been flatly refuted by empirical evidence. Moreover, managers are often motivated to hold onto these beliefs even in the face of contradictory evidence. They negatively react to this information, especially when it counteracts their beliefs, self-image, self-interest, or identity.[36] We find a similar problem in chasing the business and popular media for management wisdom.[37] The business press tends to be dominated by fads, made worse by their proliferation through social media.[38] As a writer for *The New Yorker* put it, "Every few years, new companies succeed, and they are scrutinized for the underlying truths they might reveal. But often there is no underlying truth; the companies just happened to be in the right place at the right time."[39] Although we try to avoid it, we might also fall into this trap. It is not that the business press stories are all wrong; it is that without a systematic approach, it is difficult to accurately conclude what makes prospering companies successful.

Building on Big Data with Artificial Intelligence

Data has been used to evaluate behavior since at least 1749. On this date, the word *statistic* was coined to mean a "description of the state."[40] Statistics back then were used for governance purposes, but since the data collection methods were clumsy and simplistic, so were the conclusions. Big data—the extensive use of statistical compilation and analysis—did not become possible until computers were sophisticated enough to store and manipulate large amounts of information.[41] Let us look at the roots of big data for business, which originated in online retailers' marketing departments.

Background It is difficult to believe now, but not long ago, companies treated online shopping as a virtual point-of-sale experience. Shoppers browsed websites anonymously, and sellers tracked sales data only on what customers bought. Gradually, online retailers began to track and act on customer preferences

Myth or Science?

Management by Walking Around Is the Most Effective Management

This is mostly a myth, but with a caveat. Management by walking around (MBWA) is an organizational principle made famous with the 1982 publication of *In Search of Excellence* and based on a 1970s initiative by Hewlett-Packard—in other words, it is a dinosaur. Years of research indicate that effective management practices are not built around MBWA. But the idea of requiring managers at all levels of the organization to wander around their departments to observe, converse, and hear from employees continues as a standard business practice.

Many companies expecting managers and executives to do regular "floor time" have claimed benefits from increased employee engagement to deeper management understanding of company issues. A three-year study also suggested that a modified form of MBWA may significantly improve safety in organizations because employees become more mindful of following regulatory procedures when supervisors observe and monitor them frequently.

While MBWA sounds helpful, its limitations suggest that modern practices focused on building trust and relationships are more useful for management. Limitations include available hours, focus, and application.

1. **Available hours.** Managers are charged with planning, organizing, coordinating, and controlling. Yet even CEOs—the managers who should be the most in control of their time—report spending 53 percent of their average 55-hour workweek in time-wasting meetings.
2. **Focus.** MBWA turns management's focus toward the concerns of employees. Such a focus is good, but only to a degree. As noted by Jeff Weiner, chair of LinkedIn, "Part of the key to time management is carving out time to think, as opposed to constantly reacting. And during that thinking time, you're not only thinking strategically, thinking proactively, thinking longer-term, but you're literally thinking about what is urgent versus important." Weiner and other executives argue that meetings distract them from their purpose.
3. **Application.** The principle behind MBWA is that the more managers know their employees, the more effective those managers will be. This principle is not always (or even often) true. As we will learn in the chapter on Perception and Individual Decision Making, knowing something (or thinking we know it) should not always lead us to act on only that information. Our internal decision making is subjective—as such, we need objective data to make the most effective management decisions.

Based on the need for managers to dedicate their efforts to administering and growing businesses and given the proven effectiveness of objective performance measures, it seems the time for MBWA is gone. Yet there is that one caveat: Managers should know their employees well. As Rick Russell, former president of Minerva Neurosciences, says, "Fostering close ties with your lieutenants is the stuff that gets results. You have to rally the troops. You can't do it from a memo." Management should, therefore, not substitute walking around for actual management.[42]

obtained through the Internet shopping experience. This knowledge was far superior to data gathered in simple store transactions. This action enabled them to create more targeted marketing strategies than ever before. The bookselling industry is a case in point. Before online selling, brick-and-mortar bookstores could collect data about book sales only to create projections about consumer interests and trends. With the advent of Amazon, suddenly a vast array of information about consumer preferences became available for tracking. These preferences included what customers bought, what they looked at, how they navigated the site, and what influenced them (such as promotions, reviews, and page presentation). The challenge for Amazon was to identify which statistics were *persistent*, giving relatively constant outcomes over time, and which were *predictive*, showing steady causality between certain inputs and outcomes. The company used these statistics to develop algorithms to forecast which books customers would like to read next. Amazon could then base its wholesale purchase decisions on the feedback customers provided, through both these passive collection methods and solicited recommendations for upcoming titles.

It is good news for the future of business that researchers, the media, and company leaders have identified the potential of data-driven management and decision making. A manager who uses data to define objectives, develop theories of causality, and test those theories can determine which employee activities are relevant to their objectives.[43] Big data is increasingly applied toward managing organizational change and making effective decisions (which we discuss in Chapter 6 on perception and decision making). Managers seem to be reacting well to it. For instance, in one study, managers were given automated, data-driven decision support systems to assist them with their hiring tasks. In this study, managers reported being happier with and more confident in the decisions they made.[44]

Current Usage No matter how many terabytes of data firms collect or from how many sources, the reasons for data analytics are essentially the same. They include *predicting* any event, from a book purchase to a spacesuit malfunction; detecting how much *risk* is incurred at any time, from the risk of a fire to that of a loan default; and *preventing* catastrophes large and small, from a plane crash to an overstock of product.[45] With big data, United States defense contractor BAE Systems protects itself from cyberattacks. San Francisco's Bank of the West uses customer data to create tiered pricing systems. As a final example, London's Graze.com analyzes customers' preferences to select snack samples to send with their orders.[46]

Naturally, big data has been used by technology companies like Google and Facebook, which rely on advertising dollars for revenue and thus need to predict user behavior. Companies like Netflix and Uber similarly use big data to predict where and when customers may want to use their services. Insurance firms predict behavior to assess risks, such as the chance of traffic accidents, to set customer premiums. Even museums like the Solomon R. Guggenheim Museum in New York, the Dallas Museum of Art, and the Minneapolis Institute of Arts analyze data from transmitters, kiosks, and surveys to cater to their paying guests.[47]

Online retailers like eBay and Amazon that market tangible products through online platforms also rely on big data to predict what will sell. For organizations like Nielson, which tracks television and radio watching, the results of data analyses *are* the product they sell. Still other organizations collect big data but do not use it directly. These are often organizations whose primary business is not online. Kroger, a United States grocery store chain, collects electronic information from 55 million customers who have loyalty cards and sells the data to vendors who stock Kroger's shelves.[48] Sometimes technology companies simply sell their data; Twitter sells 500 million tweets a day to four data assimilation companies.[49]

New Trends The use of big data to understand, help, and manage people is relatively new but is "as ubiquitous as the air we breathe."[50] In fact, research on 10,000 workers in China, Germany, India, the United Kingdom, and the United States indicated that transformations in the way work is performed will rely more on technological advancements than on any other factor.[51] Organizations are also beginning to focus on "fast data," emphasizing a consistent influx of actionable data to guide business decisions in real time.[52]

Big data has enabled organizations to acquire and manage large amounts of data and information (sometimes with more variables than people!).[53] Even more recent advancements have shifted toward processing and analyzing all this information.[54] One way organizations have been able to adapt to the massive amounts of data and the sheer speed at which it is acquired is through *artificial intelligence* (AI; i.e., machines programmed to think, work, and react like humans).[55] When you think of AI, your mind may wander to robots, regardless of your status as a *Star Trek* or *Star Wars* fan. We are certainly seeing *robotics* becoming used in the workplace (for example, robots can help hospital night staff remotely assist their patients during night rounds).[56] However, much of

the current focus has been on *machine learning* (i.e., a subset of AI in which software is trained to perform a task while at the same time "learning" and "improving" from incoming data and feedback).[57] Indeed, 60 percent of the billions of dollars invested in AI has been allocated toward machine learning.[58] Machine learning has contributed immensely to many organizations' success, especially those in the e-commerce industry. One estimate suggests that over a third of Amazon transactions stem from AI-facilitated product recommendations.[59] In the coming chapters, we discuss how and in what ways big data and AI approaches have contributed to the study and practice of OB. In the meantime, here are some examples of novel methods researchers and organizations have used to apply big data to study OB:[60]

- Robotics
- Artificial intelligence/machine learning
- Serious games and gamification (i.e., designing games that inherently collect rich data on worker behavior to improve training, hiring, and even worker attitudes)
- "Always on" technology (i.e., devices that are continuously "on" and constantly collect data, such as smartphones and digital assistants)
- Mobile sensors and biometrics (i.e., wearable technology that monitors biometric data, such as sleep quality and heart rate)
- Social media (i.e., data concerning interactions between and among groups of people, including social networking and the formation/dissolution of relationships)
- Text or sentiment analysis (i.e., analyzing the words or phrases people use in electronic communication to determine mood and personality traits)

Limitations As technological capabilities for handling big data and AI have increased, so have privacy issues and appropriate application.[61] This limitation is particularly true when data collection includes surveillance instruments. For instance, an experiment in Brooklyn, New York, was designed to improve residents' quality of life. The researchers collected intensive data from infrared cameras, sensors, and smartphone Wi-Fi signals on these residents.[62] A bank call center and a pharmaceutical company (through similar methods) found that employees were more productive with more social interaction, so they changed their break-time policies so more people took breaks together. They then saw sales increase and turnover decrease. Bread Winners Café in Dallas, Texas, continuously monitors all restaurant employees through surveillance and uses the data to promote or discipline its servers.[63] These big data tactics and others might yield results. For instance, research indicates that surveillance may increase task performance and citizenship behavior (helping behaviors toward others), at least in the short term.[64]

But critics point out that after Frederick Taylor introduced surveillance analytics in 1911 to increase productivity, these techniques were surpassed by Alfred Sloan's greater success, achieved by providing meaningful work to employees.[65] Further, pioneering studies at the Hawthorne Western Electric plant demonstrated the massive role of group dynamics and norms. From these studies, productivity was a function of both whether workers feel management cares about them and the social forces that cause group members to behave in certain ways.[66] In other words, it is less about the direct effect of surveillance on workers but more so a function of the social forces at play.

These issues bring up a larger concern: What do people think about big data when *they* are the data source? Organizations using big data run the risk of offending the very people they are trying to influence: employees and customers. As Alderman Bob Fioretti said about the 65 sensors installed on Chicago's streets, "This type of invasion is a very slippery slope."[67] The use of AI also has its

own privacy and appropriateness issues.[68] Despite traditional concerns regarding the safety and job security threats robots and automation bring to mind,[69] perhaps the most straightforward limitation is that machines can often fail to capture the obvious "big picture" and may ignore their limits.[70] For example, an algorithm may inadvertently include pizza topping preferences in predicting which employees are more likely to steal at work. Research demonstrates that it is crucial for machine learning to be supervised to avoid atheoretical predictions and decision making.[71] AI may also be used to engage in unethical behaviors at work. For example, Facebook banned a large UK car insurance company from mining users' social media information, learning their personality traits, and charging them different premiums based on their personality traits (and predictions for how safely they would drive).[72]

We must keep in mind that big data will always be limited in predicting behavior, curtailing risk, and preventing catastrophes. In contrast to the replicable results we can obtain through big data, human behavior can often be unpredictable and elusive. Otherwise, our decision making would have been taken over by artificial intelligence by now! But that will never be a worthy goal.[73] Management is more than the sum of data. Overall, we do not advise you to throw your intuition out the window. We are also not suggesting you base all your decisions on a machine learning algorithm. In dealing with people, leaders often rely on hunches, and sometimes the outcomes are excellent. At other times, human tendencies get in the way. The prudent use of big data and AI, along with an understanding of human behavioral tendencies, can contribute to sound decision making and ease natural biases. What we *are* advising is to use evidence as much as possible to inform your decisions. That is the promise of OB.

Disciplines That Contribute to OB

1-3 Identify the major behavioral science disciplines that contribute to OB.

OB is an applied behavioral science built on contributions from several behavioral disciplines, mainly psychology and social psychology, sociology, and anthropology. Psychology's contributions have been principally at the individual or micro level of analysis. In contrast, the other disciplines have contributed to our understanding of macro concepts such as group processes and organization. Exhibit 1-3 is an overview of the major contributions of other disciplines to the study of OB. In turn, OB has influenced the working world, specifically HR practices (e.g., work design, training, employee selection, performance appraisal).

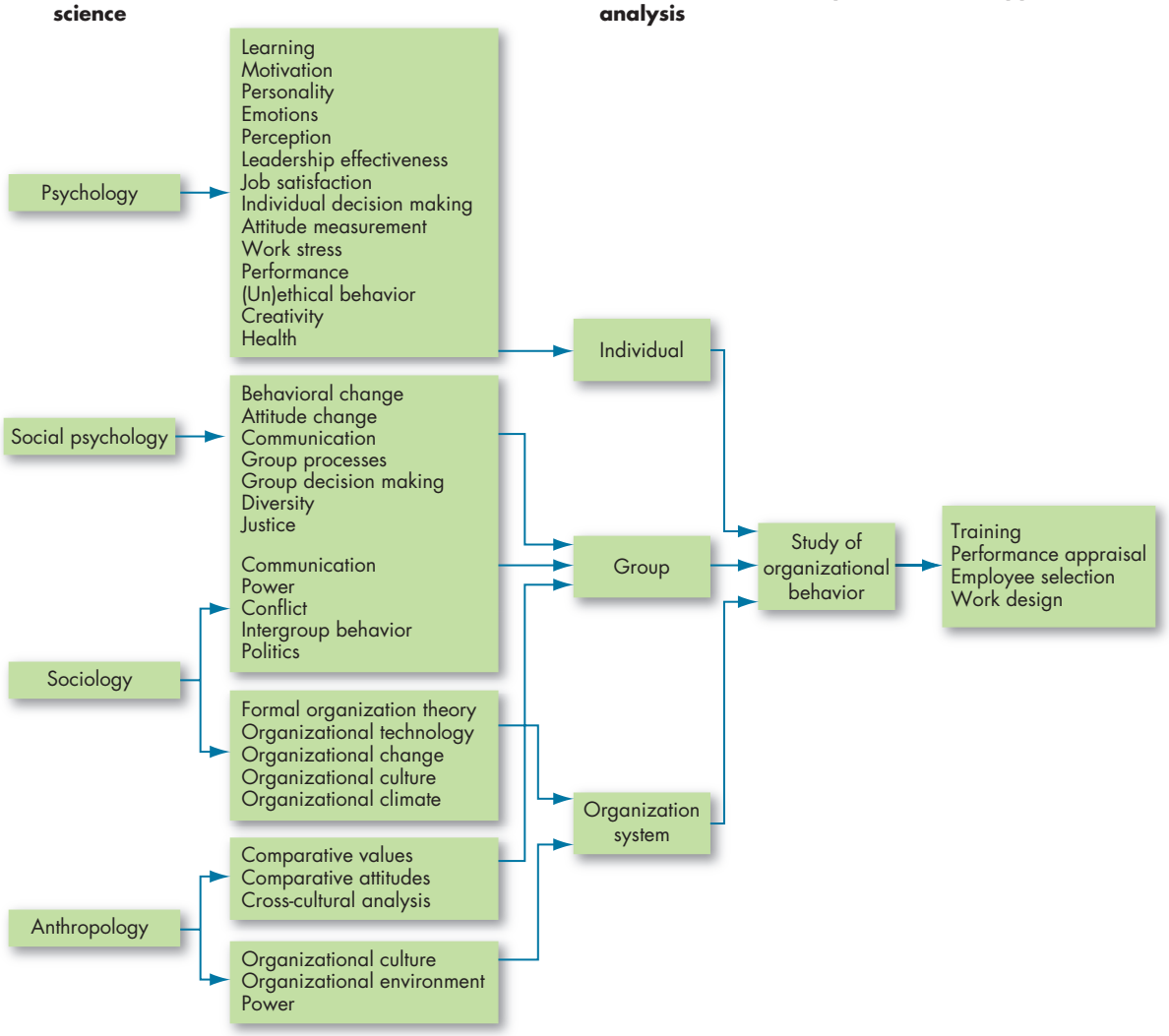
Psychology

psychology The science that seeks to measure, explain, and sometimes change the behavior of humans and other animals.

Psychology seeks to measure, explain, and sometimes change humans and other animals' behavior. Contributors to OB's knowledge are learning theorists; personality theorists; counseling psychologists; and, most important, industrial and organizational psychologists.

Early industrial/organizational psychologists studied fatigue, boredom, and other working conditions that could impede efficient work performance. More recently, their contributions have expanded to include learning, perception, personality, emotions, training, leadership effectiveness, needs, motivational forces, job satisfaction, decision-making processes, performance appraisal, attitude measurement, employee-selection techniques, work design, and job stress. The study of emotions and moods, in particular, has been immensely transformative in the study of OB, leading to an "Affective Revolution." This revolution heavily impacted (and continues to influence) OB research across virtually all of the "contributions" in Exhibit 1-3.[74]

Exhibit 1-3 Toward an OB Discipline



Social Psychology

social psychology An area of psychology that blends concepts from psychology and sociology to focus on the influence of people on one another.

Social psychology, generally considered a branch of psychology, blends concepts from psychology and sociology to focus on people's influence on one another. One central study area is *change*—how to implement it and reduce barriers to its acceptance. Social psychologists also contribute to measuring, understanding, and changing attitudes; identifying communication patterns; and building trust. They have made significant contributions to our study of group behavior, power, and conflict.

Sociology

sociology The study of people in relation to their social environment or culture.

While psychology focuses on the individual, **sociology** studies people in relation to their social environment or culture. Sociologists have contributed to OB by studying group behaviors in organizations, particularly formal and complex organizations. Perhaps most important, sociologists have studied organizational culture, formal organization theory and structure, organizational technology, communications, power, and conflict.

Anthropology

Anthropology is the study of societies to learn about human beings and their activities. Anthropologists' work on cultures and environments has helped us understand differences in fundamental values, attitudes, and behavior among people in different countries and organizations. Much of our current understanding of organizational culture, organizational climate, and differences among national cultures results from anthropologists' work or those using their methods.

anthropology The study of societies to learn about human beings and their activities.

There Are Few Absolutes in OB

1-4 Demonstrate why few absolutes apply to OB.

Laws in the physical sciences—chemistry, astronomy, physics—are consistent and apply in various situations. They allow scientists to generalize about the pull of gravity or be confident about sending astronauts into space to repair satellites. Human beings are complex, and few, if any, simple and universal principles explain organizational behavior. Because we are not alike, our ability to make simple, accurate generalizations about ourselves is limited. Two people often act very differently in the same situation, and the same person's behavior changes in different cases. For example, you may behave much differently during a job interview than you would with your friends on a Saturday morning. Of course, this does not mean that we cannot offer reasonably accurate explanations of human behavior or make valid predictions. It does mean that OB concepts must reflect situational or contingency conditions. We can say *x* leads to *y*, but only under conditions specified in *z*—the **contingency variables**.

contingency variables Situational factors or variables that moderate the relationship between two or more variables.

OB was developed by applying general concepts to a particular situation, person, or group. For example, OB scholars and practitioners would avoid stating that everyone likes complex and challenging work (a *generalization*). Why? Because not everyone wants a challenging job. Some people prefer routine over varied work or simple over complex tasks. A job attractive to one person may not be to another; its appeal is contingent on the person who holds it. Often, we find both general effects and contingencies. For instance, money does have some ability to motivate most of us (a general effect). On the contrary, some of us are more motivated by money than others, and some situations are more about money than others (both contingencies). We will best understand OB when we realize how both general effects and their contingencies guide behavior.

Challenges and Opportunities

1-5 Identify managers' challenges and opportunities in applying OB concepts.

Understanding organizational behavior has never been more critical for managers. Take a quick look at the dramatic changes in organizations. The workforce is becoming increasingly diverse; organizations are continuing to develop a global, integrated presence; technology is revolutionizing how (and where) we do work; managers are increasingly interested in the role that justice and ethics play in the workplace; organizations are beginning to focus on their responsibilities to the environment, societies, and communities—and at the same time developing strengths in workers; and finally, the nature of work itself has been shifting with the advent of the "Gig Economy" and global crises, such as the COVID-19 pandemic.[75]

In short, today's challenges bring opportunities for managers to use OB concepts. In this section, we review some—but not nearly all—of the critical developing issues confronting managers. OB offers solutions to these challenges and opportunities—or at least meaningful insights toward solutions.

Workforce Diversity and Inclusion

With the advent of social movements such as #metoo and Black Lives Matter,[76] organizations, their management and leadership, and workers worldwide are continuing to realize the importance of *workforce diversity* in crafting equitable, inclusive workplaces. One of the most compelling opportunities for organizations is managing **workforce diversity**, which recognizes that the workforce is heterogeneous in its gender identity, age, race, ethnicity, sexual orientation, and other characteristics.[77]

workforce diversity The heterogeneous characteristics of organizations, work groups, and teams that recognize that their workers vary in gender, age, race, ethnicity, sexual orientation, and other characteristics.

Beyond recognizing diversity, all organization members are responsible for doing something about it if a fair, equitable, and productive workplace is to be realized. **Workforce inclusion** focuses on creating and maintaining workplaces that support and leverage their members' diversity.[78] Inclusion compels the workforce and managers to recognize that people are like mosaics, characterized by tiles representing the various identities and value systems that "make them who they are."[79] An inclusive workplace is one in which workers feel that they are involved in critical processes, feel welcomed and valued, and are treated as "insiders."[80]

workforce inclusion The act of creating and maintaining workplaces that support and leverage the diversity of their members.

As an example of diversity and inclusion in action in the modern workplace, longevity and birth rates have changed organizations' dynamics. Global longevity rates have increased by about six years in a very short time (since 2000—the fastest increase since the 1960s),[81] while birth rates have decreased in many developed countries. Together, these trends indicate a lasting shift toward an older workforce. First, OB research can explain what this means for attitudes, organizational culture, leadership, structure, and communication, among other core OB topics. Second, managers and organizations need to think about how best to craft an inclusive workplace for older workers while reducing discrimination and prejudice in their practices.[82]

Socioeconomic shifts also have a profound effect on workforce diversity. Equal access to work and education, regardless of gender identity or sexual orientation, has been deemed a human rights issue by the United Nations (see OB Poll).[83] Despite increasing representation in the workforce, people of various demographic backgrounds (e.g., gender identities and sexual orientations) continue to experience inequality, underrepresentation as managers, prejudice, and even violence.[84] OB researchers study how people from diverse backgrounds fare in the workplace, the unique challenges and benefits they experience, and how their conditions can be improved. This example is just one way cultural and socioeconomic changes affect workforce diversity, and it is one of many. We will discuss how OB can provide insights on workforce issues throughout this text.

Though we have more to say about diversity in the next chapter, we start here by saying that diversity presents promising opportunities and poses challenging questions for managers and employees. How can we recognize the strengths in our diversity? How can we adapt to accommodate each other's differences? What are the legal requirements in each country that protect workplaces from prejudice, discrimination, and inequality? Does workforce diversity lead to positive outcomes for employees and organizations? What can employees, managers, and organizations do to manage diversity effectively? It is vital to address the spoken and unspoken concerns of organizations today.

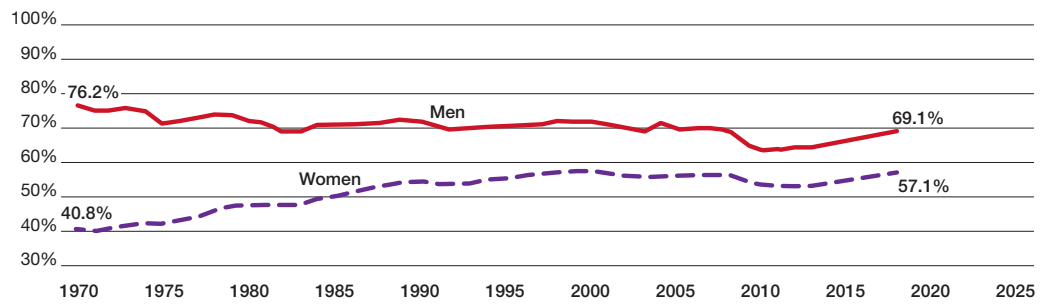
Continuing Globalization

Globalization has led organizations, leaders, and employees to become increasingly connected across the globe, now more than ever.[85] **Globalization** refers to the process in which worldwide integration and interdependence are promoted across national borders. Samsung, the largest South Korean business conglomerate, sells most of its products to organizations in other countries; a Brazilian firm owns Burger King; and McDonald's operates in over one hundred countries

globalization The process in which worldwide integration and interdependence are promoted across national borders.

OB POLL

Percentage of Men and Women Working



Sources: Based on U.S. Bureau of Labor Statistics, "Women in the Labor Force: A Datebook," 2019, https://www.bls.gov/opub/reports/womens-databook/2019/home.htm

on six continents. Although globalization united the international community following the Second World War, the slow recovery from the global financial crisis has caused much of the world's population to be embittered by globalization.[86] In modern times, the world is at a tension point in which societies choose between sectioning off their economies and remaining open to the world, given how globalization can change the employment landscape rapidly for many communities, sometimes resulting in poverty and economic inequality.[87] Meanwhile, we are on the brink of a new Industrial Revolution, disrupting many industries and leaving many without jobs.[88] One of the unique challenges of this tide of globalization is to forge cooperation between organizations and their employees worldwide and pursue the public good with social responsibility in mind.

Furthermore, as a result of globalization, the manager's job has changed. To be effective in the workplace, you should try to anticipate and adapt your approach to the global issues we discuss next.

Increased Expatriate Assignments You are much more likely to find yourself working outside your native country as an **expatriate**. For instance, you might find yourself transferred to your employer's operating division or subsidiary in another country. Once there, you will have to interact with a workforce with very different needs, aspirations, and attitudes than those you are used to back home. To be effective, you will need to understand everything you can about your new location's culture and workforce (i.e., demonstrating your cultural sensitivity). Understanding what leads to success for expatriate assignments is critical to organizations. For instance, one UK consulting firm estimates that the average expatriate assignment costs $311,000 *per year*—a high price to pay when considering that 40 percent of all expatriate assignments end up in failure.[89]

expatriate A person who works outside their native country.

Working With People From Different Cultures Even in your own country, you will find yourself working with people born and raised in different cultures. What motivates you may not motivate them. Or your communication style may be straightforward and blunt, which others may find rude or threatening. To work effectively with people from different cultures, you need to understand how their culture and background have shaped them and how to adapt your management style to accommodate these differences. For instance, managers need to know the workforce's cultural norms in each country where they do business. A large percentage of the workforce enjoys long holidays in some countries. There will be country and local regulations to consider, too. Managers of subsidiaries abroad need to be aware of the unique financial and legal regulations applying to guest

companies or risk violating them. Violations can have implications for operations in that country and political relations between countries. Managers also need to be mindful of differences in regulations for competitors in that country; understanding the laws can often lead to success rather than failure. For example, knowing local banking laws allowed one multinational firm—the Bank of China—to seize a storied (and priceless) London building, Grosvenor House, from the owner, the Indian hotel group Sahara. Management at Sahara contends that the loan default that led to the seizure was a misunderstanding regarding one of its other properties in New York.[90] Globalization can get complicated.

Technology and Social Media

Technology, such as the advancements in AI discussed earlier, has profoundly affected the business world. As another example, many organizations continue to struggle with employees' social media use in the workplace. In February 2015, a Texas pizzeria fired an employee before the first day of work because of an unflattering tweet about the job. In December 2014, Nordstrom fired an Oregon employee who had posted a personal Facebook comment seeming to advocate violence against police officers.[91] These examples show that social media is a complicated issue for today's managers, presenting both a challenge and an opportunity for OB. For instance, should HR investigate a candidate's social media presence? Should a hiring manager read the candidate's Twitter feed or just do a quick perusal of their Facebook profile? How can managers attract applicants and customers through their *own* social media presence?[92] Managers need to adopt evidence-based policies designed to protect employees and their organizations with balance and understanding.

Once employees are on the job, many organizations have policies about accessing social media at work—when, where, and for what purposes. But what about the impact of social media on employee well-being? One recent study found that subjects who woke up in a positive mood and then accessed Facebook frequently found that their mood worsened during the day. Moreover, these subjects also reported decreased satisfaction with their lives.[93] Managers—and the field of OB—are trying to increase employee attitudes and therefore improve and enhance positive organizational outcomes.

On the other hand, some organizations have policies that reinforce an "always-on" culture. The typical employee in the 1960s and 1970s showed up at a specified workplace Monday through Friday and worked for clearly defined eight- or nine-hour chunks of time. That is no longer true for a large segment of today's workforce because the workplace definition has expanded to include anywhere a laptop or smartphone can go. Even if employees work flexible hours or remotely from home (or from half a continent away), managers still need to consider their well-being. One of the biggest challenges to maintaining employee well-being is the new reality that many workers never get away from the virtual workplace. While technology allows many employees to do their work at home or on the beach in Tahiti, it also means that many feel like they are not part of a team. "The sense of belonging is very challenging for virtual workers, who seem to be all alone out in cyberland," said Ellen Raineri of Kaplan University.[94] Another challenge is that organizations are asking employees to put in longer hours. According to one study, one in four employees shows signs of burnout, and two in three report high stress levels and fatigue.[95] These findings may be an underestimate because workers report maintaining "always-on" access for their managers through e-mail and texting. Finally, employee well-being is challenged by heavy outside commitments. For instance, millions of single-parent employees and employees with dependent parents face significant challenges in balancing work and family responsibilities.

As a result of their increased responsibilities in and out of the workplace, employees want jobs that give them flexibility in their work schedules to manage work–life conflicts better.[96] In fact, 56 percent of people in a recent study reported that work–life balance, more than money, recognition, and autonomy, was their definition of career success.[97] Most college and university students say attaining a balance between personal life and work is a primary career goal; they want a life and a job. Organizations that do not help their employees achieve work–life balance will find it increasingly difficult to attract and retain the most capable and motivated individuals. Although a flexible, remote job seemed to be a dream to be attained one day for many workers, the COVID-19 pandemic propelled many workers to work indefinitely in this format. This experience in and of itself has proved to be a massive experiment on a global scale.[98] Given these significant changes, we believe a focus on technologies (e.g., AI, social media, and remote work) will substantially affect OB for years to come. Throughout the text, we will discuss how technology interfaces with each of OB's core topics. As you will see in later chapters, the field of OB offers several suggestions to guide managers to leverage technology effectively.

(Un)ethical Behavior

The corporate world is characterized by cutbacks, expectations of increasing productivity, and tough competition. It is not surprising that many employees feel pressured to cut corners, break the rules, and engage in other questionable practices. They increasingly face **ethical dilemmas and ethical choices** in which they are required to identify right and wrong conduct. Should they "blow the whistle" if they uncover illegal activities in their company? Do they follow orders with which they do not personally agree? Do they "play politics" to advance their careers?

ethical dilemmas and ethical choices Situations in which individuals are required to define right and wrong conduct.

How workers, managers, and people react to these ethical dilemmas and ethical choices results in **(un)ethical behavior**. Unethical behavior is any action that violates widely accepted moral norms (e.g., lying, cheating, stealing, harming others). In contrast, ethical behavior meets or exceeds widely accepted moral norms (e.g., following the rules, going above self-interest to help others).[99] Most of the time, unethical behavior negatively affects workers' and managers' performance and withdrawal behaviors, teams' performance, and organizations' productivity (see the next section for these variables defined and described as outcomes). Furthermore, as we discuss in the chapter on job attitudes, these behaviors can often be referred to as *counterproductive work behaviors* (CWB) that actively damage the organization. However, it is essential to state that *not all unethical behaviors are counterproductive.*[100] For instance, entrepreneurs may lie to potential clients about their production capacity to earn their business (i.e., a *legitimacy lie*)[101]—an action that would *help* their organization. Regardless of their utility, lying is still immoral and classified as unethical behavior. These nuances highlight the complexity of ethics in organizations and warrant their continued study and understanding as a student of OB.

(un)ethical behavior Any actions that violate widely accepted moral norms. Conversely, ethical behaviors are any actions that meet or exceed widely accepted moral norms.

As suggested earlier, what constitutes good, ethical behavior has never been clearly defined. The line differentiating right from wrong is blurry. We see people all around us engaging in unethical practices: elected officials pad expense accounts or take bribes; corporate executives inflate profits to cash in lucrative stock options; and university administrators look the other way when winning coaches encourage scholarship athletes to take easy courses or even, in the case of the University of North Carolina–Chapel Hill, sham courses with fake grades.[102] When people are caught, we see them give excuses such as "everyone does it" or "you have to seize every advantage."

Today's manager must create an ethical culture and climate for employees to do their work productively with minimal ambiguity about right and wrong

behaviors. Companies that promote a strong ethical mission, encourage employees to behave with integrity, and provide strong leadership can influence employees to behave ethically.[103] Companies that promote justice in how rewards and resources are allocated (i.e., the equal treatment of all), how procedures are defined, how people are treated, and how information is distributed can help improve worker perceptions of fairness.[104] Ethics training has also proven helpful in maintaining a higher level of awareness of the implications of ethical choices, as long as the training sessions are given on an ongoing basis.[105] In upcoming chapters, we will discuss the actions managers can take to create ethical cultures, climates, and structures as well as provide practical guidance to help workers make sense of ethically charged situations.

Corporate Social Responsibility (CSR)

corporate social responsibility (CSR) An organization's self-regulated actions to benefit society or the environment beyond what is required by law.

Would you be as happy to work for an organization with a stated social welfare mission as one without? An organization's commitment to **corporate social responsibility (CSR)**, or its self-regulated actions to benefit society or the environment beyond what is required by law, has become increasingly important in the working world. Organizations practice CSR in several ways, including environmental sustainability initiatives, nonprofit work, volunteering, charitable giving, and even more traditional HR practices such as sustainability training and development.[106]

CSR is good for the planet and good for people. Research suggests that CSR positively affects worker attitudes, turnover intentions, and performance. CSR has an even larger effect on discretionary behaviors such as organizational citizenship behavior (OCB) and deviance (discussed later in this chapter).[107] In fact, of 59 large and small organizations surveyed, 86 percent reported they have happier employees because of their CSR programs.[108] Workers respond well to CSR for several reasons. CSR can lead workers to identify more strongly with their organizations, experience a sense of meaningfulness for giving back, feel as if they belong to something greater than themselves, or even fulfill more egoistic needs (engaging in CSR to advance one's agenda).[109] CSR is also good for business. One meta-analysis across 42 studies found that CSR efforts predict organizations' financial performance.[110]

Although CSR's influence is increasing year after year, not all employees find value in it.[111] Therefore, organizations need to address a few issues to be most effective. First, not all projects are equally meaningful for every person, yet all employees' participation is sometimes expected. For instance, Lisa Dewey, a partner at one of the world's largest law firms, said, "All DLA Piper attorneys and staff are encouraged to participate in the firm's pro bono and volunteer projects."[112] Second, some organizations require employees to contribute in a prescribed manner. For instance, consulting firm SHIFT's co-founder and CEO, Joe Mechlinksi, requires employees to participate in "Give Back Days" by serving in a soup kitchen, building a Habitat for Humanity house, or mentoring children. These choices may not fit every individual's vision of CSR. Pressuring people to go "above and beyond" in ways that are not natural for them can burn them out for future CSR projects,[113] particularly when CSR projects directly benefit the organization (such as positive press coverage).[114] People want CSR to be genuine and authentic. Third, CSR measures can seem disconnected from the employee's actual work.[115] After watching consulting firm KPMG's "over the top" video that boasted of involvement in Nelson Mandela's election and the end of apartheid, the launch of the first space station by NASA, and the freedom of United States hostages in Iran, one anonymous employee questioned their employment. "If I want to really make a change," they said, "why would I sit here?"[116]

Regardless, "the next generation of employees is seeking out employers that are focused on the triple bottom line: people, planet, and revenue," said Susan Cooney, founder of philanthropy firm Givelocity.[117] CSR allows workers to serve a higher purpose or contribute to a mission. However, an organization's CSR efforts must be well governed, and its initiatives must be sustainable for long-term benefits.[118] In sum, CSR is a needed, positive trend of accountability and serving. It has also become a significant part of organizational life. Throughout the text, we highlight the intersection between CSR and several core OB topics in both the text and our new feature, "Toward a Better World."

Toward a Better World

Ben & Jerry's: The Scoop on What It Takes to Be a CSR-Oriented Company

Ben & Jerry's, an ice cream maker headquartered in Vermont, is often touted as the poster child for corporate social responsibility (CSR). From humble beginnings, Ben & Jerry's has a storied history of making unique, chunky ice cream flavors, churning out immense profits on just about a yearly basis, and eventually being acquired by a major corporation. But despite all these changes throughout the company's history, their commitment to a triple bottom line has been unwavering. Ben & Jerry's continues to focus on making excellent ice cream, encouraging sustainable growth, and "making the world a better place."

To this aim, the company is committed to ethical sourcing and purchasing, manufacturing processes that reduce its impact on the environment, and giving back to the local community through philanthropy and service. Further, Ben & Jerry's is not milquetoast (that would probably be a terrible ice cream flavor, we think) when it comes to standing up for issues important to them. In fact, an entire page on their website is dedicated to the issues that are important to the company (including their support of the Black Lives Matter movement in 2020), along with the ice cream flavors they have used to raise money and awareness for those issues. Their annual Social & Environmental Assessment Report (SEAR) documents their progress toward making the world a better place. In 2019, for instance, they eliminated 245,000 pounds of plastic packaging, straws, and spoons.

However, Ben & Jerry's has not gone without critique. The pretty picture of what it takes to be a CSR-oriented company often focuses on the successes, but rarely do we see the failures. For instance, in the 1990s, one researcher uncovered actions with good intentions gone wrong. As some examples, many have taken issue with the price of the ice cream as too high or with the excessive fat and sugar content packed into each pint. Furthermore, Ben & Jerry's efforts to ethically source nuts in the Western Amazon resulted in a supply shortage. The company was forced to source from less-than-reputable suppliers as a result. Finally, in the 1990s, Ben & Jerry's partnered with a bakery in New Jersey that employed recovering drug addicts and alcoholics. After forging a partnership (and the bakery owner investing hundreds of thousands in scaling to meet anticipated demand), the collaborative ice cream flavor's sales were too low and not viable, forcing the company to cut ties with the bakery.

Despite these failures and successes, Ben & Jerry's stays committed to its triple bottom line, even when the public closely scrutinized Unilever's acquisition of Ben & Jerry's in 2000. This acquisition has been the subject of many research studies by OB scientists. For instance, one study focused on CEO letters and interviews with long-tenured employees and newcomers to Ben & Jerry's over a 30-year span. It found that, following the acquisition, employees had to "whipsaw" back and forth between the triple bottom line and the financial performance desired by the post-acquisition CEOs. Further, another research study found that the acquiring organization (Unilever) may have been influenced more by Ben & Jerry's than the other way around—adopting and promoting CSR practices. Many consider the threat of acquisition (in terms of erasing or modifying the company's original mission) to be a compelling reason for a company's leadership to consider becoming Certified B Corporations. Like Cabot, New Belgium Brewing, and Patagonia, these corporations are legally required to balance their mission and profit—to evaluate their effect on their people, the community, and the environment. Indeed, Ben & Jerry's followed suit and became a B-Corp in 2012.

In short, the case of Ben & Jerry's personifies the pursuits, the successes, and the struggles of being a CSR-oriented company in the twenty-first century. Although things are not always as easy as eating ice cream, organizations can still take a stand for what they value and put these values into action—and can do so with success.[119]

Positive Work Environments

positive organizational scholarship An area of OB research that studies how organizations develop human strengths, foster vitality, build resilience, and unlock potential.

Positive organizational scholarship (also called positive organizational behavior) has been a real area for growth in OB. It explores how organizations develop human strengths, foster vitality, build resilience, and unlock potential.[120] Researchers in this area say too many OB research and management practices try to identify what is wrong with organizations and their employees. In response, they try to study what is *good* about them.[121] Some key topics in positive OB research are engagement, hope, optimism, and resilience in the face of strain. Researchers hope to help practitioners create positive work environments for employees.

Although positive organizational scholarship does not deny the value of the negative (such as critical feedback), it does challenge us to look at OB through a new lens, pushing organizations to develop employees' strengths rather than dwell on their limitations. One aspect of an organization's positive work environment is its culture, discussed in depth in a later chapter on the topic. Organizational culture influences employee behavior so strongly that organizations have begun to employ culture officers to shape and preserve their personality.[122]

The Gig Economy

As noted earlier in the chapter, today we find ourselves amid the *Gig Economy*, a new era of work in which many people work independently and autonomously ("a company of one") instead of the highly structured employer–employee relations of the past.[123] Today, about one-fifth of United States workers work independently as gig workers.[124] Further, data from the Rand-Princeton Contingent Worker survey suggests that these instances of "gig employment" increased by 5.7 percent over the decade 2005–2015. Astoundingly, *almost all* of the employment growth observed during that decade was attributable to gig work.[125] This transformation in the world of work has led to several changes in the worker experience, such as financial instability, job insecurity, autonomy, career path uncertainty, the transience of work, and physical and relational separation.[126] These changes have led to many challenges for gig workers. They navigate a new world where they come to grips with their emotions, identity, and relationships; struggle to structure work to stay in business; and compete to remain viable.[127]

Exhibit 1-4 details some of the characteristics of employment in the Gig Economy, the new world of work. Under each heading in this exhibit, you will find a grouping of options that may combine to characterize jobs. For instance, you may find yourself employed full-time in an office in a localized, nonunion setting with a salary and bonus compensation package at one point in your career. In contrast, at another point, you find yourself in a flexible, virtual position, choosing to work from overseas for a combination of salary and extra paid time off.

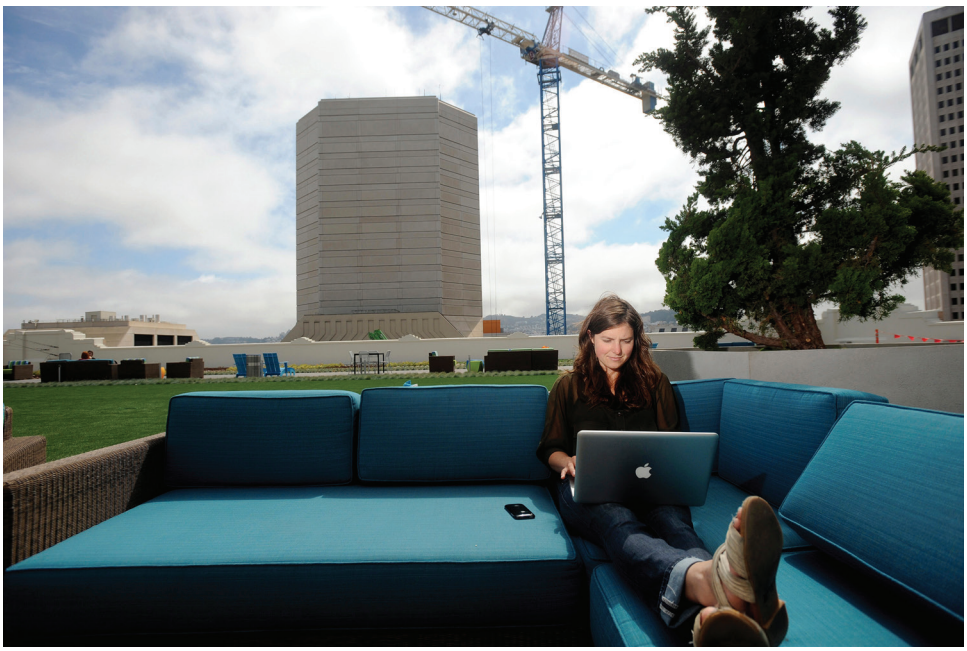
What led to the emergence of the Gig Economy? Although the 2008 global recession ended years ago, some trends from those years may have been responsible. Some people who had long been unemployed left the workforce altogether.[128] At the same time, others have cobbled together several part-time jobs[129] or pivoted to on-demand work.[130] Other researchers point to more distal sources: the dissipation of permanent employment following the Great Depression, layoffs of blue-collar workers in the 1970s, or the mass outsourcing of jobs in the 1980s and 1990s stemming from globalization.[131] Since then, some younger, educated workers have opted to embrace the entrepreneurial spirit and start their own companies, many of which have flourished in their own right.[132] Others have entered the Gig Economy after falling into the "in-between"—the spaces betwixt organizations, work roles, and career paths

Exhibit 1-4 Employment Characteristics in the Gig Economy

Categories of Employment	Types of Employment	Places of Employment	Conditions of Employment	Compensation for Employment
Employed	Full-time	Anchored (office/cubicle)	Local	Salary
Underemployed/ underutilized	Part-time	Floating (shared space)	Expatriate	Hourly
Re-employed	Flextime	Virtual	Short-term assignee	Overtime
Unemployed/jobless	Job share	Flexible	Flexpatriate	Bonus
Entrepreneur	Contingent	Work from home	International business traveler	Contract
Retired	Independent contractor		Visa employee	Time off
Job seeking	Temporary		Union/nonunion employee	Benefits
Furloughed	Reduced hours			
Laid off	Intern			

Sources: Based on J. R. Anderson, E. Binney, N. M. Davis, G. Kraft, S. Miller, T. Minton-Eversole,… and A. Wright, "Action Items: 42 Trends Affecting Benefits, Compensation, Training, Staffing and Technology," *HR Magazine* (January 2013): 33; M. Dewhurst, B. Hancock, and D. Ellsworth, "Redesigning Knowledge Work," *Harvard Business Review* (January–February 2013): 58–64; E. Frauenheim, "Creating a New Contingent Culture," *Workforce Management* (August 2012): 34–39; N. Koeppen, "State Job Aid Takes Pressure off Germany," *The Wall Street Journal*, February 1, 2013, A8; and M. A. Shaffer, M. L. Kraimer, Y.-P. Chen, and M. C. Bolino, "Choices, Challenges, and Career Consequences of Global Work Experiences: A Review and Future Agenda," *Journal of Management* (July 2012): 1282–27.

resulting from a century's worth of watershed employment crises (e.g., the Great Depression, the Great Recession, COVID-19).[133] As OB students, we can investigate how gig workers navigate the new economy, how their contributions and employment affect organizational outcomes, and what the world can do to address the unique challenges that gig workers face.



Twitter employees rave about their company's culture, which creates a positive work environment where smart and friendly colleagues learn; share values, ideas, and information; and work together to help the company grow and succeed. At Twitter's San Francisco headquarters, employees like Jenna Sampson, community relations manager, enjoy free meals, yoga classes, and a rooftop garden.
Source: Noah Berger/Reuters

OB During Crises

When the United States economy plunged into a deep and prolonged recession in 2008, virtually all other large economies worldwide followed suit. Layoffs and job losses were widespread, and those who survived the ax were often asked to accept pay cuts. When times are bad, as they were during the recession, managers are on the frontlines with employees. They face difficult decisions in which they ask employees to make do with less (or to resign from their jobs), and these employees are already saddled with worry about their futures. The difference between good and bad management can be the difference between profit and loss or ultimately between business survival and failure. Managing employees well when times are tough is just as hard as when times are good, if not harder. In good times, understanding how to reward, satisfy, and retain employees is at a premium. In bad times, issues like stress, decision making, and coping come to the forefront.

Today, the COVID-19 pandemic has once again highlighted the role that workers, managers, and organizations play during times of crisis. The question does not merely concern "what happens" during a crisis but, more importantly, how can knowledge about workplace behavior inform our decision-making during crises. The pandemic has vaulted the globe into a new state of crisis, and there are implications for virtually every core topic in OB.[134] Research has examined the most apparent effects of the crisis (i.e., COVID-19's impact on remote work, work–family conflict, and health and safety climates)[135] to its subtler effects (i.e., COVID-19's impact on worker "sudden hero" status and even the implications of pet ownership for isolated remote workers).[136] Throughout the text, we highlight how OB has helped contribute to our understanding of the working world in times of crisis. We also describe how workers and managers can leverage what we know to make the workplace a better place when times get tough.

Coming Attractions: Developing an OB Model

1-6 Compare the three levels of analysis in this text's OB model.

We conclude this chapter by presenting a general model that defines the field of OB and stakes out its parameters, concepts, and relationships. By studying the model, you will have a good picture of how the topics in this text can inform your approach to management issues and opportunities.

An Overview

model An abstraction of reality, a simplified representation of some real-world phenomenon.

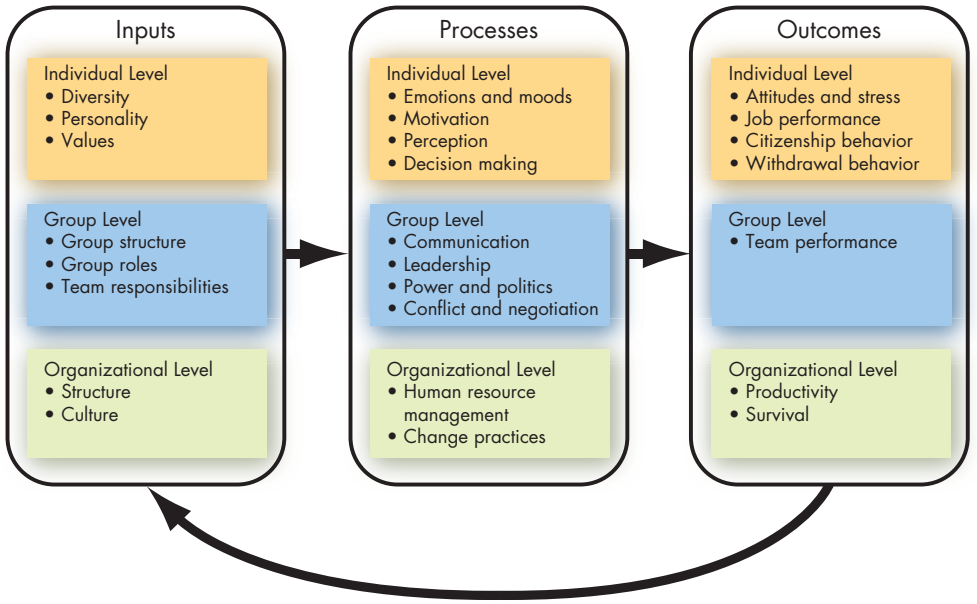
A **model** is an abstraction of reality, a simplified representation of some real-world phenomenon. Exhibit 1-5 presents the skeleton of our OB model. It proposes three types of variables (inputs, processes, and outcomes) at three levels of analysis (individual, group, and organizational). In the chapters to follow, we will proceed from the individual level (Chapters 2 through 8) to group behavior (Chapters 9 through 14) to the organizational system (Chapters 15 through 18). The model illustrates that inputs lead to processes, which lead to outcomes; we will discuss these interrelationships at each level of analysis. Notice that the model also shows that outcomes can influence inputs in the future, highlighting the broad-reaching effect that OB initiatives can have on an organization's future.

Inputs

inputs Variables like personality, group structure, and organizational culture that lead to processes.

Inputs are variables like personality, group structure, and organizational culture that lead to processes. These variables set the stage for what will occur in an organization later. Many are determined in advance of the employment

Exhibit 1-5 A Basic OB Model



relationship. For example, individual characteristics, personality, and values are shaped by a combination of an individual's genetic inheritance and childhood environment. Group structure, roles, and team responsibilities are typically assigned immediately before or after a group is formed. Organizational structure and culture are usually the results of years of development and change as the organization adapts to its environment and builds up customs and norms.

Processes

If inputs are like the nouns in OB, processes are like the verbs. **Processes** are actions that individuals, groups, and organizations engage in as a result of inputs and that lead to certain outcomes. At the individual level, processes include emotions and moods, motivation, perception, and decision making. At the group level, they include communication, leadership, power and politics, and conflict and negotiation. At the organizational level, processes include HR management and change practices.

processes Actions that individuals, groups, and organizations engage in as a result of inputs and that lead to certain outcomes.

Outcomes

Outcomes are the key variables that you want to explain or predict and that are affected by other variables. What are the primary outcomes in OB? Scholars have emphasized individual-level outcomes, such as attitudes and stress, task performance, citizenship behavior, and withdrawal behavior. At the group level, cohesion and functioning are the dependent variables. At the organizational level, we look at overall productivity and survival. Because these outcomes will be covered in all the chapters, we will briefly discuss each here so you can understand the goal of OB.

outcomes Key factors that are affected by other variables.

Attitudes and Stress Employee attitudes are the evaluations that employees make, ranging from positive to negative, about objects, people, or events. For example, the statement "My job is great" is a positive job attitude, and "My job is boring and tedious" is a negative job attitude. **Stress** is a psychological process that occurs in response to environmental pressures.

stress A psychological process that occurs in response to environmental pressures.

Some people might think influencing employee attitudes and stress is purely soft stuff, but as you will learn, attitudes often have behavioral consequences that relate directly to how well you do your job. The belief that satisfied employees are more productive than dissatisfied employees has been a fundamental tenet among managers for years, though only now has research begun to support it.[137] Ample evidence shows that employees who are more satisfied and treated fairly are more willing to engage in the above-and-beyond citizenship behavior so vital in the contemporary business environment.[138]

job performance The total value of a workers' contributions to an organization through their behaviors over a period of time.

Job Performance The total value of your contributions to an organization through your behaviors reflects your level of **job performance** over a period of time.[139] For example, an employee at a sub shop during a typical workday shows up on time, clocks in using the appropriate procedures, cleans and disinfects surfaces, makes and toasts made-to-order sandwiches, resolves customer complaints, and completes all closing activities to ensure the ingredients stay fresh. These behaviors provide value to an organization during a typical workday.

A significant component of one's job performance is *task performance,* or how well a worker accomplishes the specific tasks that comprise their job or their responsibilities to the organization that employs them.[140] If we think about the job of a factory worker, task performance could be measured by the number and quality of products produced in an hour. The task performance of a teacher could be the level of education that students obtain. The task performance of consultants might be the timeliness and quality of the client's presentations.

All these types of performance relate to a job's core duties and responsibilities. They are often directly related to the functions listed on a formal job description. However, job performance goes beyond merely completing core tasks—it can also involve effectively communicating with others; demonstrating initiative, effort, and persistence; and leading or facilitating your teammates' performance, as either a formal supervisor or an informal teammate.[141] Obviously, job performance is the most essential human output contributing to organizational effectiveness. In every chapter, we devote considerable time to detailing how task performance is affected by the topic in question.

organizational citizenship behavior (OCB) Discretionary behavior that contributes to the psychological and social environment of the workplace.

Organizational Citizenship Behavior (OCB) The discretionary behavior that is not part of an employee's formal job requirements and contributes to the workplace's psychological and social environment is called **organizational citizenship behavior (OCB)**, or simply citizenship behavior. Successful organizations have employees who do more than their usual job duties—who provide performance *beyond* expectations. In today's dynamic workplace, where tasks are increasingly performed by teams and where flexibility is critical, employees who engage in good citizenship behaviors help others on their team, volunteer for extra work, avoid unnecessary conflicts, respect the spirit as well as the letter of rules and regulations, and gracefully tolerate occasional work-related impositions and nuisances.

Organizations want and need employees who will do things that are not in any job description. Evidence indicates organizations that have such employees outperform those that do not.[142] As a result, OB is concerned with citizenship behavior as an outcome variable.

withdrawal behavior The set of actions employees take to separate themselves from the organization.

Withdrawal Behavior We have already mentioned behavior that goes above and beyond task requirements, but what about behavior that in some way is below task requirements? **Withdrawal behavior** is the set of actions that employees take to separate themselves from the organization. There are many forms of withdrawal, ranging from showing up late or failing to attend meetings to



Employees working together as a team. Successful team performance depends on team inputs and processes. Team inputs include clearly establishing group structure, group roles, and team responsibilities. Team processes include effective leadership and communication, successful navigation of power and political issues, and the constructive handling of conflict.

Source: Michael Peuckert/Alamy Stock Photo

absenteeism and turnover. Some of these may also be classified as unethical behaviors (discussed earlier in the chapter). As some examples, purposely showing up late to meetings and shirking your responsibilities because you do not feel like working (even though you have a responsibility to your employer to act according to your contract or work agreement) are unethical.

Employee withdrawal can have a very negative effect on an organization. The cost of employee turnover alone has been estimated to run into the thousands of dollars, even for entry-level positions. Consider for a moment that the annual turnover rate was 26.3 percent and the cost of replacing each employee ranged from one-half to two-times their salary in 2017. As such, the average cost to a one-hundred-person organization for a $50,000 salary worker could range from $660,000 to $2.6 million in 2017.[143] Absenteeism also costs organizations significant amounts of money and time every year. For instance, a recent survey found the average direct cost to United States employers of unscheduled absences is 6.7 percent of payroll.[144] Research also suggests that productivity losses linked to absenteeism translate to $225.8 billion for employers (roughly $1,685 per employee).[145]

It is difficult for an organization to operate smoothly and attain its objectives if employees fail to report to their jobs. The workflow is disrupted, and important decisions may be delayed. In organizations that rely heavily on assembly-line production, absenteeism can drastically reduce output quality or even shut down the facility. Levels of absenteeism beyond the normal range directly impact any organization's effectiveness and efficiency. A high turnover rate can also disrupt an organization's efficiency when knowledgeable and experienced personnel leave and replacements must be found. Research indicates that, in general, turnover is significantly harmful to organizational performance.[146]

All organizations have some turnover, of course. Turnover varies significantly by country and, in part, reflects the economy of that country. In 2019, turnover was at an all-time high since 2001, increasing from 66.2 million in 2018 to 67.9 million in 2019.[147] Of course, this was before COVID-19, which affected the state of turnover in the United States, with voluntary separations decreasing and involuntary separations increasing during that period.[148] Returning to 2019, were the turnover levels that year good or bad? To answer that question, we

need to know why there is turnover. Turnover includes voluntary terminations by the employee (quitting), involuntary terminations by the employer without cause (layoffs and discharges), and other separations, including involuntary terminations with cause (firing). A substantial degree of turnover in 2019 was voluntary—42.1 million of the 67.9 million (roughly 62 percent)—also a record high since 2001.[149] Therefore, a staggering two-thirds of turnover that year was due to employees voluntarily quitting their jobs.

While high turnover often impairs an organization's ability to achieve its goals, quitting is not all bad. United States former Federal Reserve Chairwoman Janet Yellen has discussed the positive aspects of turnover for the economy: People quit because they are optimistic about their outside prospects.[150] If the "right" people are leaving—the poorer performers—quits can be positive for an organization. They can create opportunities to replace underperforming individuals with those higher in skill or motivation, open up increased opportunities for promotions, and bring new and fresh ideas to the organization. In today's changing world of work, reasonable employee-initiated turnover levels improve organizational flexibility and employee independence. They can also lessen the need for management-initiated layoffs. While it is appropriate to conclude that high turnover often indicates high employee withdrawal (and thus hurts organizational performance), zero turnover is not necessarily the goal. It is also crucial for organizations to assess which employees are leaving and why.

So why do employees withdraw from work through counterproductive behaviors or quitting? As we will show later in the text, reasons include negative job attitudes, emotions, moods, and negative interactions with coworkers and supervisors.

team performance The quantity and quality of a team's work output.

Team Performance Although many outcomes in our model can be thought of as involving individuals, some relate to the way groups and teams operate. **Team performance** refers to the quantity and quality of a team's work output. Similar to how a sports team's performance is more than the sum of individual players' performance, group functioning in work organizations is more than the sum of individual task performances.

What does it mean to say that a team is performing effectively? In some organizations, an effective team stays focused on a core task and achieves its ends as specified. Other organizations look for teams that can work together collaboratively to provide excellent customer service. Still others put more of a premium on creativity and the flexibility to adapt to changing situations. In each case, different activities will be required to get the most from the team.

productivity The combination of the effectiveness and efficiency of an organization.

effectiveness The degree to which an organization meets the needs of its clientele or customers.

efficiency The degree to which an organization can achieve its ends at a low cost.

Productivity The highest level of analysis in OB is the organization. An organization is productive if it achieves its goals by transforming inputs into outputs at the lowest cost. Thus, **productivity** requires both **effectiveness** and **efficiency**.

A hospital is *effective* when it meets the needs of its clientele successfully. It is *efficient* when it can do so at a low cost. If a hospital manages to achieve higher output from its present staff by reducing the average number of days a patient is confined to a bed or increasing the number of staff–patient contacts per day, we say the hospital has gained productive efficiency. A business firm is effective when it attains its sales or market share goals, but its productivity also depends on achieving those goals efficiently. Popular organizational efficiency measures include return on investment, profit per dollar of sales, and output per hour of labor.

Organizations in the service industry must include customer needs and requirements in assessing their effectiveness. Why? Because a direct chain of cause and effect runs from employee attitudes and behavior to customer attitudes and profitability. For example, a recent study of over 50,000 online

An Ethical Choice

What Should You Do If Your Values Do Not Align with Your Company's?

So, you find yourself at work listening to your coworkers expressing values and beliefs radically different from your own. You decide not to say anything and sometimes even pretend you agree with their opinions. Although you are suppressing your thoughts, you have learned that it is best to leave your personal views outside the office. You would rather not risk your coworkers viewing you differently or, worse, jeopardizing your position.

The risk of potentially losing your job or being demoted may seem to outweigh the discomfort of concealing your actual values and beliefs. However, merely hiding or suppressing your values and opinions does not make them go away. Research indicates that inauthentically conforming to organizational values (i.e., a "facade of conformity") can impact a worker's attachment to their organization in the long run. Ultimately, job insecurity (a concern that one may be vulnerable to losing their job common during organizational crises) worsens the situation. During crises, workers are more likely to feign agreement with their coworkers and the values established by their organizations—even when they do not align with their own. In particular, young workers are more prone to these "facades of conformity" when faced with job insecurity.

Furthermore, research signals that inauthenticity in the workplace can lead individuals to engage in more unethical behavior than when individuals have greater identity integration. Value incongruence is positively related to ego depletion, or the loss of self-control, which ultimately harms work performance or leads to unethical behavior. Compatibility between one's professional and nonprofessional identities allows employees to bring their whole selves to work, benefiting organizations by reducing the risk of unethical behavior.

Here are some recommendations if you find yourself in a situation where your values are incongruent with your employer's:

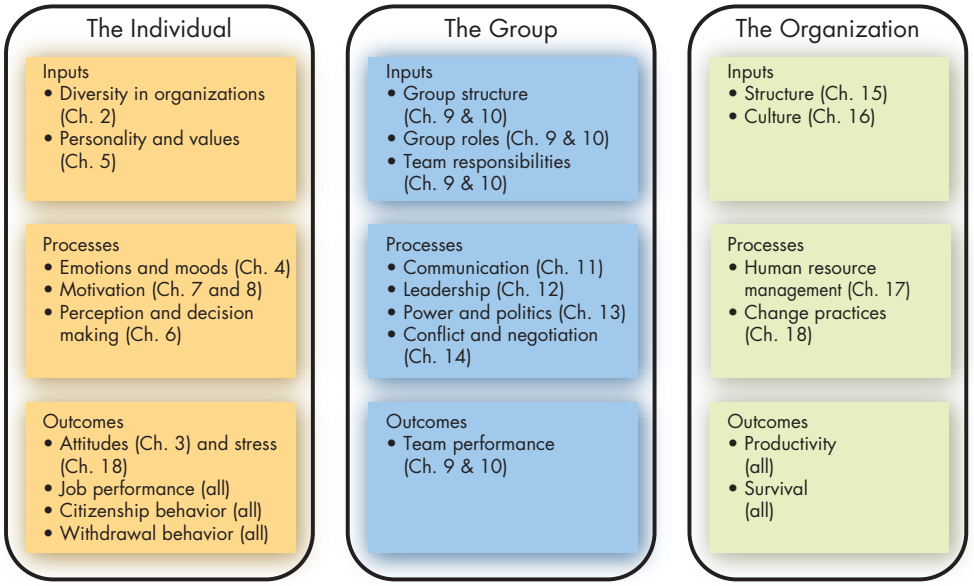
1. **Identify your values.** Focus on three to five values that are most important to who you want to be as a person. This action will help you clarify what is important to you.
2. **Develop a list of questions directed at your (or a potential) employer.** These should be open-ended questions that will help you determine which values the company espouses. You can contemplate how your employer would respond, review your employers' mission or value statements, or even informally ask around your work group. It is also a good idea when interviewing with a new job to ask your interviewer this question or—even better—to do some fact-finding before the interview to find out yourself to ask informed follow-up questions.
3. **Seek out jobs and work arrangements that are consistent with your authentic self.** Research demonstrates that prioritizing consistency between your values and your employer's values will make it less likely that you choose to leave or engage in withdrawal behaviors. However, this does not just go for the relationship between you and your organization. For instance, it may be that your values do not align with your work group, your team, or your supervisor. Or it may be that the values portrayed on paper do not match what the organization actually does. In either case, a values mismatch is very difficult to change. It can be detrimental to your performance and well-being. In contrast, a values match often provides the right foundation for you to flourish and excel in your job, career, and organization.[151]

TripAdvisor reviews and nearly 8,000 managerial responses suggests that when managers personally respond to online reviews, financial performance (e.g., revenue per available room) increases.[152]

Survival The final outcome we will consider is **organizational survival**, which is simply evidence that the organization can exist and grow over the long term. The survival of an organization depends not just on how productive the organization is but also on how well it fits its environment. A company that is very productive in making goods and services of little value to the market is unlikely to survive for long. So survival relies on perceiving the market successfully, making good decisions about how and when to pursue opportunities, and successfully managing change to adapt to new business conditions.

organizational survival The degree to which an organization can exist and grow over the long term.

Exhibit 1-6 The Plan of the Text



Having reviewed the input, process, and outcome model, we will change the figure slightly by grouping topics based on whether we study them at the individual, group, or organizational level. As you can see in Exhibit 1-6, we deal with inputs, processes, and outcomes at all three levels of analysis, but we group the chapters as shown here to correspond with the typical ways research has been done in these areas. For example, it is easier to understand one unified presentation about how personality leads to motivation, which leads to performance, than to jump around levels of analysis. Each level builds on the one that precedes it, so after going through them in sequence, you will have a good idea of how the human side of organizations functions.

Employability Skills

1-7 Describe the key employability skills gained from studying OB that are applicable to other majors or future careers.

Challenges relevant to OB can be found in just about every business function, from finance and accounting to management and marketing. Without a doubt, at some point in your career, you will come across an issue that hinges to no small degree on people's behavior in organizations. A review of the significant challenges that most businesses face reveals that OB is an essential piece of the puzzle in solving many organizational problems. For instance, these problems may involve managing integrity/social responsibility, resource management, competition among businesses, bolstering customer and employee loyalty, reducing uncertainty, complying with government regulation, managing risks, and finding the right staff—all while growing revenue and increasing profit.[153]

But OB is not relevant to business majors only; it is vital for all students, no matter what their majors are. At first glance, for example, it might not seem as if a university student with a microbiology degree would have any need to take an OB class. But what happens after that student graduates? Wouldn't knowledge of OB principles and concepts help them apply to and be successful at a job as a biology technician with Battelle? What about a graduate with a nursing degree working at the Mayo Clinic? A computer science graduate who is about to begin work with Cisco? OB principles matter for students of all majors. They can help increase

employability as well as interpersonal skills in the workplace. These skills can help you become successful in your classes as you interact with other students and your professors! Clearly, the knowledge of OB concepts such as stress management, change, attitudes, emotions, and motivation, among others, can help you navigate your interactions with your classmates as you continue to learn.

People, along with their behaviors, differences, attitudes, emotions, moods, personalities, values, intentions, thoughts, and motivations, are inextricably linked to life in the workplace. As professor Benjamin Schneider notes, "The people make the place."[154] These employees interact and communicate with one another within and across work groups, departments, teams, and organizations to help accomplish the organization's goals. Leaders within these organizations (along with the employees themselves) seek to effect change, establish an organizational culture, and set policies and procedures: processes that inevitably involve leadership, politicking, conflict, and negotiation. Given OB's pervasiveness in organizational life, entry-level employees and working professionals would benefit from having solid foundational skills in OB, such as communication, collaboration, critical thinking, problem solving, social responsibility, and knowledge application and analysis.

This section explores the career employability skills that a course in OB can help expand for those who select *any* major—from engineering to political science.

Employability Skills That Apply Across Majors

Throughout this text, you will learn and practice many skills that hiring managers identify as crucial to success in various business settings, including small and large firms, nonprofit organizations, and public service. These skills will also be useful if you plan to start your own business, for example:

- *Critical thinking & creativity* involve purposeful and goal-directed thinking used to define and solve problems, to make decisions, or to form judgments related to a particular situation. The goal of this process is to produce novel and useful ideas. It involves cognitive, metacognitive, and dispositional components that may be applied differently in specific contexts.
- *Communication* is defined as effective use of oral, written, and nonverbal communication skills for multiple purposes (e.g., to inform, instruct, motivate, persuade, and share ideas); effective listening; using technology to communicate; and being able to evaluate the effectiveness of communication efforts—all within diverse contexts.
- *Collaboration* is a skill in which individuals can actively work together on a task, constructing meaning and knowledge as a group through dialogue and negotiation that results in a final product reflective of their joint, interdependent actions.
- *Self-management* is defined as the ability to intentionally and strategically manage one's behavior, effort, and emotions in the pursuit of goals. It involves building skill in self-control, self-monitoring, and self-regulation.
- *Social responsibility* includes skills related to both business ethics and corporate social responsibility. Business ethics includes sets of guiding principles that influence the way individuals and organizations behave within the society that they operate in. Corporate social responsibility is a form of ethical behavior that requires that organizations understand, identify, and eliminate unethical economic, environmental, and social behaviors.
- *Leadership*, as described in depth in the corresponding chapter, focuses on the ability or skill to influence a group toward the achievement of a vision or set of goals. Leadership involves learning to establish a vision, modifying one's style or approach to meet particular goals, building productive and meaningful relationships with followers, and engaging in influence behaviors.

- *Career management* involves developing an understanding of the "real-world" employment context along with the professional acumen needed to successfully transition between jobs and careers. This involves exploring different careers, impression management and personal branding, networking skills, and navigating the labor market.

Each of the text chapters starts with what we refer to as the employability skills matrix (ESM). As you can see in the table below, this matrix links the seven employability skills that were just defined with unique features in each chapter, including Myth or Science?, An Ethical Choice, Point/Counterpoint, Toward a Better World, Experiential Exercise, Ethical Dilemma, and the Case Incident. Within these sections, you will be primed to think critically and creatively to consider special cases and concepts. You will also learn how to improve your self-management, collaboration, and communication skills by learning what you might do or say in these given situations to positively and effectively navigate the work world. You will be confronted with ethical dilemmas and opportunities in which you will consider the ethics of particular behaviors in the workplace and contemplate how organizations can contribute to the good of society. In many instances, you will take on the role of a manager or leader and weigh particular actions to solve leadership problems. Lastly, you will encounter real career or job search situations in which you will be presented with a problem or dilemma that you must navigate properly. We recommend that you review and evaluate the ESM in advance of reading the chapter to have a better idea of the skills you will be developing from each section. All seven of these skills are critical to success in careers relevant to OB and other majors alike. In the chapters to come, you will engage in various activities and become exposed to several cases in which you will be developing these skills.

Employability Skills Matrix (ESM)

	Myth or Science?	An Ethical Choice	Point/Counterpoint	Toward a Better World	Experiential Exercise	Ethical Dilemma	Case Incident
Critical Thinking & Creativity		✓	✓	✓	✓	✓	✓
Communication	✓	✓			✓	✓	✓
Collaboration	✓				✓	✓	✓
Self-Management	✓	✓				✓	✓
Social Responsibility				✓		✓	
Leadership	✓			✓	✓		
Career Management		✓	✓				✓

Summary

Managers and workers alike need to understand behavior in organizations and develop the skills required to be effective in their jobs. OB investigates the impact that individuals, groups, and structure have on behavior within an organization. It applies that knowledge to make organizations work more effectively. OB covers many topics that have important implications for nearly all aspects of working life and at all levels of the organization, from gig workers to CEOs. Heavily influenced by major behavioral science disciplines, OB applies systematic study to what goes on within organizations. As a result of this systematic study, OB researchers derive evidence-based practices and the contingencies for when they are most and less likely to be successful. Employees and managers can use them to make informed decisions. Today, this often involves leveraging large amounts of data to understand organizational phenomena better—a practice that has been dramatically enhanced by the artificial intelligence revolution. Overall, OB is a system of inputs, processes, and outputs of importance to organizations. Researchers examine the links in this chain to determine how organizational phenomena unfold. This system changes in response to the environment; however, current opportunities and challenges (i.e., COVID-19, the Gig Economy) will no doubt be influencing our understanding of behavior in the workplace for decades to come. At the end of the line, organizations and the people who "make" them can use these evidence-based practices to be more productive, efficient, happier, and healthier. A knowledge of OB can benefit you because it can help you develop employability skills, which you can use regardless of your background and which can aid you in your future career.

Implications for Managers

- Resist the inclination to rely on generalizations; some provide useful insights into human behavior, but many are erroneous.
- A nuanced understanding of the situation is often needed to reach the best solutions. Try to understand the people involved and the context. From there, try and figure out what works, what does not work, and any contingencies that qualify these practices.
- Strive for evidence-based solutions to problems and evaluate your hunches and intuition critically.
- Work on your people skills to better interact with peers, work on teams more effectively, and both lead and manage your followers to do great things.
- Improve your technical skills and conceptual skills through training, development, and staying current with OB trends affecting the world of work, like the Gig Economy, big data, and AI.
- OB can be important for many relevant outcomes such as worker satisfaction. But it also contributes to significant organizational outcomes that can affect organizational financial performance, such as labor productivity and turnover reduction.

Business Books: Facts? Or Just Fads?

POINT

Conduct a quick search on Amazon and you will find a wide selection of management books whose titles tell us the topics we apparently need to know about:

- *Drive to Thrive* (Bajaj, 2020)
- *The Savage Leader: 13 Principles to Become a Better Leader from the Inside Out* (Reinke, 2021)
- *The First-Time Manager* (McCormick, 2018)
- *The Making of a Manager: What to Do When Everyone Looks to You* (Zhuo, 2019) *American Crisis: Leadership Lessons from the COVID-19 Pandemic* (Cuomo, 2020)
- *How to Lead When You're Not in Charge* (Scroggins, 2017)
- *Radical Candor* (Scott, 2017)
- *Leadershift* (Maxwell, 2019)
- *Excellence Wins* (Schulze, 2019)

Popular books on OB often have cute titles and are fun to read, but they make the job of managing people seem like it is just a matter of having a good slogan and five easy steps. If you dig into the texts, you will find that most are based on the author's opinions rather than substantive research. Most become popular in part because people primarily agree with the opinions they are reading and enjoy the author's writing style. Often, the writers are presentation speakers or consultants whose real business is delivering ideas to you. When the author is a veteran from the business world, it is doubtful that one person's experience translates into an effective management practice for everyone. So why do we base our management philosophies on these books when, with a little effort, we can access knowledge produced by thousands of scientific studies on human behavior in organizations?

OB is a complex subject. Few if any simple statements about human behavior are generalizable to all people in all situations. Would you try to apply leadership insights you got from a book about *Star Wars* or *Breaking Bad* to managing software engineers in the twenty-first century? Surely not. Neither should we try to apply leadership insights that are not based on research about the type of workplaces in which we function.

COUNTERPOINT

People want to know about management—the good, the bad, and the ugly. People who have experience or high interest write about the topics that interest readers, and publishers put out the best of these texts. When books become popular, we know people are learning from them and finding good results by applying the author's management ideas. Texts like these can provide people with the secrets to management that others have worked out through experience. Isn't it better to learn about management from people in the trenches instead of academia's latest obscure references? Many of the most important insights we gain in life are not necessarily the product of careful empirical research studies.

Unhelpful management guides sometimes get published, and once in a while, they become popular. But do they outnumber the esoteric research studies published in scholarly journal articles every year? Far from it, sometimes it seems that there are thousands of scholarly journal articles for every popular business text. Many of these articles can hardly be read by individuals in the workplace. They are buried in academic libraries, riddled with strange acronyms and insider terms, and light on practical application. Often they apply to specific management scenarios, so they are even less generalizable. For example, a few recent management and OB studies were published with the following titles:

- "Transferring Management Practices to China: A Bourdieusian Critique of Ethnocentricity" (Siebers, Kamoche, & Li, 2015)
- "Cross-Cultural Perceptions of Clan Control in Korean Multinational Companies: A Conceptual Investigation of Employees' Fairness Monitoring Based on Cultural Values" (Yang, 2015)
- "The Resistible Rise of Bayesian Thinking in Management: Historical Lessons from Decision Analysis" (Cabantous & Gond, 2015)
- "A Model of Rhetorical Legitimation: The Structure of Communication and Cognition Underlying Institutional Maintenance and Change" (Harmon, Green, & Goodnight, 2016)

We do not mean to poke fun at these studies, but our point is that all ways of creating knowledge can be criticized. If business books are sometimes light reading, academic articles can be esoteric and even less relevant. Popular books can add to our understanding of how people work and how to manage them best. We should not assume they are not of value. And while there is no one right way to learn the science and art of managing people in organizations, the most enlightened managers gather insights from multiple sources. These might include their own experience, research findings, observations of others, and, yes, the popular business press. Authors and academics have an essential role to play, and it is not fair to condemn business books with catchy titles.

CHAPTER REVIEW

QUESTIONS FOR REVIEW

1-1 What is the definition of organizational behavior (OB)?

1-2 How does systematic study contribute to our understanding of OB?

1-3 What are the major behavioral science disciplines that contribute to OB?

1-4 Why are there so few absolutes in OB?

1-5 What are the current challenges and opportunities to managers' understanding of OB?

1-6 What are the three levels of analysis in our OB model?

1-7 What are the key employability skills gained from studying OB?

EXPERIENTIAL EXERCISE Managing Remote Teams

Guava is a music streaming service located in Silicon Valley that is steadily growing (with roughly 500 employees currently). Guava has plans to hire many new employees within the coming year. The CEO, Lennox Reynolds, has a vision to permanently transition roughly half of the existing employees to remote work and potentially hire additional remote workers. Reynolds also wants the company to develop a flatter structure. Rather than have departments organized by traditional functions like engineering or marketing, employees would work on project teams and have greater autonomy. Reynolds believes this will allow creativity and innovation to thrive (helping Guava develop a competitive advantage). Reynolds thinks a rigid traditional structure restricts employees and stifles creativity and innovation. Rather than having a single designated leader, teams will allow individuals to emerge as leaders.

However, despite Reynolds' grand plans, most of the other executives at Guava raise issues with this vision and find it too ambitious. Lennox believes her plan will save the company money as it will no longer need to build or maintain offices to accommodate employees. She is also confident that employees will find this arrangement favorable, resulting in better employee retention. Remote work would require fewer employees to relocate to more expensive areas, promote work–life balance, and eliminate wasted time employees spend commuting.

Despite Lennox outlining the potential benefits of remote work, the other executives pointed out several possible issues. These include the challenge of setting boundaries between work and home life, ensuring that employees are productive, providing mentorship and development for newer employees, and developing a new structure for making important decisions. Furthermore, all employees were surveyed to assess whether they would choose to work remotely full-time or part-time if given the option. Thirty percent of existing employees said they were very interested in working remotely full-time. Another 20 percent said they were somewhat interested. While some employees have expressed strong preferences for working remotely, other employees and many supervisors have various concerns. Guava needs to decide soon regarding its remote work policy. The decision will impact whether the company chooses to scale back office space and require significant structural changes.

Reynolds believes it is extremely promising that roughly 50 percent of employees are interested in working remotely. Reynolds recognizes that employees have concerns and that Guava would likely face obstacles when implementing the new plan to alter its structure. As a result, she sends an e-mail outlining potential changes to address remote work concerns to the leadership team. Reynolds plans to hold a meeting with a few of the executives to discuss her proposed changes, including how employees would be approved to work remotely, the development of enhanced employee training, and the use of employee monitoring software to ensure that employees remain productive.

After reading the scenario, form a group with four other students. One individual should take on the role of the CEO, Lennox Reynolds. At the same time, the other group members will assume the role of executives at the company. During your meeting, you must answer the following questions.

Questions

1-8. Should the company proceed with plans to transition half of its employees to full-time remote work? Why or why not?

1-9. If the company transitions to remote work, do you believe the changes Reynolds outlines will be effective? Why or why not?

1-10. Are the changes Guava is implementing going to impact the company negatively? What other changes should Guava make, if any?

1-11. Are there any other obstacles that Guava may encounter when transitioning employees to remote work? How could the company limit the number of obstacles?

ETHICAL DILEMMA Credit Where Credit Is Due

You are preparing for the weekly team meeting, during which each team member shares a new idea that they have been working on that week. One idea in particular receives very positive feedback. The idea sticks with you as incredibly innovative, and you remark to your coworker, Aiden, "Wasn't that a great idea that Alex shared?"

You are surprised to see that Aiden, who is almost always in a good mood, has a disgruntled look on his face. "I thought so too when I was researching and preparing to present the idea to the team myself," Aiden responds.

"Well, I have to say I'm surprised Alex would do something like that. What do you plan to do then?" you ask. You are not quite sure what you would do in this situation either. Although your company is a proponent of collaboration, it is also a proponent of recognizing team members' unique contributions.

Alex has a conflicted look on his face and pauses a moment. "I suppose since I hadn't presented the idea to the team yet, it is not technically my idea. On the other hand, I put a lot of work into researching the idea, and Alex knew this because I shared it with her. I didn't think that she would completely take the idea as her own. But Alex and I work together frequently. I do not want to create an uncomfortable situation." Finally, after a long pause, Aiden says more confidently, "I'm not going to say anything. I think I was overacting."

"Well, it is your decision, I suppose," you hesitantly respond as Aiden is already making his way back to his desk.

Questions

1-12. What, if any, are the ethical issues in play in this situation?

1-13. Do you agree with how your coworker plans to handle the situation? Why or why not?

1-14. What do you think would be the ideal decision in this situation, and why? Does the ideal decision differ from what your coworker proposes?

1-15. What do you think will be the consequences of your coworker's actions?

1-16. How do motivation and intention play a role for both you and your coworker?

CASE INCIDENT Work–Life Balance at R.G. & Company

Tatum is a consultant at R.G. & Company (R.G.), a global consulting firm. She has enjoyed the past few years working at the company. As an ambitious person, she has been focusing on her long-term goal of advancing within the company. Furthermore, Tatum has always been passionate about her work and could not imagine working anywhere else. Nonetheless, working at R.G. as a mother of a young child has not been without its challenges. The company does offer some flexibility in terms of when she is in the office. As long as she completes her work, her supervisors usually do not care if she leaves early or works from home when her daughter is sick.

Although Tatum may work long hours at home, she knows that she is not perceived the same way as those who stay late working at the office. In her office, it seems like everyone expects you to stay late to demonstrate your dedication and to have any chance of being promoted. If Tatum wants a promotion, she believes she needs to make herself stand out among all the company's qualified individuals.

R.G. has policies to accommodate those with family responsibilities. But, in practice, Tatum knows that few employees take advantage of them. For example, Tatum was a little surprised at how quickly her supervisor, Kennedy, returned to the office after having a child. However, Kennedy was much admired at R.G. and was held up as an example that it was possible to have it all—to be a successful working mother. The alternative was for Tatum to transition to working part-time or switch to a less demanding role. Unfortunately, these alternatives would essentially mean putting aside her goal of advancement.

On the other hand, she had heard others make comments when another woman who had two younger children stayed late at the office. Some would say, "Why don't

you get home to your kids?" or "Don't your kids miss you?" To Tatum, it felt like a constant balancing act between trying to be an exemplary employee and ensuring she was not perceived to be a neglectful mother.

One aspect that had initially drawn Tatum to this organization was the "accommodations" (i.e., flexible work hours, fewer responsibilities, and part-time hours), particularly for women. However, she now felt almost guilty in thinking that these "accommodations" were more likely to hurt than help her professionally. Thankfully, her partner earned enough to comfortably support their family if Tatum decided to work fewer hours or transition roles. Still, Tatum was having trouble coming to terms with the possibility of not achieving her professional goals.

Questions

1-17. Do you believe the accommodations offered by Tatum's firm are effective in helping individuals balance work and family lives? Why or why not?

1-18. Are there any practices or policies that the organization could implement to allow for greater work–life balance?

1-19. Are there any actions Tatum could take to achieve both her professional goals and work–life balance?

1-20. How important do you believe work–life balance is for job satisfaction and career success?[155]

2 Diversity, Equity, and Inclusion in Organizations



Source: Design Pics/Alamy Stock Photo

LEARNING OBJECTIVES

After studying this chapter, you should be able to:

2-1 Describe the two major forms of workplace diversity.

2-2 Demonstrate how workplace prejudice and discrimination undermines organizational effectiveness.

2-3 Explain how four major theoretical perspectives contribute to our understanding of workplace diversity.

2-4 Describe the role diversity plays in the interactions between people.

2-5 Discuss the implications of cross-cultural matters for organizational behavior (OB).

2-6 Describe how organizations manage diversity effectively.

This matrix identifies which features and end-of-chapter material will help you develop specific skills employers are looking for in job candidates.

Employability Skills Matrix (ESM)

	Myth or Science?	An Ethical Choice	Point/ Counterpoint	Toward a Better World	Experiential Exercise	Ethical Dilemma	Case Incident
Critical Thinking & Creativity		✓	✓	✓	✓	✓	✓
Communication	✓				✓	✓	
Collaboration					✓		✓
Self-Management	✓				✓	✓	✓
Social Responsibility		✓	✓	✓	✓	✓	✓
Leadership	✓	✓	✓	✓			✓
Career Management	✓	✓	✓	✓		✓	

A LACK OF DIVERSITY IN THE TECH INDUSTRY

The tech industry has been notorious for failing on the diversity and inclusion front. Apple, Facebook, Google, and Microsoft may be the biggest technology companies across the world, yet the diversity reports they have posted for the past five years consistently present the same picture, an industry dominated by White and Asian men.

There has been some progress since 2014. Facebook, for instance, says the percentage of its female employees globally has increased from 15 to 23 percent. However, ethnic diversity remains low. Over the same time period, the proportion of U.S. technical employees at Google and Microsoft who are African American or Latinx rose by only about 1 percent. The share of African American technical workers at Apple is 6 percent, less than half the 13 percent proportion of African Americans in the U.S. population. Ageism also continues to be a challenge; when tech workers hit 45, their job offers drop and salaries start to fall.

In the United Kingdom too, data on diversity in the tech industry is disappointing, lagging far behind the Financial Times Stock Exchange 100 (FTSE 100) Index. About 8.5 percent of senior executives in technology are from a minority background, while women make up just 12.6 percent of board members in the sector, compared with the 30 percent female representation

achieved by FTSE 100 businesses. The picture is similar across Europe. According to the *2019 State of European Tech Report*, there was a record investment of about €30 billion in the industry across the continent, yet 92 percent of the investment went to all-male founding teams, and funding to all-female teams actually dropped. Of the hundreds of founders that responded to the survey, 84 percent self-identify as White, and just 0.9 percent are of African descent. And 82 percent of founders are university educated, as compared to the 35 percent of people across Europe.

The status quo is particularly troubling because of how technology now affects every sector, from transport, to finance, to the government, to health care. If only today's tech-literate workers can access these growing employment opportunities, swaths of the general population will be left behind. The products and services they make will be skewed too. The lack of inclusion affects the design of the goods and services that the industry creates. For instance, voice recognition initially did not respond to women because the designers who tested the products were male. Facial recognition is notoriously poor at recognizing darker and female faces, again partly because of biased training data. A more diverse workforce will lead to better products that can address a wider range of customers, who may include people from different ethnic and socioeconomic backgrounds as well as the elderly and the disabled.[1]

Despite decades of research, the world changes quickly, and scientists and practitioners still do not have all of the answers. But OB scientists (heavily influenced by advancements in the fields of social psychology and sociology) have still made substantial progress toward this aim. It is our hope that after studying this chapter, you leave with a better understanding of the intersection between OB and diversity. More importantly, we hope you gain an idea of what can be done to effectively manage diversity and craft an inclusive environment in which people can flourish.

Understanding Diversity

2-1 Describe the two major forms of workplace diversity.

We are, each of us, unique. Our uniqueness is obvious enough, but employees and managers often do not recognize, appreciate, and manage individual differences to forge inclusive and productive workplaces. Consider Mughal Emperor Shah Jahan, who employed 22,000 artisans from around the world to construct and design the Taj Mahal—today, this "crown of palaces" represents myriad influences, including Islamic, Persian, Ottoman, and Indian, among others.[2] Although diversity may seem like a new hot-button issue, in many ways it is something humanity has struggled to come to terms with for millennia. In this chapter, you will learn more about how individual characteristics like age,

gender identity, sexual orientation, race, ethnicity, and culture can influence interactions and performance in the workplace. You will also see how managers can develop awareness about these characteristics and manage a diverse workforce effectively. But first, let's more explicitly unpack what we mean be "diversity."

Levels of Diversity

As we defined in the previous chapter, *workforce diversity* refers to the heterogeneous characteristics that make up organizations, work groups, and teams. When we think of diversity, we often think of mostly **surface-level diversity**, such as gender, age, and race. Surface-level diversity can lead employees to make stereotypes and assumptions about others from certain demographic backgrounds. However, evidence has shown that people are less concerned about demographic differences if they see themselves as sharing more important characteristics, such as personality and values, that represent **deep-level diversity**.[3]

surface-level diversity Differences in easily perceived characteristics, such as gender, race, ethnicity, or age, that do not necessarily reflect the ways people think or feel but that may activate certain stereotypes.

deep-level diversity Differences in values, personality, and work preferences that become progressively more important for determining similarity as people get to know one another better.

To understand the difference between surface- and deep-level diversity, consider an example. Some of you may have worked in a professional kitchen or as a member of the waitstaff at a restaurant. You would certainly agree that these environments are often stressful: During busy periods, things can get hectic both in the kitchen and out on the floor.[4] To top it all off, there are so many people you have to interact with to ensure the customer has an excellent experience: the hosting staff, management, kitchen, runners, bussers—not to mention the most important people: the customers! All these people bring their own set of unique characteristics "to the table." One of the kitchen staff members, Bellamy, is a young Black man from Austin who works part-time as a kitchen assistant while pursuing an accounting degree. Hector, his co-worker, a station chef, is an older Hispanic man who relocated from Honduras a few years ago. At first, these coworkers may notice their surface-level differences in race, age, or background. However, as they get to know one another, they may find they share a common way of thinking about work problems and have similar perspectives on time management. These deep-level similarities can overshadow the more superficial differences between them, and research suggests that sharing similarities (especially similar work styles) will help them work well together.[5] For example, if Bellamy and Hector have similar time management styles (both get to work on time and do prep work well in advance), they will be more likely to get along together and experience less conflict.

Although much has been said about surface-level diversity, experts recognize that these characteristics are just the tip of the iceberg.[6] In the next section, we review a few major biographical characteristics, recognizing that the groups and defining characteristics people identify with transcend this list.

Biographical Characteristics

Biographical characteristics such as age, gender identity, race, and ethnicity are some of the most obvious ways employees differ. Let's begin by looking at these factors that are readily available—data that can be obtained, for the most part, from an employee's human resources (HR) file. These and several other characteristics, are what comprise surface-level diversity. Variations in these surface-level characteristics may be the basis for discrimination against classes of employees.

biographical characteristics Personal characteristics—such as age, gender, race, and ethnicity—that are objective and easily obtained from personnel records. These characteristics are representative of surface-level diversity.

Race and Ethnicity In an "Address to the Nations of the World" given in London in 1900, W. E. B. Du Bois noted that the problem of the twentieth century could be found in how racial differences have been drawn upon to deny hundreds of thousands of people worldwide the opportunities and privileges of modern civilization.[7] Although problems with discrimination and prejudice, identified later in this chapter, are still major societal issues, laws against racial and ethnic discrimination are in effect in many countries, including Australia, the United Kingdom, and the United States.[8]

We define *race* as the heritage people use to identify themselves; *ethnicity* is the additional set of cultural characteristics that often overlaps with race. Typically, we associate race with biology and ethnicity with culture, but there is a history of self-identifying for both classifications. Some industries have remained less racially diverse than others. For instance, U.S. advertising and media organizations suffer from a lack of racial diversity in their management ranks, even though their client base is increasingly ethnically diverse.[9] Race and ethnicity have been studied as they relate to employment outcomes such as hiring decisions, performance evaluations, pay, and workplace discrimination (which will be discussed later in this chapter).[10]

Due to systemic racism, racial and ethnic minorities report higher levels of discrimination in the workplace.[11] Black people generally fare worse than White people in employment decisions (a finding that may not apply outside the United States). They receive lower ratings in employment interviews, lower job performance ratings, less pay, and fewer promotions.[12] Lastly, Black people are discriminated against even in controlled experiments. For example, one study of low-wage jobs found that Black applicants with no criminal history received fewer job offers than did White applicants with criminal records.[13]



Target store manager Jerald Bryant (center) is shown motivating a team that reflects demographic traits of today's workforce. By making diversity management a central part of its policies and practices, Target has created a gender-balanced, multiethnic, and inclusive workplace.
Source: Charles Bertram/*Lexington Herald-Leader*/ZUMA Press Inc./Alamy Stock Photo

Age Age in the workforce is likely to be an issue of increasing importance during the next decade for many reasons. For one, the workforce is aging worldwide in most developed countries,[14] and legislation in the United States has, for all intents and purposes, outlawed mandatory retirement. Most workers today no longer have to retire at age 70, and 53 percent of workers over the age of 60 plan to delay retirement, likely due to the strong financial benefits of doing so.[15] Moreover, reflecting global trends, over 40 countries spanning all continents have laws directly prohibiting age discrimination.[16]

Stereotypes of older workers as being behind the times, grumpy, and inflexible are changing. Managers often see a number of positive qualities that older workers bring to their jobs, such as experience, judgment, a strong work ethic, and a commitment to quality. For example, the Public Utilities Board, the water agency of Singapore, reports that 27 percent of its workforce is over age 55 and the older workers provide workforce stability.[17] Industries like health care, education, government, and nonprofit service often welcome older workers.[18] But older workers are still perceived as less adaptable and less motivated to learn new technology.[19] Despite the stereotypes, the majority of studies have shown "virtually no relationship between age and job performance," according to Harvey Sterns, director of the Institute for Life-Span Development and Gerontology.[20] The evidence is more nuanced for job satisfaction, an important topic discussed in more depth in the next chapter. A review of more than 800 studies found that older workers tend to be more satisfied with their work and report better relationships with coworkers. However, one study drawing on over 20,000 participants spanning 40 years suggests that people are becoming less satisfied with their jobs the longer they stay at any given organization. Despite this finding, as people age, their job satisfaction tends to increase, most likely because their pay and benefits increase.[21] So as you get older, you should expect to like your work more and more!

Myth or Science?

Bald Is Better

It appears true that bald is better for men in the workplace. A recent study showed that observers believe a male's shaved head indicates greater masculinity, dominance, and leadership potential than longer or thinning hair. Thinning hair was perceived as the least powerful look, and other studies have agreed that male-pattern baldness (when some hair remains) is not considered advantageous. Why is this?

In some respects, the reported youthful advantage of a shaved head is counterintuitive. Because we have more hair when we are young and contemporary culture considers youthfulness a desirable characteristic in the workplace (if you doubt this, see the discussions on aging in this chapter), it would make more sense for a hairless head to be a distinct disadvantage. Yet the media is loaded with images of powerful men with shaved heads—military heroes, winning athletes, and action heroes. No wonder study participants declared that the men with shaved heads were an inch taller and 13 percent stronger than the same men with hair.

A bald head has become the hallmark of some important business leaders, notably Jeff Bezos of Amazon, Lloyd Blankfein of Goldman Sachs, Marc Andreessen of Netscape, and *Shark Tank* investor Daymond John. Men who shave their heads report that it can give them a business advantage, whether or not it makes them look younger (which is debatable). According to psychologist Caroline Keating, just as older silverback gorillas are "typically the powerful actors in their social groups," so it is in the office, where baldness may "signal who is in charge and potentially dangerous." Research professor Michael Cunningham agrees, adding that men with shaved heads convey aggressiveness, competitiveness, and independence. Though we do not wish to advocate head shaving for this reason, it does demonstrate how biased we continue to be in judging people by superficial characteristics. Time will tell if this situation ever improves.[22]



At Tofutti, maker of dairy-free products, older employees are an integral part of the workforce. Tofutti's CEO David Mintz values the experience, work ethic, maturity, enthusiasm, knowledge, and skills that older workers bring to their jobs. He says older employees have fewer absences, make fewer mistakes, are better at solving problems, and are willing to work more hours.
Source: Julio Cortez/AP images

Gender Identity and Sexual Orientation The best place to begin to consider this topic is with the recognition that neither gender identity nor sexual orientation appear to affect job performance or leadership.[23] In this text, when we refer to **gender identity**, we mean peoples' deeply held sense of or identification with their own gender. It is important to recognize that gender identity does not necessarily match one's sex at birth, is not visible to others, and cannot be neatly categorized. By **sexual orientation**, we mean peoples' patterns of enduring physical, emotional, and/or romantic attraction toward others. Differences in pay, benefits, and rewards concerning gender are strong and substantial (see OB Poll), with recent estimates that they are up to fourteen times the size of performance differences.[24] And biases and stereotypes persist, resulting in what has been called the *glass ceiling*, impeding the advancement of those who identify as women. In the hiring realm, managers are influenced by gender bias when selecting candidates for certain positions.[25] For instance, men are preferred in hiring decisions for male-dominated occupations, particularly when men are doing the hiring.[26]

gender identity Peoples' deeply held sense of or identification with their own gender that does not necessarily match their sex at birth, is not visible to others, and cannot be neatly categorized.

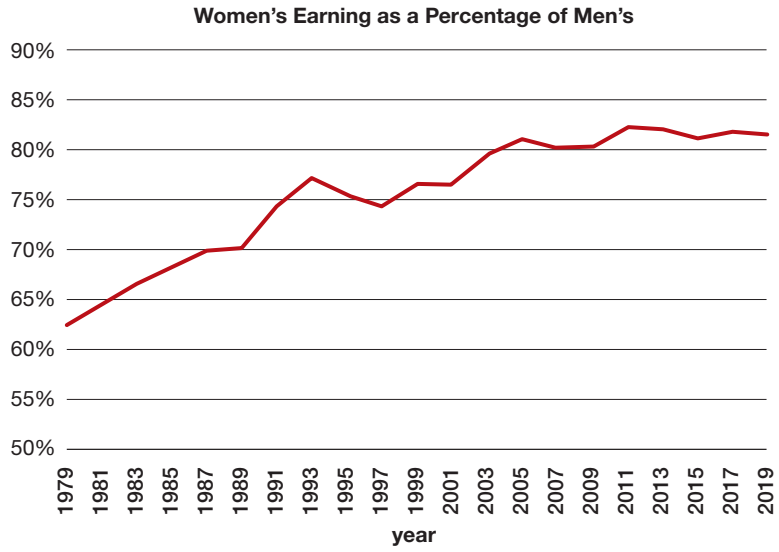
sexual orientation Peoples' patterns of enduring physical, emotional, and/or romantic attraction toward others.

Once on the job, they may be offered a similar number of developmental experiences, but women are less likely to be assigned challenging positions by men, assignments that could help them achieve higher organizational positions.[27] Moreover, men are more likely to be chosen for leadership roles even though men and women are equally effective leaders. In fact, as of April 2020, women held only 6 percent of CEO positions in S&P 500 companies.[28] Furthermore, a study of twenty organizations in Spain suggested that women are generally selected for leadership roles that require handling organizational crises—positions in which they are usually set up to fail, a phenomenon commonly referred to as the *glass cliff*. According to Naomi Sutherland, senior partner in diversity at recruiter Korn Ferry, "Consciously or subconsciously, companies are still hesitant to take the risk on someone who looks different from their standard leadership profile."[29]

These stereotypes counter the evidence that suggests that women are effective leaders in organizations: Not only does research from hundreds of studies suggest that women are rated as effective leaders in organizations, but it also shows that women's representation in leadership positions is actually predictive

OB POLL

Gender Pay Gap: Narrowing but Still There



Note: Full-time wage and salary workers. Percentage of annual averages of median weekly earnings.
Source: U.S. Bureau of Labor Statistics, "Highlights of Women's Earnings in 2019" (Report No. 1089, December 2020), https://www.bls.gov/opub/reports/womens-earnings/2019/home.htm

of financial performance in hundreds of thousands of organizations.[30] We have seen that there are many misconceptions and contradictions about gender in the workplace. Thankfully, many countries, including Australia, the United Kingdom, and the United States (following the 2020 Supreme Court decision protecting gender identity and sexual orientation from discrimination), have laws against gender identity and sexual orientation discrimination. Other countries, such as Norway, seek gender diversity through laws to increase the percentage of women on boards of directors.[31] Many organizations have implemented policies and procedures that cover sexual orientation and gender identity. Surveys indicate that more than 90 percent of Fortune 500 companies have policies that cover sexual orientation. (More than 80 percent have policies covering gender identity.) Recent statistics in the Corporate Equality Index published by the Human Rights Campaign show that in 2022 93 percent of Fortune 500 companies had non-discrimination policies for sexual orientation and 91 percent had similar policies for gender identity.[32]

While much has changed, the full acceptance and accommodation of lesbian, gay, bisexual, transgender, queer/questioning, and other gender identifications (LGBTQ+) employees remains a work in progress.[33] In the United States, a Harvard University study sent fictitious but realistic résumés to 1,700 actual entry-level job openings. The applications were identical with one exception: Half mentioned involvement in gay organizations during college, and the other half did not. The applications without the mention received 60 percent more callbacks than the ones with it.[34] Perhaps as a result of perceived discrimination, many LGBTQ+ employees do not disclose their sexual orientation. For example, Beck Bailey, a former employee at Stouffers in the late '80s (now deputy director of the Human Rights Campaign Workplace Equality Program), recalled what it was like identifying as a woman and a lesbian in the workplace, where it was difficult to be oneself, as well as the need to keep a picture of a "fake boyfriend" at the desk for fear of being discovered.[35] Organizations should be supportive of gender identity and sexual orientation diversity. Research suggests that disclosing gender identity and sexual orientation is good for reducing work–family conflict, improving partner

satisfaction, physical and mental well-being, and job satisfaction.[36] Furthermore, transgender employees who undergo transitioning and gender reassignment surgery experience higher job and life satisfaction afterward, "empowered" and "free" to be their authentic selves.[37]

Organizations and managers are beginning to understand, little by little, that there are both ethical and financial reasons to be more inclusive: for instance, the LGBTQ+ consumer base accounts for almost $1 trillion in buying power. Companies like Apple are at the forefront of the corporate world in establishing policies that are sexual orientation and gender identity friendly. Apple, which boasts a 100 percent score on the 2020 Corporate Equality Index, has offered health insurance benefits to domestic partners (and has been doing so for decades) as well as six weeks of parental leave for new parents, including domestic partners.

Indeed, age, race, ethnicity, sexual orientation, and gender identity remain individual differences that organizations must address in eliminating discrimination and promoting diversity and inclusion. Throughout this text, we will encounter differences between deep- and surface-level diversity in various contexts. Diversity is an important concept in OB because individual differences shape preferences for rewards, communication styles, reactions to leaders, negotiation styles, and many other aspects of behavior in organizations. Unfortunately, increased diversity may also mean increases in discriminatory practices, which we will discuss in the next section.

Prejudice and Discrimination in Organizations

2-2 Demonstrate how workplace prejudice and discrimination undermines organizational effectiveness.

Although diversity presents many opportunities for organizations, effectively managing diversity and promoting inclusion involve working to eliminate unfair prejudice and discrimination in organizations. In this section, we define and describe how prejudice and discrimination manifest in organizations.

Prejudice and Implicit Bias

It is important to note that prejudice may exist both within and outside your own conscious awareness—it can be either *explicit* or *implicit*. We discuss prejudice and its implicit form, *implicit bias*, shortly.

prejudice An attitude representing broad, generalized feelings toward a group or its members that maintains the hierarchy between that group and other groups.

Prejudice **Prejudice** is an attitude (see the next chapter) representing broad, generalized feelings toward a group or its members that maintains the hierarchy between that group and other groups.[38] When we refer to *sexism, racism,* and *ageism,* we mean prejudice toward gender identities, races and ethnicities, and age.[39] Although we may often think of prejudice as involving uniformly negative feelings, *benevolent prejudice* can involve positive feelings.[40] As some examples, people may view Asians as the "model minority" that does well in both academic and career realms,[41] or they may view those identifying as women as kind, gentle, and deserving of masculine protection and support.[42]

implicit bias Prejudice that may be hidden outside one's conscious awareness.

Implicit Bias **Implicit bias** refers to prejudice that may be hidden outside one's conscious awareness.[43] Researchers have attempted to measure implicit bias through a very controversial test known as the *Implicit Association Test*, or IAT.[44] (See the Point/Counterpoint in the chapter on perception and decision making for further discussion.) This test measures implicit bias through how long it takes you to respond to pairings of groups and attributes (e.g., evidence

of implicit bias exists if it takes you longer to respond to a pairing of "good" and "Black people" than "good" and "White people"). For example, one study using the IAT to measure implicit bias toward applicants with obesity found that hiring managers with bias toward the obese were less likely to invite people with obesity for interviews and grant them job offers.[45] Further, some research suggests that implicit bias is contagious and that people can "catch" implicit bias by observing others' nonverbal communication and behavior.[46]

Regardless of the test and its controversies, the notion of implicit bias has had a huge impact on the world's understanding of prejudice in and around organizations. Several organizations, such as Starbucks, have begun to offer implicit bias recognition training programs,[47] and a number of consulting companies have emerged to offer this training to organizations.[48] Whether prejudice is *explicit* or *implicit,* organizations should be concerned with prejudice and bias because they can lead employees and managers to engage in discrimination in the workplace (e.g., hiring and performance evaluation).[49]

Discrimination, Disparate Impact, and Treatment

As will be described in the next chapter on job attitudes, attitudes are often the best predictors of behavior. In the context of diversity management, prejudicial attitudes often predict discriminatory behaviors. In this section, we describe discrimination and two of its forms: disparate impact and treatment.

Discrimination Prejudicial attitudes may result in discriminatory action, or **discrimination**.[50] Discrimination involves actions or behaviors that create, maintain, or reinforce some groups' advantages over other groups and their members.[51] Exhibit 2-1 provides definitions and examples of some forms of

discrimination Actions or behaviors that create, maintain, or reinforce some groups' advantages over other groups and their members.

Exhibit 2-1 Forms of Discrimination

Type of Discrimination	Definition	Examples from Organizations
Discriminatory policies or practices	Actions taken by representatives of the organization that deny equal opportunity to perform or unequal rewards for performance.	Older workers may be targeted for layoffs because they are highly paid and have lucrative benefits.
Sexual harassment	Unwanted sexual advances and other verbal or physical conduct of a sexual nature that create a hostile or offensive work environment.	Salespeople at one company went on company-paid visits to strip clubs, brought strippers into the office to celebrate promotions, and fostered pervasive sexual rumors.
Intimidation	Overt threats or bullying directed at members of specific groups of employees.	Black employees at some companies have found nooses hanging over their work stations.
Mockery and insults	Jokes or negative stereotypes; sometimes the result of jokes taken too far.	Arab employees have been asked at work whether they were carrying bombs or were members of terrorist organizations.
Exclusion	Exclusion of certain people from job opportunities, social events, discussions, or informal mentoring; can occur unintentionally.	Many women in finance claim they are assigned to marginal job roles or are given light workloads that do not lead to promotion.
Incivility	Disrespectful treatment, including behaving in an aggressive manner, interrupting the person, or ignoring their opinions.	Women attorneys note that they are frequently cut off when speaking and that others do not adequately acknowledge their comments.

Sources: Based on J. Levitz and P. Shishkin, "More Workers Cite Age Bias After Layoffs," *The Wall Street Journal,* March 11, 2009, D1–D2; W. M. Bulkeley, "A Data-Storage Titan Confronts Bias Claims," *The Wall Street Journal,* September 12, 2007, A1, A16; D. Walker, "Incident With Noose Stirs Old Memories," *McClatchy-Tribune Business News,* June 29, 2008; D. Solis, "Racial Horror Stories Keep EEOC Busy," *Knight-Ridder Tribune Business News,* July 30, 2005, 1; H. Ibish and A. Stewart, *Report on Hate Crimes and Discrimination Against Arab Americans: The Post-September 11 Backlash, September 11, 2001–October 11, 2001* (Washington, DC: American-Arab Anti-Discrimination Committee, 2003); A. Raghavan, "Wall Street's Disappearing Women," *Forbes,* March 16, 2009, 72–78; and L. M. Cortina, "Unseen Injustice: Incivility as Modern Discrimination in Organizations," *Academy of Management Review* 33, no. 1 (2008): 55–75.

discrimination in organizations. Although many are prohibited by law and therefore are not part of organizations' official policies, the practices persist, and employees continue to report that they are discriminated against in the workplace.[52] Tens of thousands of cases of employment discrimination are documented every year, and many more go unreported. Since discrimination has increasingly come under both legal scrutiny and social disapproval, overt forms have tended to give way to more covert forms like incivility or exclusion, which can be just as perilous.[53]

Disparate Impact and Treatment As the first row in Exhibit 2-1 illustrates, discrimination may also transcend the behavior of one person. Collectively, organizations can engage in discriminatory practices as well. **Disparate impact** occurs when employment practices have a discriminatory effect on a legally protected group of people.[54] For instance, Title VII of the Civil Rights Act of 1964 prohibits employment discrimination based on race, ethnicity, gender identity, religion, and national origin, and the Age Discrimination in Employment Act (ADEA) prohibits employment discrimination against workers who are forty or older. Although disparate impact is unintentional (it focuses on the discriminatory "impact" of neutral employment practices), **disparate treatment** is intentional and represents employment practices intended to have a discriminatory effect on a legally protected group of people.[55] Organizations go to great lengths to avoid disparate impact, which can present substantial legal challenges if it occurs.[56] Managers and HR professionals are especially concerned with disparate impact during hiring, as often the best predictors of job performance (e.g., structured interviews and tests) also tend to be potentially discriminatory toward protected groups.[57] A great deal of research in HR and industrial psychology has focused on how to improve prediction and reduce discrimination in the hiring process.[58]

disparate impact When employment practices have an unintentional discriminatory effect on a legally protected group of people.

disparate treatment When employment practices have an intentional discriminatory effect on a legally protected group of people.

Because employees who perceive they are discriminated against feel higher levels of stress and injustice in their workplaces, discrimination can result in a number of negative outcomes for employees, including negative job attitudes and poor physical and psychological health outcomes.[59] Discrimination can also lead to increased negative consequences for employers, including reduced productivity and organizational citizenship behavior (OCB), more conflict, increased turnover, and even increased risk-taking behavior.[60] Unfair discrimination also leaves qualified job candidates out of initial hiring and promotions. Thus, even if an employment discrimination lawsuit is never filed, a strong business case can be made for aggressively working to eliminate unfair discrimination. After confronting prejudice, it is important to recognize that this can lead marginalized employees to a better outlook, increased job satisfaction, and post-confrontation relations with the person committing the prejudicial act.

You may have noticed that many of the discriminatory behaviors in Exhibit 2-1 are overt: for instance, harassment, mockery, and insults can be extreme direct manifestations of prejudice. As a newer form of disparate impact to emerge in recent decades, managers are increasingly relying on social media information to make staffing decisions. The issue is that employers who use social media information (e.g., reviewing candidates' Facebook, TikTok, or Instagram profiles to find more information about them) can end up becoming biased by their demographic characteristics, leading to disparate impact even when a structured, systematically administered questionnaire is used to rate the social media profiles.[61] As mentioned earlier, progress in legal protections against discrimination has led to an increase in more subtle forms of discrimination, which we discuss more in the next section.

Subtle Discrimination in the Workplace

Discrimination can occur in many ways, and its effects vary depending on organizational context and the personal biases of employees. Black and Hispanic pedestrians are more likely to be stopped, handcuffed, searched, and arrested by police. Black defendants are more likely to be prosecuted by judges. White students receive higher test scores from their teachers. And White patients receive preference for life-saving medical treatments.[62] However, some forms of discrimination—exclusion and incivility, for example—are especially hard to root out because they may be very difficult to detect or are relatively informal or because the people are not aware they are engaging in discriminatory behavior to begin with.[63] For instance, **microaggressions** are often referred to as automatic, subtle, stunning exchanges between people that negatively impact those with minority or marginalized backgrounds.[64] In the workplace, hundreds of research studies have uncovered subtle discrimination and microaggressions in very concerning occupations. Typically, these can take the form of *microinsults* (i.e., rudeness or insensitivity) or *microinvalidations* (i.e., language that excludes, nullifies, or negates the thoughts, feelings, or experience of others).[65]

microaggressions Automatic, subtle, stunning exchanges between people that negatively impact those with minority or marginalized backgrounds.

Whether it is overt or covert, intentional or unintentional, discrimination is one of the primary factors that prevent diversity. It may appear as if the impact of overt discrimination would be much larger than subtle discrimination on employees' job attitudes and health outcomes. However, subtle discrimination and microaggressions can be just as detrimental as more overt forms of discrimination, so organizations should be concerned with discrimination in all its forms.[66] Recognizing opportunities to reduce prejudice and discrimination, and increase diversity can lead to an effective diversity management program and ultimately to a better organization. The following section describes the major theories behind prejudice, discrimination, and diversity in organizations.

Theoretical Perspectives on Prejudice, Discrimination, and Diversity

2-3 Explain how four major theoretical perspectives contribute to our understanding of workplace diversity.

When many people think of diversity, they explicitly think in terms of representation and differentiation. Clearly, the implications for diversity go much further beyond that. Although understanding the way in which people differ and focusing on improving their representation in groups, teams, organizations, and positions of power are critically important, an understanding of how diversity influences everyday organizational interactions is just as important. In this section, we describe four highly influential perspectives on diversity that help paint a more complete picture of the complexity of diversity.

Social Categorization

Although many aspects of biographical characteristics are objective (e.g., age objectively represents the number of years a person has been on this earth), there is also a *subjective* and *perceptual* aspect. For instance, despite many people's claims to "not see color" and that they are "color-blind,"[67] all people engage in a number of cognitive processes to make sense of the world. During this process, our minds rely on *heuristics,* or mental shortcuts, to make processing the massive amounts of information we take in from the environment a little easier. Unfortunately, one of these processes is active in our interactions with other people and forms the basis for many of our biased judgments of others. **Social categorization** is a process through which people make sense of others by constructing *social categories,* or groups sharing similar characteristics.[68]

social categorization A process through which people make sense of others by constructing social categories, or groups sharing similar characteristics.

To note differences between people is not in itself necessarily bad. Noticing one employee is more qualified is necessary for making hiring decisions; noticing another is taking on leadership responsibilities exceptionally well is necessary for making promotion decisions. On the other hand, unfair social categorization assumes that everyone in a group is the same rather than looking at the characteristics of individuals within the group.

To make sense of social categorization, let's time-travel back to your days in secondary school. Take a brief walk around the school cafeteria or the mall after school, and you might come across students who instantly activate social categories. For instance, you might automatically categorize someone as a jock, an emo, or a goth based on their clothing (e.g., a high school letter jacket, an expensive brand-name polo shirt, an emo band logo hoodie, a black jumpsuit and makeup).[69] You may also associate these groups with different personality traits, with jocks as gregarious and outgoing and goths and emos more introverted and reclusive. But the category is not just in the eyes of outside perceivers—people themselves categorize themselves into groups and identify with those with whom they share characteristics.[70] Furthermore, people are driven to group together and forge identities with people with whom they share interests, values, and other characteristics.[71] These social categorization processes can lead people to separate and divide, forging a distinction between "us" (the *ingroup*) and "them" (the *outgroup*) and leading to bias as ingroup favoritism and outgroup derogation.[72]

Social categorization processes can affect OB in several ways. Social categorization can lead to the fragmentation of work groups and teams. As people associate with those more similar to themselves, form subgroups with those people, and judge others as belonging to outgroups, groups and teams can fracture, leading to lower team performance.[73] Unfortunately, social categorization may also lead people to make inferences about what others are like or are interested in that are not true, or they may even lead you to misclassify them as belonging to that group.[74] These incorrect inferences, as we discuss in the next section on stereotypes, are at the root of much of the prejudicial thinking that acts as a barrier to diverse and inclusive workplaces.

Stereotyping, Stereotype Threat, and Stigma

One extremely important theoretical source of prejudice in organizations is stereotyping. Through stereotyping, people may "typecast" others, or lump them into a category based on superficial, demographic characteristics. This process can lead those who are being stereotyped to experience stereotype threat and stigmatization.

stereotyping Judging someone based on one's perception of the group to which that person belongs.

Stereotyping People often allow their behavior to be influenced by stereotypes about *groups* of people. **Stereotyping** is judging someone based on our perception of the group to which that person belongs. To use a machine metaphor, you might think of stereotypes as the fuel that powers the discrimination engine. For instance, gender stereotypes can lead hiring managers to hire applicants who identify as men for jobs stereotypically thought of as "male-dominated."[75] Stereotypes can be insidious not only because they may lead to the formation of prejudice but also because they can affect how potential targets of discrimination see themselves.

Stereotype Threat Let's say you are sitting in a restaurant (perhaps the one where Hector and Bellamy work!), waiting to meet with recruiters from an organization where you want to work for an informal interview. How would you describe yourself to the recruiters so they could find you? What identifiable

characteristics would you mention so that they know a bit more about you and so that they can recognize you in the restaurant? Chances are good that you would mention something about what you are wearing or your hairstyle. Overall, you would give cues to the recruiters about characteristics that are *distinctive*, or that stand out, about you. However, with these characteristics follows the fear of being judged or treated negatively based on these superficial characteristics.

Stereotype threat describes the degree to which we are concerned with being judged by or treated negatively based on a certain stereotype.[76] For instance, an older worker applying for a job in a predominately millennial-age workforce may assume the interviewer thinks they are out of touch with current trends. What creates a stereotype threat is not whether the worker is or is not up-to-date with trends but whether they believe the interviewer will judge them based on this stereotype. People become their own worst enemies when they feel stereotype threat. Ironically, they may unconsciously exaggerate the stereotype.[77] Second, employees may engage in self-handicapping, in which they avoid effort so that they can attribute their potential failure to other sources, such as stress or "having a bad day."[78] Third, people may overcompensate for the stereotype threat they feel or work to avoid confirming the stereotype. Fourth, stereotype threat can serve as a "brain drain" for employees, causing them to deplete their working memories so that they do not perform as well on employment tests or training.[79]

stereotype threat The degree to which someone is concerned with being judged by or treated negatively based on a certain stereotype.

Stereotype threat has serious implications for the workplace. Stereotype threat can occur during preemployment tests and assessments, performance evaluations, and everyday workplace exchanges. It can lead to underperformance on tests, performance evaluations, training exercises, negotiations, and everyday interactions with others as well as to disengagement, poor job attitudes, a reluctance to seek feedback, and poor performance in the employees experiencing the threat.[80] We can combat it in the workplace by treating employees as individuals and not highlighting group differences. The following organizational changes can be successful in reducing stereotype threat: increasing awareness of how stereotypes may be perpetuated (especially when developing policies and practices), reducing differential and preferential treatment through objective assessments, confronting microaggressions against minority groups, and adopting transparent practices that signal the value of all employees.[81]

Stigma Sometimes, people are concerned with being judged by or treated negatively based on attributes or characteristics that are *not visible*. These people are aware that there are negative connotations associated with these characteristics and are thus motivated to hide or conceal them. **Stigma** represents attributes that cannot be readily seen, are concealable, and convey an identity that is devalued in certain social contexts.[82] When a perceiver becomes aware that another person possesses the stigmatized characteristic, they may draw on negative stereotypes surrounding that characteristic and respond in a prejudicial or discriminatory way toward that person. For instance, many workers have felt compelled to conceal their gender identities and sexual orientations in the workplace due to fear of repercussion and mistreatment. The Not Another Second exhibit in Brooklyn, New York, has provided twelve LGBTQ+ elders a chance to tell their stories of spending their lives concealing their sexual orientations, with many describing the psychological sting of hiding a part of their identities at work.[83] Furthermore, jobs themselves can be sources of stigma. For instance, studies exploring so-called "dirty work" show how stigma can be attached to occupations and result in the stigmatization of workers that do these jobs. For example, garbage collectors may attract the physical stigma of being viewed as dirty and disgusting, but debt collectors may have to deal with a moral stigma.[84]

stigma Attributes that cannot be readily seen, are concealable, and convey an identity that is devalued in certain social contexts.

Although the decision to disclose or conceal one's characteristics is a complex and personal one, research drawing on 108 studies of nearly 10,000 employees suggests that disclosure is more likely to lead to beneficial interpersonal, work, health, and family outcomes for certain stigma (e.g., gender identity, sexual orientation).[85] Of course, the decision to disclose stigma may not be a one-time decision—indeed, workers often have to make dozens of micro-decisions per day, in different contexts, as to whether to disclose. One study of LGBTQ+ workers found that there are immediate emotional consequences of concealment (reducing positive and increasing negative emotions) and identity expression (increasing positive and reducing negative emotions).[86] The ways in which people manage their stigma to others matter. For instance, employees who authentically discuss the positive features of the attribute that others may stigmatize may experience less ostracism and more support from their coworkers.[87]

Toward a Better World

Hot Chicken Takeover: Putting Restorative Justice into Practice

"Because we believe a crime record is often about circumstance, not character... we're giving an opportunity for somebody to demonstrate a different story for themselves." These words from Joe Deloss, the founder of Ohio-based restaurant chain Hot Chicken Takeover, demonstrate how some organizations are turning toward people who were formerly incarcerated or people with prior justice records as promising applicants. These "restored citizens" make up at least 70 percent of Hot Chicken Takeover's workforce. This second chance has resulted in dedicated, motivated, and very committed employees at Hot Chicken Takeover. Shannon Wilson, a Hot Chicken Takeover employee who works as its executive coordinator, recalls having "the door slammed in my face multiple times... when this opportunity came up... I was a better worker because that trust was instilled in me." Shannon was addicted to drugs for over a decade and spent nearly half of one in prison. When Shannon's sentence was through, Shannon had no money, clothes, or food. But Hot Chicken Takeover gave Shannon a second chance.

Society, not more than a decade ago, considered this practice a significant taboo. Today, surveys show that 78 percent of Americans feel comfortable interacting with workers who have previous nonviolent records. Further, only 14 percent of HR managers would never consider hiring them, and 82 percent of surveyed executives believe their restored citizen hires were just as successful as those without prior records or incarcerations. Research shows that people with previous records or incarcerations are much less likely to return to prison if they can obtain gainful employment. These initiatives have the support of the United States government and influential HR professional organizations. For instance, in December 2018, the First Step Act was signed into law with the Society for Human Resource Management's (SHRM) support, providing job training for restored citizens and encouraging organizations to recruit and hire people with prior records or incarcerations. Regardless of changing perceptions, there is still a heavy stigma associated with people with previous records or incarcerations. These individuals often have to engage in extra impression management during interviews, providing justifications and apologies for their behavior, even to the interviewer (who had nothing to do with what happened). Too often, the approach is punitive and completely ignores what happens afterward. *Restorative justice* suggests that the focus should be on making amends (i.e., redemption), forgiveness, and reintegration in the workplace. This concept ties in heavily to organizations' diversity, equity, and inclusion (DEI) strategies: enhancing diversity of the workforce, equity by giving people a second chance, and including them as valued members of organizations.

Of course, the decision to hire a person with a prior record or incarceration is not made within a vacuum. Managers must still critically evaluate the hiring decision, just as they would with any other employee. For instance, managers could consider the type of crime committed and the nature of the job to carefully weigh the decision. A nonviolent drug record is less likely to pose a risk unless the job is a position that requires safety compliance (e.g., drug addiction would pose a significant risk for a forklift operator). Timing and frequency matter as well—repeated, recent records are a greater cause for concern because they signal possible reoccurrence. The reoccurrence rate for violence and homicide is lower than any other crime. Still, many would feel uncomfortable working alongside someone

Continued

who was previously incarcerated for sexual assault, highlighting the importance of the nature of the crime and the workplace context. Furthermore, prior records of dishonesty (e.g., burglary, theft, fraud) tend to be associated with a high reoccurrence rate. Managers should exercise caution in giving financial access privileges to these restored citizens.

Managers should also consider the national cultural and legal context behind their decision. For instance, although there is government support in the United States for these practices, the Equal Employment Opportunity Commission (EEOC) has specific guidelines to follow. Suppose employers treat applicants with prior records or incarcerations from underrepresented groups differently than other applicants. In that case, they could be charged with discrimination. In other countries, opportunities for restorative justice depend on background check laws. For instance, in Australia, France, Germany, and the UK, minor records of applicants who have already served their sentence (with a set amount of time passed since the conviction) are considered "spent." Employers legally cannot ask or inquire about them.

Hot Chicken Takeover and other organizations' practices reflect a shift toward realizing DEI goals in the world of work. The careful practice of restorative justice in employment practices poses an opportunity for organizations to make the world a better place. Giving people with prior records or incarcerations a second chance extends an opportunity for them to rejoin their community as valued and productive members of society.[88]

System Justification and Social Dominance

Although the theories we have discussed so far have primarily focused on people's thinking about others, social dominance and system justification turn the focus toward the context. These theories concern why some people accept, justify, or even support prejudicial or discriminatory ideologies in the workplace.

System Justification **System justification theory** suggests that group members may often accept, rationalize, legitimate, or justify their experiences with inequality, prejudice, and discrimination compared with other groups.[89] In other words, over time, "the ideas of the dominant tend to become the ideas of the dominated."[90]

system justification theory The theory that group members often accept, rationalize, legitimate, or justify their experiences with inequality, prejudice, or discrimination.

For instance, in one study, those who learned about societal, systemic barriers to executive leader success for people identifying as women were more likely to view these barriers as legitimate than those who did not learn that information at all.[91] Why do many people accept their negative experiences when it may be in their (and their organizations') best interests to address them directly? System justification might be due to group members' belief in a just and fair world, a motivation to reduce the uncomfortable inconsistency between what they deserve and what they get, and the extreme difficulty of challenging the authority and credibility of organizations.[92] Moreover, system justification thrives when people believe that they have low personal control, that the situation is inescapable, and that they depend on or are grateful to the system (and do not want to jeopardize the relationship).[93] However, research shows that thought patterns of system justification can be addressed; for instance, one study found that shifting one's attention directly toward the restrictive nature of the inequality broke these thought patterns.[94]

Social Dominance We have discussed why some may rationalize or accept the inequality they experience. But why do some people seem to outright condone it? Social dominance theory may provide an explanation. **Social dominance theory** suggests that prejudice and discrimination are based on a complex hierarchy, with one group dominating over another and the dominating group enjoying privilege not afforded to the subordinate group.[95] In turn, people vary in the degree to which they believe in the theory; *social dominance orientation (SDO)* reflects whether people desire and support this hierarchy and whether they believe that some groups are inferior and others are superior.[96] Many

social dominance theory The theory that prejudice and discrimination are based on a complex hierarchy, with one group dominating another and the dominating group enjoying privilege not afforded to the subordinate group.

researchers have suggested that an individual's SDO is one of the most important predictors of whether they hold prejudicial beliefs or discriminate against others. Similar to system justification, people may hold SDO beliefs as a way to legitimize inequality, believe in a just and fair world, and justify one's privileged position at the expense of others.[97] Further, for those with a high SDO, increases in diversity may seem to threaten their place in the hierarchy, leading to prejudice and discrimination.[98]

Social dominance theory has a number of implications for organizations. For instance, applicants with a high SDO tend to be attracted to organizations of people who are similar to themselves and share in their high status.[99] These applicants are also repelled from more diverse organizations, or organizations composed of low-status individuals. Furthermore, managers with a high SDO tend to be less likely to hire individuals from low-status groups.[100] Taken together, SDO affects both *managers'* discriminatory hiring decisions and *applicants'* prejudiced decisions to pursue employment in diverse organizations. While on the job, managers with a higher SDO judge low-status individuals' job performance more harshly and less warmly, especially when they are perceived as obtaining special treatment.[101]

Next, we turn from explanations of prejudice and discrimination toward an enhanced understanding of how individuals contribute to workplace diversity.

Intersectionality and the Cultural Mosaic

People are complex. It can be extremely difficult to describe even a single person's demographic and cultural makeup in simple terms. Given this complexity, it makes sense that diversity theory should unpack this complexity and understand its implications for organizational outcomes. In this section, we describe intersectionality and cultural mosaic theory, two perspectives toward understanding the complex relationship between diversity and organizational behavior.

Intersectionality In the 2018 U.S. Open Finals, professional tennis grand champion Serena Williams was penalized several times in an escalating argument with the umpire.[102] Serena, along with many other experts and officials, believed that the penalties were unduly harsh when compared with penalties that have been historically levied toward men.[103] As Wharton organizational psychologist Adam Grant notes, "When a man argues with an umpire, it's passion. When a woman does it, it's a meltdown. When a Black woman does it, it's a penalty".[104] Grant's comment demonstrates that we are not merely the sum of our characteristics (e.g., middle-aged, Black, transgender) but rather a multiplicative combination of characteristics[105] that sometimes interact with or counteract one another. This **intersectionality**, or the idea that identities interact to form different meanings and experiences,[106] highlights the complexity in understanding diversity in organizations and recognizes that social categories themselves may not be enough to understand individuals' unique contributions to their organizations.

intersectionality The idea that identities interact to form different meanings and experiences.

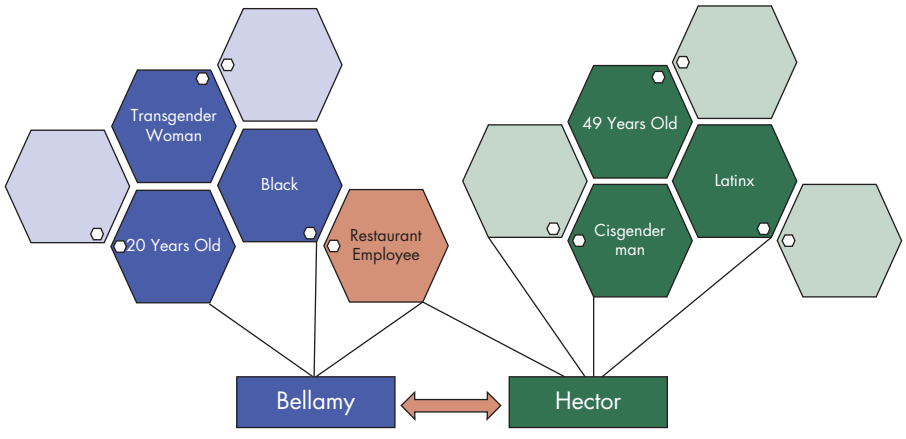
Intersectionality can unfortunately lead to enhanced negative effects for people with multiple stigmatized characteristics, also referred to as *double jeopardy*. Research has demonstrated that minority women, for instance, experience more workplace harassment,[107] experience hiring discrimination,[108] and are penalized more heavily as leaders[109] than minority workers and women workers separately. Double jeopardy effects occur when negative stereotypes associated with multiple categories are activated, leading to more negative effects than among members of just one of the categories.

Diversity as a Cultural Mosaic When it comes to intersectionality, there is so much more to people than considering the intersection between two demographic characteristics at a time (e.g., gender identity and age). Indeed, people are made up of multiple intersections and combinations of characteristics that make them uniquely who they are—and that affect their interactions with similarly unique others.[110] For instance, OB theorists have suggested the metaphor of a *cultural mosaic*: that people are made up of multiple characteristics, attributes, and identities that can be used to describe people.[111] The tiles of a person's mosaic can be biographical or demographic (e.g., age, race, ethnicity, gender identity), geographical (e.g., the climate, temperature, location), or associative (e.g., employer, religion, political affiliation, hobbies). Together, theorists have outlined fifteen *sample* tiles comprising an individual's mosaic, which could result in at least 105 unique intersections between characteristics. Consider Exhibit 2-2 for an illustration of cultural mosaic theory. As we described in an example at the beginning of the chapter, both Bellamy and Hector are composed of a number of "tiles" that contribute to who they are. These tiles influence how Hector and Bellamy interact with one another. Furthermore, Bellamy and Hector may even share tiles, such as their shared employer (the restaurant where they work).

Similar to the SDO described previously, workers may also hold *cultural mosaic beliefs* (CMB) that influence their support for diversity, acceptance, and inclusion of people from different backgrounds.[112] Furthermore, workers may choose to emphasize some of the tiles in their mosaics more so than the others, depending upon the setting (e.g., at home versus at work).[113] In general, a review of the effects of taking this multicultural approach to diversity (covering nearly 300 separate studies) in the workplace uncovered uniformly positive effects: It reduced prejudice, discrimination, and stereotyping and even increased support for diversity policies.[114]

Returning to the example of Hector and Bellamy, consider the number of employees who may be working at the restaurant. Bellamy and Hector likely interact with dozens of other employees, each constituting their own unique mosaics of characteristic tiles. Clearly, there are so many ways in which organizations can be diverse and in which diversity can influence common, everyday

Exhibit 2-2 The Cultural Mosaic



Source: Adapted from G. T. Chao and H. Moon, "The Cultural Mosaic: A Metatheory for Understanding the Complexity of Culture," *Journal of Applied Psychology* 90, no. 6 (2005): 1128–40.

workplace interactions. In the next section, we describe how diversity plays a role in these interactions, both between individuals and as members of a group.

Diversity Dynamics

2-4 Describe the role diversity plays in the interactions between people.

So far, we have highlighted the role diversity plays for workers and managers in organizations. Indeed, discrimination and diversity perspectives can lead to negative and positive organizational outcomes, respectively. However, we have not delved into how diversity affects behavior within groups and teams. In this section, we discuss the role that group composition and fault lines play in our understanding of diversity in the workplace.

Group Composition

A common dilemma that managers and team leaders face in the world of work is how to build a team.[115] We have already established that people are complex mosaics—naturally, groups and teams are inherently diverse collections of people working toward common goals. We have also established that people naturally group together, clustering into groups of people with shared characteristics and interests. When they have the choice to establish relationships on their own terms, they tend to be higher-quality relationships characterized by trust.[116] The question becomes how should managers, knowing that people are different, build teams to increase performance and cohesion and reduce conflict?

Overall, studies tend to be inconclusive and depend on how diversity is indexed and conceptualized.[117] Interestingly, there is only a modest link between *actual* diversity and *perceived* diversity, and some research suggests that members seek to balance a need to belong and a need to be distinctive in groups. Perceived dissimilarity and underrepresentation between yourself and the group you belong to tend to lead to negative outcomes.[118] Differences between the group/team and its leader also matter, with justice perceptions (see the chapter on motivation applications) playing a strong role.[119] Furthermore, recent research has become more interested in the effects of diversity in groups over time: how group and team diversity changes and evolves.[120] After all, it is unlikely that the same work group or team stays together indefinitely.

Despite the inconclusive nature of research on group composition, a number of findings have emerged about *surface-level, deep-level,* and *functional diversity* in groups and teams. Surface-level diversity appears to increase group conflict, especially in the early stages of a group's tenure, which often lowers group morale and raises group turnover.[121] Group members from various biographical backgrounds tend to come to the team with a different understanding of the task, norms, and goals—in other words, they are often not "on the same page," making it difficult to coordinate initially.[122] One study compared groups that were culturally diverse and homogeneous (composed of people from the same country). On a virtual wilderness survival test, the groups performed equally well, but the members from the diverse groups were less satisfied with their groups, were less cohesive, and had more conflict.[123] Group outsiders are even more likely to be biased toward racially heterogeneous groups and allocate fewer resources toward them.[124]

At a deeper level, groups in which members' values or opinions differ tend to experience more conflict, but leaders who can get the group to focus on the task at hand and encourage group learning are able to reduce these conflicts and enhance discussion of group issues.[125] Research in Korea indicates that putting people with a high need for power (nPow; see Chapter 8) with those with a low need for power can reduce unproductive group competition, whereas

putting individuals with a similar need for achievement may increase task performance.[126] Furthermore, diversity in how likely group members are willing to trust one another can fuel conflict and further erode trust over time.[127]

On the other hand, "functional" diversity, or differences in skills, abilities, experiences or other characteristics needed for the job, may improve team performance and innovation, but these effects are contingent on several factors.[128] For example, functional diversity can influence team creativity by facilitating knowledge sharing.[129] Further, new ventures led by functionally diverse teams of founders tend to be more successful in competitive environments.[130]

Although differences can lead to conflict, they also provide an opportunity to solve problems in unique ways. Diverse groups may be less likely to fall into conformity and more likely to deliberate longer, share more information, and make fewer factual errors.[131] Altogether, it is difficult to be in a diverse group in the short term. They tend to homogenize over time, they are fragile, and they tend to be prone to fragmentation.[132] However, if members can weather their differences, over time diversity may help them be more open-minded and creative and to perform better. For example, research into the development of identification in diverse UN peacebuilding teams across the world shows that team members develop a sense of identification but that this evolves over time.[133]

Fault Lines

One possible side effect in diverse teams—especially those that are diverse in terms of surface-level characteristics—is **fault lines**, or perceived divisions that split groups into two or more subgroups based on individual differences such as sex, race, age, work experience, language, and education.[134] As we discussed in the prior section, social categorization can lead members of groups to form subgroups, leading to the fracture of the group as a cohesive unit.

fault lines The perceived divisions that split groups into two or more subgroups based on individual differences such as gender, race, and age.

For example, let's say a group is composed of three Black and three Hispanic employees. The three Hispanic employees have approximately the same amount of work experience and backgrounds in marketing. The three Black employees have about the same amount of work experience and backgrounds in finance. It is thus likely that a fault line will result in the subgroups of Black and Hispanic employees in this group based on their differentiating characteristics.

Research on fault lines has shown that they are generally detrimental to group functioning and performance. Subgroups may compete, which takes time away from core tasks and harms group performance, especially when the group is under threat.[135] Groups that have subgroups learn more slowly, make riskier decisions, are less creative, and experience higher levels of conflict. Subgroups may not trust each other and may have low levels of cohesion.[136] Finally, satisfaction within subgroups is generally high, but the overall group's satisfaction is lower when fault lines are present.[137] Are fault lines ever a good thing? One study suggested that fault lines regarding skill, knowledge, and expertise may be beneficial in a results-driven organizational culture. Why? A results-driven culture focuses people's attention on what is important to the company rather than on problems arising from subgroups.[138]

How can fault lines be addressed or harnessed for good within organizations? Studies show that problems stemming from strong fault lines may be overcome when the roles are crosscut, when the group is given a common goal to strive for, and when similar pairs are recruited within a diverse group. Altogether, forced collaboration between members of subgroups and focus on accomplishing a goal may boost performance in certain organizations.[139] Pro-diversity beliefs and open-mindedness norms also help (and training can help improve this when they are low);[140] for example, one study of international diplomats

with the German Ministry of Foreign Affairs suggests that diplomat and team pro-diversity beliefs reduce the negative effect of fault lines on performance.[141] Similarly, research on multicultural groups suggests that policies, practices, and procedures that welcome and accept diversity and that assume a diversity in thought lead to an effective exchange of thoughts and more effective teams.[142]

Cross-Cultural Organizational Behavior (OB)

2-5 Discuss the implications of cross-cultural matters for organizational behavior (OB).

We have seen that people sometimes define themselves in terms of race and ethnicity. Many people carry a strong *cultural identity* as well, a link with the culture of family ancestry, values, and religion that lasts a lifetime, no matter where the individual may live in the world. People choose their cultural identity, and they also choose how closely they observe the norms of that culture. Cultural norms influence the workplace, sometimes resulting in clashes or fostering alienation among cultural minorities. They are especially important for understanding the international assignments of expatriates in countries outside their home country (and what makes them fail or succeed in those environments). For example, in the best-selling novel *Native Speaker,* Henry Park is a Korean American industrial spy who must cope with competing cultural identities—Park's job requires interaction with multiple people, and Park struggles with whether to act "more Korean" or "more American" depending on to whom he is assigned.[143]

Cultural values are learned. They are passed down through generations and vary by cultures. As researchers have sought to understand cultural value differences, two important frameworks that have emerged are from Geert Hofstede and the GLOBE studies.

power distance A national culture attribute that describes the extent to which a society accepts that power in institutions and organizations is distributed unequally.

individualism A national culture attribute that describes the degree to which people prefer to act as individuals rather than as members of groups.

collectivism A national culture attribute that describes a tight social framework in which people expect others in groups of which they are a part to look after them and protect them.

masculinity A national culture attribute that describes the extent to which the culture favors traditional masculine work roles of achievement, power, and control. Societal values are characterized by assertiveness and materialism.

femininity A national culture attribute that indicates little differentiation between male and female roles; a high rating indicates that women are treated as the equals of men in all aspects of the society.

uncertainty avoidance A national culture attribute that describes the extent to which a society feels threatened by uncertain and ambiguous situations and tries to avoid them.

Hofstede's Framework

One of the most widely referenced approaches for analyzing variations among cultures was introduced in the late 1970s by Geert Hofstede.[144] Hofstede surveyed more than 116,000 IBM employees in forty countries about their work-related values and found that managers and employees varied on five value dimensions of national culture:

- *Power distance.* **Power distance** describes the degree to which people in a country accept that power in institutions and organizations is distributed unequally. A high rating on power distance means large inequalities of power and wealth exist and are tolerated in the culture, as in a class or caste system that discourages upward mobility. A low power distance rating characterizes societies that stress equality and opportunity.
- *Individualism versus collectivism.* **Individualism** is the degree to which people prefer to act as individuals rather than as members of groups and believe in an individual's rights above all else. **Collectivism** emphasizes a tight social framework in which people expect others in groups of which they are a part to look after them and protect them.
- *Masculinity versus femininity.* Hofstede's construct of **masculinity** is the degree to which the culture favors traditional masculine roles such as achievement, power, and control, as opposed to viewing men and women as equals. A high masculinity rating indicates that the culture has separate roles for men and women, with men dominating the society. A high **femininity** rating means the culture sees little differentiation between male and female roles and treats women as the equals of men in all respects.
- *Uncertainty avoidance.* The degree to which people in a country prefer structured over unstructured situations defines their **uncertainty avoidance**.

In cultures scoring high on uncertainty avoidance, people have increased anxiety about uncertainty and ambiguity and use laws and controls to reduce uncertainty. People in cultures low on uncertainty avoidance are more accepting of ambiguity, are less rule oriented, take more risks, and accept change more readily.

- *Long-term versus short-term orientation.* All societies vary in their focus on meeting the challenges of the present and future as opposed to maintaining a link with their past. **Long-term-oriented cultures** tend to assume that preparation for the future is needed because the world is constantly changing. These cultures tend to value thrift, persistence, and pragmatism to prepare for the future. On the other hand, **short-term-orientated cultures** prefer to maintain a link to their past by honoring traditions, fulfilling social obligations, and upholding and protecting their image.

long-term orientation A national culture attribute that emphasizes the future, thrift, and persistence.

short-term orientation A national culture attribute that emphasizes the past, honors traditions, and upholds its image.

In recent years, Hofstede has proposed an additional dimension, *indulgence versus restraint*, which refers to a national culture attribute that emphasizes enjoying life and having fun versus regulating conduct through strict social norms.[145] Although it is fairly new as a dimension, some research supports its distinction from other values and shows that it is correlated with a society's level of prosociality.[146]

How do different countries score on Hofstede's dimensions? Exhibit 2-3 shows the ratings of the countries for which data are available. For example, power distance is higher in Malaysia than in any other country. The United States is very individualistic; in fact, it is the most individualistic nation of all (closely followed by Australia and Great Britain). Guatemala is the most collectivistic nation. The country with the highest masculinity rank by far is Japan, and the country with the highest femininity rank is Sweden. Greece scores the highest in uncertainty avoidance, while Singapore scores the lowest. Hong Kong has one of the longest-term orientations; Pakistan has the shortest-term orientation.

Research across 598 studies with more than 200,000 respondents has investigated the relationship of Hofstede's cultural values and a variety of organizational criteria at both the individual and national level of analysis.[147] Overall, the five original culture dimensions were found to be equally strong predictors of relevant outcomes. In sum, this research suggests that Hofstede's framework may be a valuable way of thinking about differences among people, but we should not assume all people from a country have the same values.

The GLOBE Framework

Founded in 1993, the Global Leadership and Organizational Behavior Effectiveness (GLOBE) research program is an ongoing cross-cultural investigation of leadership and national culture. Using data from 951 organizations in sixty-two countries, the GLOBE team built upon Hofstede's work by identifying nine dimensions on which national cultures differ.[148] Some dimensions—such as power distance, individualism/collectivism, uncertainty avoidance, gender differentiation (like masculinity versus femininity), and future orientation (like long-term versus short-term orientation)—resemble the Hofstede dimensions (although they are defined differently in some cases). Beyond these, the GLOBE framework added to or otherwise split the Hofstede dimensions, such as humane orientation (the degree to which a society rewards individuals for being altruistic, generous, and kind to others) and performance orientation (the degree to which a society encourages and rewards group members for performance improvement

Exhibit 2-3 Hofstede's Cultural Values by Nation

	Power Distance		Individualism versus Collectivism		Masculinity versus Femininity		Uncertainty Avoidance		Long- versus Short-Term Orientation	
Country	Index	Rank	Index	Rank	Index	Rank	Index	Rank	Index	Rank
Argentina	49	35–36	46	22–23	56	20–21	86	10–15		
Australia	36	41	90	2	61	16	51	37	31	22–24
Austria	11	53	55	18	79	2	70	24–25	31	22–24
Belgium	65	20	75	8	54	22	94	5–6	38	18
Brazil	69	14	38	26–27	49	27	76	21–22	65	6
Canada	39	39	80	4–5	52	24	48	41–42	23	30
Chile	63	24–25	23	38	28	46	86	10–15		
Colombia	67	17	13	49	64	11–12	80	20		
Costa Rica	35	42–44	15	46	21	48–49	86	10–15		
Denmark	18	51	74	9	16	50	23	51	46	10
Ecuador	78	8–9	8	52	63	13–14	67	28		
El Salvador	66	18–19	19	42	40	40	94	5–6		
Finland	33	46	63	17	26	47	59	31–32	41	14
France	68	15–16	71	10–11	43	35–36	86	10–15	39	17
Germany	35	42–44	67	15	66	9–10	65	29	31	22–24
Great Britain	35	42–44	89	3	66	9–10	35	47–48	25	28–29
Greece	60	27–28	35	30	57	18–19	112	1		
Guatemala	95	2–3	6	53	37	43	101	3		
Hong Kong	68	15–16	25	37	57	18–19	29	49–50	96	2
India	77	10–11	48	21	56	20–21	40	45	61	7
Indonesia	78	8–9	14	47–48	46	30–31	48	41–42		
Iran	58	29–30	41	24	43	35–36	59	31–32		
Ireland	28	49	70	12	68	7–8	35	47–48	43	13
Israel	13	52	54	19	47	29	81	19		
Italy	50	34	76	7	70	4–5	75	23	34	19
Jamaica	45	37	39	25	68	7–8	13	52		
Japan	54	33	46	22–23	95	1	92	7	80	4
Korea (South)	60	27–28	18	43	39	41	85	16–17	75	5
Malaysia	104	1	26	36	50	25–26	36	46		
Mexico	81	5–6	30	32	69	6	82	18		
The Netherlands	38	40	80	4–5	14	51	53	35	44	11–12
New Zealand	22	50	79	6	58	17	49	39–40	30	25–26
Norway	31	47–48	69	13	8	52	50	38	44	11–12
Pakistan	55	32	14	47–48	50	25–26	70	24–25	0	34
Panama	95	2–3	11	51	44	34	86	10–15		
Peru	64	21–23	16	45	42	37–38	87	9		
Philippines	94	4	32	31	64	11–12	44	44	19	31–32
Portugal	63	24–25	27	33–35	31	45	104	2	30	25–26
Singapore	74	13	20	39–41	48	28	8	53	48	9
South Africa	49	35–36	65	16	63	13–14	49	39–40		
Spain	57	31	51	20	42	37–38	86	10–15	19	31–32
Sweden	31	47–48	71	10–11	5	53	29	49–50	33	20
Switzerland	34	45	68	14	70	4–5	58	33	40	15–16
Taiwan	58	29–30	17	44	45	32–33	69	26	87	3
Thailand	64	21–23	20	39–41	34	44	64	30	56	8
Turkey	66	18–19	37	28	45	32–33	85	16–17		
United States	40	38	91	1	62	15	46	43	29	27
Uruguay	61	26	36	29	38	42	100	4		
Venezuela	81	5–6	12	50	73	3	76	21–22		
Yugoslavia	76	12	27	33–35	21	48–49	88	8		
Regions:										
Arab countries	80	7	38	26–27	53	23	68	27		
East Africa	64	21–23	27	33–35	41	39	52	36	25	28–29
West Africa	77	10–11	20	39–41	46	30–31	54	34	16	33

Note: "Index" refers to the given country's score on the dimension, 0 = extremely low to 100 = extremely high. "Rank" refers to the relative ranking of the country compared to the others in Hofstede's database, with 1 = the highest rank.

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and excellence). In Exhibit 2-4, the linkages between the dimensions from the GLOBE framework and Hofstede's dimensions are outlined. As can be seen in the exhibit, the GLOBE program also differentiated between these dimensions as they relate to practices (what is currently done) and values (what the society idealizes and aspires toward).

Exhibit 2-4 Hofstede–GLOBE Comparison

Hofstede's Dimensions	GLOBE
Power distance: Extent to which a society accepts an unequal distribution of power	**Power distance:** Extent to which a society accepts an unequal distribution of power
Uncertainty avoidance: Extent to which a society feels threatened by and avoids ambiguity	**Uncertainty avoidance:** Extent to which a society seeks orderliness, structure, and laws to avoid ambiguity
Long-term orientation: Extent to which a society emphasizes the future and persistence (versus the present and change)	**Future orientation:** Extent to which a society believes its actions can influence the future
Collectivism: Extent to which a society emphasizes acting as a tight-knit collective (versus as independent individuals)	**Institutional collectivism:** Extent to which a society supports collective action and resource distribution **Ingroup collectivism:** Extent to which a society values loyalty, pride, patriotism, and cohesion
Masculinity: Extent to which a society favors traditional masculine roles such as power and control (versus little differentiation of gender roles)	**Gender egalitarianism:** Extent to which a society deemphasizes traditional gender roles **Assertiveness:** Extent to which a society emphasizes confidence and advocating for what one wants
	Humane orientation: Extent to which a society values caring, friendliness, altruism, fairness, kindness, and generosity
	Performance orientation: Extent to which a society values producing results, excellence, and productivity

Source: Adapted from R. Hadwick, "Should I Use GLOBE or Hofstede? Some Insights That Can Assist Cross-Cultural Scholars, and Others, Choose the Right Study to Support Their Work," paper presented at Australian & New Zealand Academy of Management, Wellington, NZ (December 2011); R. J. House, P. J. Hanges, M. Javidan, P. W. Dorfman, and V. Gupta, *Culture, Leadership, and Organizations: The GLOBE Study of 62 Societies* (Thousand Oaks, CA, 2004): X. Shi Sage and J. Wang, "Interpreting Hofstede Model and GLOBE Model: Which Way to Go for Cross-Cultural Research?" *International Journal of Business and Management* 6, no. 5 (2011): 93–99.

Both frameworks have a great deal in common and lead to similar conclusions. For example, a review of the organizational commitment literature shows both the Hofstede and GLOBE individualism/collectivism dimensions operated similarly. Specifically, both frameworks showed that organizational commitment tends to be lower in individualistic countries.[149] However, GLOBE expands upon the Hofstede framework in a number of ways. For example, as can be seen in Exhibit 2-4, various aspects of the cultural values are disentangled into narrower dimensions. Regardless, these dimensions of cultural values are incredibly important to be aware of in this day and age. With the advent of globalization, companies often engage in multinational projects, work in multinational teams, and send their employees to work in different cultures that may be radically different than what they are used to. Understanding what is valued (and what is not valued) in each culture is very "valuable" information to have today.[150]

Cultural Tightness and Looseness

Although we have discussed differences in values between cultures quite a bit, cultures can also vary in the strength of their norms. Similar to the concept of *situational strength,* which we discuss in the individual differences and values chapter, **cultural tightness–looseness** refers to the degree to which there are clear, pervasive norms within societies, a clear understanding of sanctions for violating those norms, and no tolerance for deviating from those norms.[151]

cultural tightness–looseness The degree to which there are clear, pervasive norms within societies, a clear understanding of sanctions for violating those norms, and no tolerance for deviating from those norms.



According to Hofstede's framework, many Asian countries have a strong collectivist culture that fosters a team-based approach to work. These employees in a department store outlet in Busan, South Korea, are likely to consider the success of their team as more important than personal success on the job.
Source: Yonhap News/YNA/Newscom

Culturally tight countries have historically experienced a great deal of threat, which has led to the emergence of clear, strong norms. For example, Japan is one of the countries most prone to natural disasters in the world;[152] it makes sense that living under the constant threat of disaster requires tight norms and rules to coordinate and survive.[153] On the other hand, loose countries like the United States tend to be more ambivalent toward restrictions to autonomy and liberty. As Michele Gelfand, the theorist behind cultural tightness–looseness, described, "The coronavirus response so far echoes [the United States'] loose cultural programming. It's been conflicted. It's been unstandardized, it's been uncoordinated."[154] Cultural tightness tends to influence whether high-performance HR systems are more or less effective. In tight cultures, there are strong norms in place, and so workers are motivated to follow them—as such, when rigorous hiring systems, training programs, reward systems, and participative decision-making practices are enacted by organizations, they tend to be successful because workers tend to implement the practices.[155]

Religion

Faith and religion are a big part of people's cultures and can be an employment issue wherever religious beliefs prohibit or encourage certain behaviors. There are few—if any—countries in which religion is a nonissue in the workplace. For this reason, employers are prohibited by law from discriminating against employees based on religion in many countries, including Australia, the United Kingdom, and the United States.[156] Reasonable accommodation, like that stipulated in the Americans with Disabilities Act (ADA) (see the chapter on HR policies), is also required for religious exemptions in the United States. For example, one jury awarded millions of dollars to Marie Pierre, a dishwasher at a Miami hotel, who was not accommodated (allowed to swap shifts) for needing to request Sundays off for religious reasons.[157] Religious discrimination has been a growing source of discrimination claims in the United States, partially because the issues are complex. Recently, Samantha Elauf, who was turned

down for employment for wearing a hijab (a headscarf), sued for religious discrimination. "I learned I was not hired by Abercrombie because I wear a head scarf, which is a symbol of modesty in my Muslim faith," Samantha said.[158] Discrimination cases like this have also been observed in research; for example, one study found that job applicants in Muslim-identified religious attire who applied for hypothetical retail jobs had shorter, more interpersonally negative interviews than applicants who did not wear Muslim-identified attire.[159]

Expatriate Adjustment

As described in the opening chapter, the experience of moving to a different country and adjusting to its new cultural, interactive, and work-related norms is a major undertaking for both the expatriate (i.e., the employee on international assignment) and the host country nationals. For example, many expatriates are extremely concerned with host country nationals' receptiveness to their sexual orientations.[160] If international assignments are not handled properly and carefully, poor adjustment can result in employee dissatisfaction, poor performance, prejudice, and misunderstanding.[161] Several factors can be targeted to ensure that the adjustment process goes smoothly. For one, feelings of empowerment along with the motivation to interact with those of other cultures were found in one study to be related to ease of adjustment, increased satisfaction, and reduced intentions to leave prematurely.[162] Although adjustment tends to increase over time for all expatriates, those with previous culture-specific work experience as well as higher self-esteem and self-efficacy tend to adjust and be promoted more quickly.[163] A review of sixty-six studies on nearly 9,000 expatriates suggests that several other factors work in concert to affect different forms of adjustment, including language ability, relational skills, role clarity and autonomy, organizational support, and familial support.[164] Finally, cultural tightness–looseness matters: Nearly all expatriates will have a difficult time adapting to tight countries because they have to adapt to strongly observed, heavily enforced norms.[165] These studies suggest that organizations should select employees for international assignments who are capable of adjusting quickly and then ensure they have the support they need for their assignment.

Cultural Intelligence (CQ)

Similar to the concept of emotional intelligence (EQ) discussed in the chapter on emotions and moods is **cultural intelligence (CQ)**, which is a worker's ability to effectively function in culturally diverse settings and situations.[166] Consider two executives at a global networking event.[167] The first executive, from Brazil, engages in conversation with an executive from Australia. The Brazilian executive stands in close proximity to the Australian and touches the Australian's shoulder frequently. The Australian executive, uncomfortable with the close proximity and touching, keeps backing away, and it takes nearly a half hour for the Brazilian executive to realize what is happening. In this situation, a high CQ would involve understanding not only the cultural differences between the two executives but also an ability to perceive and adapt to the situation quickly to avoid cultural mishaps.[168]

cultural intelligence (CQ) A worker's ability to effectively function in culturally diverse settings and situations.

CQ has been found to be associated with expatriate career aspirations and adjustment, job performance, psychological health and well-being, cross-cultural leadership, negotiation performance, and OCB in organizations.[169] Furthermore, a study of real estate agents found that CQ predicted sales to culturally dissimilar clients, especially when their agency was supportive of diversity initiatives.[170] CQ has motivational effects that influence worker performance. For instance, individuals with high CQ feel more comfortable voicing their ideas with culturally dissimilar peers and supervisors.[171]

In developing your own CQ, you may want to keep two things in mind. First, research shows that executives' experiences in multinational firms tend to predict their ability to manage international affairs when they are broad and general in nature.[172] Specific experiences themselves do not predict the ability to manage international affairs. As such, the "cultural generalists" who acquire a broad range of experiences tend to be more effective than the "cultural specialists." Second, in preparing to develop your own CQ, it may be beneficial to adopt a multicultural openness. For instance, exchange students who held an "us versus them" mentality (see the earlier section on social categorization theory) tended to be more sensitive to cultural rejection by host country nationals while studying abroad, which subsequently affected their adjustment to the new culture *and* the development of their CQ.[173]

Beyond enhancing CQ, workers, managers, and organizations can effectively manage diversity in their organizations in a number of ways. In the next section, we describe the opportunities and challenges of diversity management in organizations.

Implementing Diversity Management

2-6 Describe how organizations manage diversity effectively.

Having discussed a variety of ways in which people differ, we now look at how organizations can manage these differences. **Diversity management** involves the use of evidence-based strategies to manage and leverage the inherent diversity of the workforce.[174]

diversity management The use of evidence-based strategies to manage and leverage the inherent diversity of the workforce.

However, a focus on diversity alone is not enough.[175] The theory and research we have reviewed up to this point paint a bigger picture of prejudice, discrimination, and cultural misunderstanding that a mere understanding of diversity may fall short of addressing. Instead, organizations would do well to broaden their scope to focus on what can be done to ameliorate inequity, unfairness, and exclusion.

As a result, organizations have begun to focus on *diversity, equity*, and *inclusion* (DEI) as three strategic and principled goals to strive toward.[176] First, a focus on *diversity* involves celebrating rather than denigrating the differences between people and enhancing the representation of diverse, marginalized people in the workforce. Many of the topics we have discussed so far have focused on these issues.

equity Striving to provide access to the same opportunities for all workers, recognizing that some people are afforded privileges while others are confronted with barriers.

Second, a focus on **equity** involves striving to provide access to the same opportunities for all workers, recognizing that some people are afforded privileges and advantages while others are confronted with barriers and obstacles.[177] A commitment to equity involves a commitment to equal opportunity and reducing prejudice and discrimination. Equity strategies include, for instance, broadly engaging with and collaborating with diverse communities, critiquing unjust structures, building coalitions, and education on inequity.[178]

In the United States, the Equal Employment Opportunity Commission (EEOC), following the Civil Rights Act of 1964, was established to ensure equal opportunity during the employment process, so that people are treated fairly without regard to their protected individual differences. In the United States, when some think of equity, they may think of *affirmative action*. Affirmative action is often misunderstood. Affirmative action in the United States does not involve quotas for minority groups (which have been ruled unconstitutional) but, rather, good-faith efforts to recruit, select, and train qualified minorities to enhance representation and fair treatment.[179] Unfortunately, many think of striving for equity in unfair terms, portraying affirmative action as "reverse discrimination" and as ignoring the merits of the most qualified and even stigmatizing those who benefit from such plans.[180] Valuing equity and valuing merit are not mutually exclusive, as some have come to believe. In fact, research has demonstrated that establishing a *multicultural meritocracy* in which *both* are emphasized has the potential to reduce stereotyping and discrimination and increase engagement for all people in organizations.[181]

An Ethical Choice

Affirmative Action for Unemployed Veterans

Unemployed veterans, take heart: Walmart wants *you*. In a historic move, the retailing giant vowed to hire any returning U.S. veteran who applied. As a result, the company hired 320,000 veterans in 2020, exceeding their initial goal of 250,000 hires set in 2013 by 70,000. Other businesses have launched similar initiatives, such as the 100,000 Jobs Mission, which aimed to hire 100,000 veterans by 2020. The coalition, which originally included eleven companies, now consists of 230 companies from nearly every industry. As of 2020, 712,823 veterans had been hired. The immense growth has prompted the coalition to commit to raise its goal to hiring 1,000,000 U.S. military veterans and to change its name to the Veteran Jobs Mission. Is this an ethical choice all businesses should be emulating?

Few people would disagree that there is a need to address the plight of returning soldiers to America. Many veterans say employers do not want them. "There are a lot of companies that say they want veterans, but that conflicts with the unemployment numbers," claims Hakan Jackson, a former technician in the Air Force. He is right: Unemployment rates remain higher for veterans than civilians.

According to some veterans, the returning soldiers are not competitive enough in the marketplace. Erik Sewell, an Iraq War veteran, suggested that the reason the veteran unemployment rate is poor is partly that vets often do not market their strengths well or showcase their transferable skills to potential employers. Bryson DeTrent, a twelve-year veteran of the National Guard, found that companies are reluctant to hire veterans, especially National Guard members, fearing these employees may later be called to duty. Mental and emotional well-being is also a concern because employers may worry that veterans suffer from post-traumatic stress disorder (PTSD). Despite concerns, some managers report that veterans' work ethic, team outlook, and receptivity to training are greater than among the general populace.

Sometimes, affirmative action is needed to give an unfairly disadvantaged workforce segment an opportunity to succeed, whether it is done through percentage quotas, number quotas, or hiring all prospective employees from the desired groups. But any program risks including underqualified individuals from the target group while excluding qualified individuals from other workforce segments. This might mean hiring an underqualified veteran instead of a well-qualified civilian.

Resources are always scarce, and there are only so many jobs to go around. Managers must balance the ethics of affirmative action against the responsibility of strengthening their workforces for the good of their organizations.[182]

Third, a focus on **inclusion** involves creating an environment in which all people feel valued, welcomed, and included.[183] A commitment to inclusion involves ensuring that all workers feel that they have the opportunity to contribute, to be involved in the decisions that affect them, and to be valued as a part of the team. A focus on inclusion involves recognizing that each worker, employee, and manager in an organization has their own unique "voice." Inclusion creates an environment where these diverse voices can be expressed and resonate.[184] Consider, for instance, managers in a subsidiary, non-headquarters (HQ) country. It is often a challenge to ensure that such employees feel included as they are remote and disconnected from the HQ country. However, research demonstrates that inclusion can be enhanced by actively seeking their advice and tapping into their well-connected, local networks in the subsidiary country.[185] These ethnically diverse managers feel valued and that they belong. As the vice president of Inclusion Strategy at Netflix, Vernā Myers, has said, "Diversity is being invited to the party. Inclusion is being asked to dance."[186]

inclusion Creating an environment in which all people feel valued, welcomed, and included.

Although these strategies and goals are a step in the right direction, as we mentioned at the beginning of the chapter, OB does not have all of the answers. DEI is a modern challenge that society and the world of work are actively seeking to address. Nevertheless, theory and research have established a broad and compelling foundation that workers, managers, and organizations can build upon to help move diversity management forward. In the next section, we discuss a theoretical basis underpinning diversity management that can help

managers and organizations understand the phenomena underlying programs, training, and policies that are more likely to be successful.

Theoretical Basis Underlying Diversity Management

Too often, managers approach diversity management without an understanding of evidence-based practices toward mitigating prejudice and inter-group conflict. Instead, they may latch onto diversity as a buzzword, promote representation while ignoring prejudice, and neglect to address the psychological processes underlying diversity issues in organizations. In this section, we discuss the common ingroup identity model and the contact hypothesis, two evidence-based paradigms for reducing prejudice and conflict in diverse groups and organizations.

common ingroup identity The idea that bias can be reduced and inclusion can be fostered by transforming workers' focus on what divides them ("us" and "them") to what unites them ("we").

The Common Ingroup Identity Model The idea behind **common ingroup identity** is simple: It involves transforming workers' focus on what divides them to what unites them, changing perceptions of "us" and "them" to a more inclusive "we."[187] In essence, the theory uses the same social categorization mechanisms that divide people to, once again, unite them. For instance, research has shown that forging a common ingroup identity between citizens and immigrants reduced racism toward immigrants, increased positive attitudes toward immigrant inclusion, and even predicted committing volunteer hours toward supporting immigrants or donating to immigrant support efforts.[188] On the other hand, emphasizing the differences between people and glorifying conflict between groups tends to perpetuate and even fuel a desire for more conflict.[189]

Overall, the evidence on the common ingroup identity model has been promising. It has even been demonstrated to have an effect on *implicit bias,* with experiments showing a reduction in bias scores on the IAT.[190] However, although common ingroup identity is a powerful tool, employees and managers need to be careful not to use it in a way that inadvertently overshadows people's diverse identities. Furthermore, the approach may also undermine some equity efforts, as workers begin to overlook inequality and become less likely to address it.[191] (The same criticism is also true for the contact hypothesis, described next.)

contact hypothesis The idea that the more people from diverse backgrounds interact with one another, the more prejudice and discrimination between the groups will decrease over time.

The Contact Hypothesis The **contact hypothesis** proposes that the more people from diverse backgrounds interact with one another, the more prejudice and discrimination between the groups will decrease over time.[192] In other words, contact reduces prejudice between individuals over time as they interact with one another.[193] Contact may be one of the most promising ways in which majority group members begin to think differently about diversity and become aware of and psychologically invested in the interests of minority groups.[194] The contact does not need to be physical, either. Research shows that virtual or even imagined contact can have an impact on prejudice reduction, inclusion, and anxiety reduction and can even lead to future, direct contact.[195] Indirect contact can also have an impact. For example, even if you do not interact with members of another group, if your fellow group members do, it can have a contagious effect in reducing your prejudice.[196]

Thinking back to the sections on diversity dynamics and cross-cultural OB, you may recall that time leads initially diverse groups to reconcile their differences. However, you may also recall that the initial outcomes are not the most desirable, and groups can often get off to a rocky start. The same is true with the contact hypothesis—negative experiences between members of different groups can actually lead to angry confrontations that initially reinforce prejudice, especially among those high in SDO.[197] Similarly, intergroup contact may be a less effective strategy in countries that emphasize power distance

and status hierarchies between people and groups.[198] Further, stress and a lack of mental resources may dampen the positive effects of contact, suggesting that contact-based interventions may be most effective in less stressful environments.[199]

Regardless, intergroup contact is a promising approach for reducing prejudice and promoting diversity in the workplace. For instance, imagined contact has been shown to improve hiring managers' perspective taking—leading them to rate transgender applicants as more likeable and hirable than hiring managers who did not engage in imagined contact.[200] Furthermore, in one study examining the performance of NBA basketball players and their coaches between 1955 and 2000, players of the same race as their coaches initially received more playing time from their coach—but the longer they were on their teams together, the more playing time coaches gave to players of different races.[201]

Diversity Management Practices

Organizations use a variety of diversity management practices to meet their goals of enhancing DEI in the workplace. As we just reviewed, there are a number of evidence-based approaches that can help inform diversity management effectively. Further, there is a business case for diversity management: Hundreds of studies have established a link between age, racial, cultural, and gender diversity in organizations and company performance (e.g., competitive advantage, financial performance).[202] When incorporated as a core component of business strategy, diversity-oriented programs can increase representation of minority groups, buffer negative effects of perceived discrimination, and positively affect an organization's return on investment (ROI).[203]

But what do managers actually do? Unfortunately, many have yet to aspire toward these goals (if they consider diversity management at all) and instead focus on practices that are identity-blind or that single out minority groups for differential (instead of inclusive) treatment.[204] Further, managers can become overly focused on preventing exclusion (e.g., complying with legal regulations, avoiding disparate impact) at the expense of promoting inclusion (e.g., establishing a psychologically safe, inclusive environment).[205] Despite missteps in priorities, the truth is that diversity management involves both beneficial processes (e.g., enhancing DEI) and detrimental processes (e.g., increased short-term turnover and conflict).[206]

Well then, what *should* managers do? We suggest that the most effective diversity management strategy would be one that considers the unique needs of its workers, employees, managers, customers, and industry. Too often, managers approach diversity management in a one-size-fits-all fashion, failing to assess their organizations' needs critically and authentically and relying too heavily on diversity "awareness" and not "action."[207] Multinational organizations should also tailor their approach to the countries and cultures in which they operate. For instance, a case study of the multinational Finnish company TRANSCO found it was possible to develop a consistent global philosophy for diversity management. However, differences in legal and cultural factors across nations forced the company to develop unique policies to match the cultural and legal frameworks of each country in which it operated.[208] In the following sections, we discuss a number of diversity management practices that have been utilized.

Leading for Diversity Managers need to take an active role as leaders in pursuing DEI in their organizations. Apart from the roles that leaders play, leaders should seek to develop personal knowledge, skills, and competencies related to diversity management. For instance, managers should seek out multicultural experiences, develop their CQ and EQ (see the chapter on emotions and

moods), and strive to become more flexible and open to new experiences.[209] These competencies can assist managers in more effectively leading for diversity.

Primarily, leaders should assume four primary roles in diversity leadership: (1) advocate for diversity as a resource, (2) promote positive intergroup interactions, (3) stimulate discussions and conversations among those of different backgrounds to manage the organizations' knowledge, and (4) encourage continuous reflection on the organizations' diversity practices, processes, and goals.[210]

To promote inclusion, leaders need to first focus on themselves with a sense of humility, authenticity, and understanding of their own diverse characteristics. Armed with insight and an understanding of where they fit into the puzzle of the organization, leaders can (1) facilitate belongingness by supporting all workers as members of the team and including them in decision making and (2) convey that their uniqueness is valued by encouraging diverse contributions and helping all members fully contribute.[211]

Finally, managers can do much to promote equity in their organizations. Obviously, managers play a key role in establishing DEI strategy in their organizations. To realize this strategy, however, they need to clearly demonstrate expectations and communicate policies to employees so they can understand how and why certain practices are followed.[212] For instance, they should confront prejudice and discrimination as it happens and encourage its reporting to HR with zero tolerance as well as look for and remove any hidden barriers to advancement and promotion in the company. Although these actions might involve risk on the part of the leader in particularly toxic cultures, they are particularly meaningful for marginalized workers. For instance, one study of transgender employees found that observing these acts of "oppositional courage" conveyed a powerful message to organization members, in turn, improving their self-esteem, job attitudes, and well-being while reducing their emotional exhaustion.[213] They can also be active in setting structure: designing tasks, roles, hierarchies, and learning systems that promote equity and diversity of contribution.[214] For instance, managers can promote equity through HR practices (e.g., recruitment, staffing, training, and development), as we describe in the sections that follow.

Diversity Recruitment and Staffing One method of enhancing workforce diversity is to target recruitment messages to specific demographic groups that are underrepresented in the workforce. This means placing advertisements in publications geared toward those groups; pairing with colleges, universities, and other institutions with significant numbers of underrepresented minorities, as Microsoft is doing to encourage women to undertake technology studies;[215] and forming partnerships with associations like the Society of Women Engineers or the National Minority Supplier Development Council. Research has shown that women and minorities have greater interest in employers that make special efforts to highlight a commitment to DEI in their recruiting materials.[216] Furthermore, recruitment materials that promote perspective taking (e.g., imagining oneself as the victim of discrimination) have been shown to increase applicant attraction toward the recruiting organization, especially for majority group members.[217] Diversity advertisements that fail to show women and minorities in positions of organizational leadership send a negative message about the organization.[218] Some companies have been actively working toward recruiting less-represented groups. Etsy, an online retailer, hosts engineering classes, provides grants for aspiring women coders, and then hires the best.[219] McKinsey & Co., Bain & Co., Boston Consulting Group, and Goldman Sachs have also actively recruited women who left the workforce to start families by offering phase-in programs and other benefits.[220]

The hiring process is one of the most important places to apply diversity management efforts. Hiring managers need to value fairness and objectivity in selecting employees and focus on the productive potential of new recruits. When managers use a well-defined protocol for assessing applicant talent and the organization clearly prioritizes nondiscrimination policies, qualifications become far more important factors than demographic characteristics in determining who gets hired.[221] As mentioned previously, HR managers should be well aware of the assessments and tools they are using to select applicants for the roles, taking care to reduce disparate impact. Assessments that are cognitively loaded or that involve person-to-person interaction (e.g., interviews) tend to lead to the most disparate impact. Consistent with social categorization, people are motivated to form groups based on their similarities—such is the case with recruitment and selection, with applicants with similar biographical characteristics (to their interviewer) more likely to receive and accept job offers from them.[222] This does not mean you should throw out interviews or tests altogether—it just means that care should be taken to reduce potential discrimination during the hiring process as much as possible.

Diversity Training and Development Most diversity training programs have three distinct components. First, they teach people about the legal framework for equal employment opportunity and encourage fair treatment of all people regardless of their demographic characteristics. Second, they teach people how a diverse workforce is better able to serve a diverse market of customers and clients. Third, they foster personal development practices that bring out the skills and abilities of all workers, acknowledging how differences in perspective can be a valuable way to improve performance for everyone.[223] In general, diversity training works: Reviews of hundreds of studies suggest that it is effective at improving diversity knowledge and representation as well as reducing discrimination in organizations.[224]

However, as we mentioned earlier, most managers and organizations are not thoroughly aware of their own DEI needs to begin with. Further, certain aspects of diversity training programs may be more effective than others, making a "needs analysis" all the more critical. In other words, a diversity training program may be successful at raising awareness for discriminatory practices but do very little in helping employees recognize their own biases. As such, managers should seriously consider the DEI needs in their organization and tailor the training and development approach to address those needs. Second, training is only as good as the opportunities trainees have to apply what they learn. For instance, one study found that workers only applied the interracial perspective–taking skills they learned during training if they had close cross-race friendships.[225] This finding highlights the need for diversity training to foster trainee motivation or to encourage goal setting.[226] Goal setting can improve trainees' motivation to apply what they learned from the training. For example, goal setting led trainees to apply what they learned in one training program meant to develop supportive behaviors toward those of diverse sexual orientations.[227]

Mentorship programs may also be established to advance an organization's DEI goals. Despite their general effectiveness, mentorship programs run into the same issues that staffing runs into with cross-race and cross-gender mentorship (e.g., protégés and mentors generally prefer to associate with those who share the same biographical characteristics). In other words, managers are more likely to be White males who tend to select other White males to mentor.[228] Regardless, mentorship may serve as a diversity development opportunity to pair workers with knowledgeable and experienced employees who may help that person's personal growth and career advancement.

Cultures and Climates for Diversity

Too often, managers implement diversity management practices that fall short. They take action to overhaul their organization, but the organization will not budge. As a group of OB researchers once asserted, "Establishing a diversity program is not enough."[229] While better representation, equity, and inclusiveness in organizations remains a goal, the shared perceptions of DEI in the organization are critical for diversity management practices to have a positive effect. Although we will discuss cultures and climates in more detail in a later chapter, management will not be as effective unless managers consider the organization's culture and climate for diversity. A **diversity culture** values and prioritizes diversity and inclusion and believes that it should be fostered within the organization. For instance, Ulta Beauty exhibits "championing diversity" as a key component of its mission and values and is openly committed to "magnifying, uplifting, supporting, and empowering" Black voices in beauty.[230] A **diversity climate** flows from a diversity culture and reflects the shared perceptions of diversity- and inclusion-enhancing policies, practices, and procedures in the organization.[231] In other words, workers in a diversity climate are aware that there are norms, policies, and procedures that are enforced that support diversity, enhance inclusion, and grant equal access and participation to employees.[232]

diversity culture The shared diversity values, prioritization of diversity, and belief that it should be fostered by members of an organization.

diversity climate The shared perceptions of diversity-enhancing policies, practices, and procedures among members of an organization.

As with DEI initiatives in general, diversity cultures and climates simultaneously emphasize prejudice and discrimination reduction, enhancing representation, and advocating for inclusion.[233] A positive diversity climate can lead to increased financial performance and customer satisfaction, commitment, and retention and can even reduce the negative effect of fault lines, suggesting there are organizational performance gains associated with reducing racial and ethnic discrimination.[234] A positive diversity climate in a host institution can also lead both refugees and expatriates to feel more welcome and adapt to life in a new country more quickly.[235] Diversity culture and climate in many ways put the common ingroup identity model into practice, with all employees identifying with the organization as a cohesive group.[236]

The Challenge of Diversity Management

Although the field of OB has a head start (thanks to colleagues in social psychology and sociology), diversity management is not cut-and-dried. Managers can craft evidence-based practices, a DEI-friendly culture and climate in their organization, and take strategic action toward DEI goals and still fall flat. Although new challenges to diversity management are still being uncovered, a number of these challenges have been well-documented. Managers would do well to consider and address these challenges in their own diversity management initiatives.

First, *authenticity* plays a huge role. Leaders and managers of organizations are confronted with the challenge of demonstrating a commitment to DEI—but if they appear to be doing so for self-interested reasons[237] or otherwise appear to be "all talk" (i.e., saying that they value diversity but doing nothing about it),[238] they can lose all credibility. Furthermore, attempts to connect with all employees and appear more authentic (e.g., through humor) can also backfire, leading to diminished inclusion perceptions.[239]

Second, many leaders and managers half-heartedly committed to DEI will engage in **tokenism**,[240] or a perfunctory effort to enhance representation to make it seem like their company values diversity. For instance, an organization may hire only a small number of underrepresented people to meet diversity expectations and stop at that point. Feeling tokenized can have detrimental

tokenism When management makes only a perfunctory effort to enhance representation to make it seem like the company values diversity.

effects for the worker or manager in that position and can be perceived by the public as inauthentic. Tokenism is, unfortunately, fairly common. For instance, an analysis of the S&P 1500 corporate boards found that more boards than expected by chance included "exactly two women," a phenomenon the authors of this study referred to as *twokenism*. In other words, S&P 1500 executives were more likely to conform to their peers by hiring two token women as executives and less likely to add more women to the board once they reached that number.[241]

Third, diversity management can lead to several paradoxical effects. For instance, although appointing a member of an underrepresented group to a leadership position may in many ways legitimize diversity, leading to positive changes within the organization, it can also result in negative effects if that leader is tokenized, is put in that position to fail (like the glass cliff phenomena discussed earlier in the chapter), or has their diversity "put on trial" (a form of stereotype threat where they are pressured to excel).[242]

Fourth, organizations do not exist in a vacuum. The surrounding context, major events, and even the overarching diversity culture and climates at the regional level can have an influence on the success of diversity management. For example, even though an organization might have policies in place that support gender identity inclusion, cultural masculinity and femininity norms, gender role expectations, patriarchal institutions, and governmental policies (e.g., lack of protection for gender identity, wage norms) can undermine the effects of those diversity management practices.[243]

Despite the factors that may be working against diversity management success, employees, managers, and organizations have a responsibility to prioritize DEI. Not only does DEI help promote justice and fairness in the workplace, but it also can lead to enhanced job attitudes, well-being, and even performance. Although OB has a long way to go, workers and managers would do well to become educated and skilled in diversity management and work toward making their organizations inclusive and welcoming for people of all backgrounds.

Summary

Diversity management is a major societal challenge. Theorists, researchers, and practitioners in various fields are doing their part to understand how people can make organizations more diverse, equitable, and inclusive environments to work. In this chapter, we explained what is meant by "diversity" along with the levels at which diversity manifests. Although people can be characterized in many ways, we focused on three primary biographical characteristics relevant to the workplace. These characteristics include race/ethnicity, age, and gender identity/sexual orientation. Next, we described prejudice and discrimination in organizations, two primary nefarious outcomes that result from intolerance for diversity. We moved on to describe theory from social psychology, sociology, and I/O psychology, which has influenced how we think about diversity in organizations. With this theoretical basis as a foundation, we described how certain diversity elements (e.g., group composition and fault lines) affect group and team dynamics. Then, moving up levels toward the organization and country, we described how culture and cross-cultural aspects of organizational life influence diversity, such as expatriates' adjustment to new countries. In this section, we discussed religion as well as cultural intelligence, values, and norms. Finally, we discussed how organizations approach managing diversity through a three-pronged focus on DEI.

Although we know a great deal about diversity in organizations through decades of research and practice, there is still much work to be done. However, we hope that you have a clearer understanding of diversity in organizations by having read this chapter. You can use this knowledge of state-of-the-art diversity management to help organizations become more diverse, equitable, and inclusive.

Implications for Managers

- Strive to be aware of and sensitive to the complex implications of diversity in your organization.
- Assess and challenge your own beliefs, prejudices, and stereotypes to increase your awareness of bias.
- Take efforts to root out illegal, discriminatory practices, both overt and subtle, in your organization.
- Look beyond readily observable biographical characteristics and consider individuals' capabilities before making management decisions.
- Educate your colleagues, subordinates, and others about both the ethical and business case for diversity to increase buy-in for diversity management.
- Identify the potential impact of diversity dynamics in your groups and teams and be mindful of them when administering assessments, building teams, and resolving conflict.
- The more you understand and consider differences between cultural values, norms, and identities, the better you will be able to adapt to and manage cross-cultural dynamics in your organization.
- Implement evidence-based best practices when developing your organization's diversity management initiatives, focusing on diversity, equity, and inclusion.
- Strive to develop a diverse culture and climate where employees feel that diversity, equity, and inclusion are valued and put into practice and feel safe to contribute as their authentic selves.
- Be mindful of the fact that diversity management may not be successful right away. There are many barriers to its effectiveness, some avoidable (e.g., authenticity and tokenism) and some unavoidable (e.g., systemic bias, your organization's cultural context).

CHAPTER REVIEW

QUESTIONS FOR REVIEW

2-1 What are the two major forms of workplace diversity?

2-2 How do workplace prejudice and discrimination undermine organizational effectiveness?

2-3 What are the key theoretical perspectives on prejudice, discrimination, and diversity relevant to OB?

2-4 How do composition and fault lines affect group/team functioning?

2-5 How do Hofstede's five value dimensions and the GLOBE framework differ?

2-6 What are the three strategic and principled goals of diversity management?

Using Artificial Intelligence for Hiring Leads to Greater Diversity

POINT

Many C-suite leaders, including the CEO of Wells Fargo, have attributed a lack of diversity in their workforce to a limited pool of underrepresented applicants. As more and more companies increase efforts to diversify their workforce, artificial intelligence (AI) is revolutionizing how companies recruit and select employees. On a basic level, AI offers the opportunity to access a wider pool of applicants. For example, many companies have traditionally used on-campus recruiting. Organizations can send only a limited number of people to job fairs, and some quality candidates may not even attend them. Furthermore, recruiting may be narrowly targeted toward elite university students. However, only 6 percent of first-year students at elite universities are Black.

Although many organizations have implemented implicit bias training with some success, AI does not have the same unconscious biases as human interviewers. Human interviewers may not be able to pinpoint precisely how unconscious bias has impacted their decisions because humans often rely on intuition or a "gut feeling." Utilizing AI ensures that HR managers apply the same hiring criteria to every candidate. For example, companies like OutMatch use video interviewing technology to conduct the same interview with the same questions for every candidate. Even if biases stem from the AI programming, it is significantly easier to spot where they occur in the algorithm and address them than for human biases.

Some organizations may worry that using AI in the hiring process will make their company seem detached. Greg Moran, CEO of OutMatch, contends that the opposite is true. Automating repetitive tasks enables hiring managers to focus on the more essential ones, such as developing a personal connection with job candidates. While increasing workforce diversity is just one aspect of an organization's diversity management strategy, AI depicts a promising future of a less biased hiring process.

COUNTERPOINT

Many companies are likely ignoring or overlooking that AI can be just as biased as humans. AI tools are like all other algorithms in that humans train them. Even though an organization likely has good intentions when using AI, bias can still be present. For example, a model could be built that determines the common characteristics in a company's current workforce. An AI tool could learn to filter out individuals with specific biographical characteristics instead of those relevant for success on the job if the current workforce is not diverse.

There is also some concern over the lack of transparency in some AI vendors regarding how their platforms work. For instance, these tools' popularity has led to greater scrutiny, particularly from the government. In January 2020, Illinois introduced a law regulating AI in video job interviews. The law requires employers to inform job candidates that they will use AI to analyze the interview, explain how the AI works, and obtain consent from the candidate. Many would argue that informing candidates of the use of AI and obtaining their consent for its use is an often-omitted ethical consideration for using AI.

Lastly, many suggest that AI must be monitored and supervised, like an employee who is making hiring decisions. Just as human choices can be audited and examined for bias (e.g., disparate impact or treatment), it may also be possible to look for bias in algorithms. Some might argue that this is relatively easy in AI and suggest that employers regularly audit AI to prevent discrimination as a solution. However, this process will still likely prove to be difficult for organizations. As many AI and machine learning professionals contend, there is "no free lunch" when it comes to AI. No one algorithm can solve all organizations' problems; an algorithm optimized to solve a specific problem (e.g., hiring candidates) may pay for this performance with problems in other domains (e.g., hiring underrepresented candidates). The challenge of simultaneously prioritizing multiple goals is the same regardless of the tools one uses.

Further, it would be a mistake to say that AI could ever fully replace people, including human resource professionals and hiring managers. Even though AI can be incredibly sophisticated and make sense of very complex data, it can often lose the forest for the trees. AI can arrive at nonsensical conclusions that humans would be more likely to pick up on. For instance, researchers demonstrated that four well-placed stickers on a "STOP" sign could "fool" the self-driving car's AI algorithm. The AI read the sign as a "45" speed limit sign and sped into a busy intersection. Humans would have been arguably more likely to see and interpret these stickers for what they were. The value of people in supervising AI cannot be overstated. HR professionals and hiring managers' roles in implementing diversity management, building relationships with potential job candidates, and supervising AI are essential.[244]

APPLICATION AND EMPLOYABILITY

Diversity, in a variety of forms, is vital to the application of OB in the workplace. First, workplace discrimination can undermine an organization's effectiveness and can lead to many poor outcomes. Knowledge of diversity in OB can help you and your organization manage diversity effectively. Understanding diversity can also help you work effectively with coworkers who may be different from you in various ways. Second, cultures worldwide vary on the values that are important to them. Being aware of these different cultural values and spending time abroad can improve your cultural intelligence and help you interact more effectively with those of different cultural backgrounds. In this chapter, you improved your critical thinking skills and learned various ways to approach issues of social responsibility through encountering how elements of one's appearance can affect perceptions in the workplace, examining how some organizations focus on restorative equity by hiring applicants with prior justice system involvement or who were previously incarcerated, and considering artificial intelligence applications toward hiring a more diverse workforce. In the following section, you will have more opportunities to develop these skills by recognizing the differences and similarities between you and your classmates, considering how you can begin a conversation about DEI with your (potential) employer, and critiquing whether diversity training is truly effective.

EXPERIENTIAL EXERCISE Differences

The instructor randomly assigns the class into groups of four. It is important that group membership is truly randomly decided, not done by seating, friendships, or preferences. Without discussion, each group member first answers the following question on paper:

2-7. How diverse is your group, on a scale of 1 to 10, where 1 = very dissimilar and 10 = very similar?

Each person puts their paper away and shares with the group answers to the following questions:

- *What games/toys did you like to play with when you were young?*
- *What do you consider to be your most sacred value (and why)?*
- *Are you spiritual at all?*
- *Tell us a little about your family.*
- *Where's your favorite place on earth and why?*

Each group member then answers the following question on paper:

2-8. How diverse is your group, on a scale of 1 to 10, where 1 = very dissimilar and 10 = very similar?

After groups calculate the average ratings from before and after the discussion, they will share with the class the difference between their averages and answer the following questions:

2-9. Did your personal rating increase after the discussion? Did your group's average ratings increase after the discussion?

2-10. Do you think that, if you had more time for discussion, your group's average rating would increase?

2-11. What do you see as the role of surface-level diversity and deep-level diversity in a group's acceptance of individual differences?

ETHICAL DILEMMA Should You Question an Employer About Its DEI Policy?

Imagine that you are at a job interview. The job is for a position that would include a substantial pay raise from what you are making now and significantly help you advance your career. You do not want to do anything to jeopardize your chances of landing the position. While the interviewer mentions that the company values diversity, you have heard through your extended network that this is not always the case.

Furthermore, this issue is important to you because you feel excluded from your current company. For instance, your employer seems to mention their DEI goals every chance they get, yet you still feel excluded. The company highly encourages participating in their social events, but every time you have attended one, it has been challenging to connect with your coworkers. You also cannot help but wonder why management did not select you for a promotion in your current job. You were just as qualified as your promoted coworker and worry that you were passed over because of your background (either unintentionally or intentionally). It does not help your company's case that there are very few members of underrepresented groups in senior leadership positions.

You are in the early stages of looking for a new job, but you believe it would be difficult to find a position better than the one you are in now. The question is: Do you ask the company specific questions about how it creates a diverse, equitable, and inclusive work environment? Or do you take the company's word for it?

Questions

2-12. If you were in a similar situation, would you question a potential or current employer's DEI policy? Why or why not?

2-13. What are the ethical considerations surrounding the situation? What are the rights, duties, and obligations of the employer and employee in this situation?

2-14. If you decided to ask about the DEI policy, what types of questions would you ask, or how would you go about broaching the topic? If you decided not to ask about the DEI policy, what actions, if any, would you take?

2-15. Beyond increasing its workforce diversity, what other types of practices should an organization implement to foster an equitable and inclusive work environment?[245]

CASE INCIDENT Encouraging Female Engineers

When Jess Stone tells people she is training to become an engineer, they often remark that she does not look like the kind of person who would "fix a boiler." According to the 23-year-old, who works for aerospace company Airbus, "There's a bit of a misunderstanding around the term 'engineer.' Oily overalls? These ideas are so outdated."

While 47 percent of the UK workforce is female, the figure for those working in core engineering occupations is just 12 percent. In engineering businesses, it is only 9 percent, according to Engineering UK. "Times have changed. There has been progress, but it's still a male bastion," says Margaret Craddock, who has spent 33 years in the sector. She recalls one eager salesman visiting her site office 30 years ago, when she was the co-owner of a machinery business, and asking her, "Is there anybody important here?" More recently, she has also heard men ask women in the sector, "Are you a real engineer?"

In her current role as BatchLine Division lead with Dyer Engineering, a fabrication and machining business in County Durham, Craddock does come across women, but mostly in engineering purchasing departments. "But when you get to welding and machining, it's a harsh environment. It's noisy; it's dangerous," she says.

With a retiring workforce and technology creating new opportunities, engineering in Britain is suffering from severe skills shortages, and new blood is urgently needed. According to EngineeringUK's 2018 report, the sector has an annual demand for 124,000 engineers and technicians with core engineering skills but faces a shortfall of up to 59,000 every year.

Engineering offers exciting prospects and fascinating work. "I really enjoy the technical challenges," says Emilie Weaving, a mechanical development engineer working for construction equipment manufacturer JCB. Salaries are also good. According to Engineering UK, graduates with an engineering and technology degree had an average starting salary of around €30,000, above the all-subject average of €24,500. Despite eager recruits like Ms. Weaving and Ms. Stone, the lack of diversity in UK engineering is a concern for the sector.

When it comes to international comparisons, the United Kingdom scores poorly. According to Hayaatun Sillem, Chief Executive of the Royal Academy of Engineering, it "has the lowest proportion of female professional engineers of any European country." But that is not to say that this is only a British issue; proportions are low across the continent.

Recruitment isn't the only issue; there's also a retention problem. A 2017 report from the Institution of Mechanical Engineers said that within a few years of gaining an engineering degree, just under half of the United Kingdom's female engineering graduates were leaving the profession, while two-thirds of male engineers remained. Clearly, this is a huge waste of women's potential. [246]

Questions

2-16. What factors may have caused the low participation rate of females in engineering?

2-17. What could be done to attract more women and other underrepresented groups to the profession?

2-18. Retention of women engineers is also an issue. How could this be improved?

3

Job Attitudes



Source: Ekaterina Minaeva/Alamy Stock Photo

LEARNING OBJECTIVES

After studying this chapter, you should be able to:

3-1 Contrast the three components of an attitude.

3-2 Summarize the relationship between attitudes and behavior.

3-3 Compare the major job attitudes.

3-4 Identify the two approaches for measuring job satisfaction.

3-5 Summarize the main causes of job satisfaction.

3-6 Identify four outcomes of job satisfaction.

3-7 Identify four employee responses to job dissatisfaction.

This matrix identifies which features and end-of-chapter material will help you develop specific skills employers are looking for in job candidates.

Employability Skills Matrix (ESM)

	Myth or Scence?	An Ethical Choice	Point/ Counterpoint	Toward a Better World	Experiential Exercise	Ethical Dilemma	Case Incident
Critical Thinking & Creativity	✓	✓	✓	✓	✓	✓	✓
Communication	✓	✓			✓	✓	✓
Collaboration	✓	✓		✓	✓		✓
Self-Management		✓	✓		✓	✓	✓
Social Responsibility	✓			✓	✓	✓	✓
Leadership	✓		✓	✓	✓		✓
Career Management		✓	✓		✓	✓	

IN THE LEGOLAND WONDERLAND

Imagine working in a workplace divided into flexible work zones with no specific seating arrangements and no offices for managers, where you can choose to work in different settings that can support the activities or tasks you are performing, within an environment that can provide the ambience that helps you perform at your best. Imagine a workplace that has a variety of spaces that support different types of individual work as well as teamwork, a workplace that includes a library, quiet-zone booths (which are do-not-disturb places), areas that are equipped with high partitions for "head down" work, as well as small, closed rooms for complete privacy and circular "study caves" carved out of a wall for individual contemplation or rest. A workplace where technology enhances job satisfaction and innovation plays a key role, and where creativity is constantly stimulated in various ways. A workplace that, apart from the workspace, includes a wellness center (containing gyms, massage rooms, a swimming pool, a multiuse indoor sports pitch, etc.), a rooftop garden split over multiple storeys, and cafés where you can grab healthy and reenergizing food and beverages. This has been the vision, and ultimately the reality, for Lego's work environment setup.

Some will wonder, why go to such lengths to create such an office environment? Lego shares a philosophy with Google, Microsoft, and Facebook that their staff must be encouraged to be creative and to *become*, and they seek to achieve this by providing exemplary working environments. They have embedded in their organizational culture the belief that employees' momentum and well-being is key to improving job satisfaction. Sophie Patrikios, Senior Director of Consumer Services at Lego, has stated that the leadership at the company is always supportive and driven by a clear vision; it is not fixated on numbers but on the core values of the company deriving from its vision. Conversely, behaviors that are not in line with the values and the vision of the company have no place in it. The company seeks to instill its values and vision by encouraging management to allow space for creativity and initiative.

Many at Lego will aver that thinking and behaving like this is in the company's DNA, linked to their famous bricks, an outlet for creativity of many a child (and adult). Others would add that this company has an authentic reverence for its employees, seeking not just to appeal to their minds in motivating performance but also to their hearts.

More prosaically, others will see this as a way to reengineer traditional HR to ensure a happy workforce for an ultimately profitable workplace. But if all these play an important role in employees' overall job satisfaction—and of course they do indeed—how do these elements actually affect the way they formulate their attitudes about the company's human resource management philosophy and approach?[1]

It is a truism to say that a happy worker is a productive worker. However, there are a variety of contributors to job attitudes that may change over time. What factors besides organizational culture, leadership, and infrastructure affect job attitudes? Does having a satisfying job really matter? Before we tackle these important questions, it is important to define what we mean by attitudes generally and by job attitudes in particular.

Attitudes

3-1 Contrast the three components of an attitude.

Attitudes are judgments or evaluative statements—either favorable or unfavorable—about objects, people, or events. They reflect how we feel about something. When you say, "I like my job," you are expressing your attitude about your work.

Attitudes are complex. Let's say that you are interested in becoming an accountant. If you were to ask accountants and auditors their attitudes toward their job, you may get simple responses (e.g., "No, I hate my work," "Being an accountant is fantastic!" etc.), but the underlying reasons are likely more complicated. For example, accountants who perceive that their jobs have challenges, great benefits,

and supportive management are much more likely to be happier with their jobs.[2] In this chapter, as we will see, how satisfied you are with what you do, how committed you are to your employer, and other attitudes are significant considerations in the workplace. If you like your job, you are more willing to stay, do your work well, and even go above and beyond to make sure the work gets done. To fully understand attitudes, we must consider their fundamental properties or components.

attitudes Judgments or evaluative statements about objects, people, or events.

Typically, researchers assume that attitudes have three components: cognition, affect, and behavior.[3] The statement "My pay is low" is a **cognitive component** of an attitude—an opinion or belief about the attitude target (e.g., your supervisor). It sets the stage for the more critical part of an attitude—its **affective component**. Affect is the emotional or feeling segment of an attitude reflected in the statement "I am angry over how little I'm paid." Affect can lead to behavioral outcomes. The **behavioral component** of an attitude describes an intention to behave a certain way toward someone or something—as in "I'm going to look for another job that pays better."

cognitive component The opinion or belief segment of an attitude.

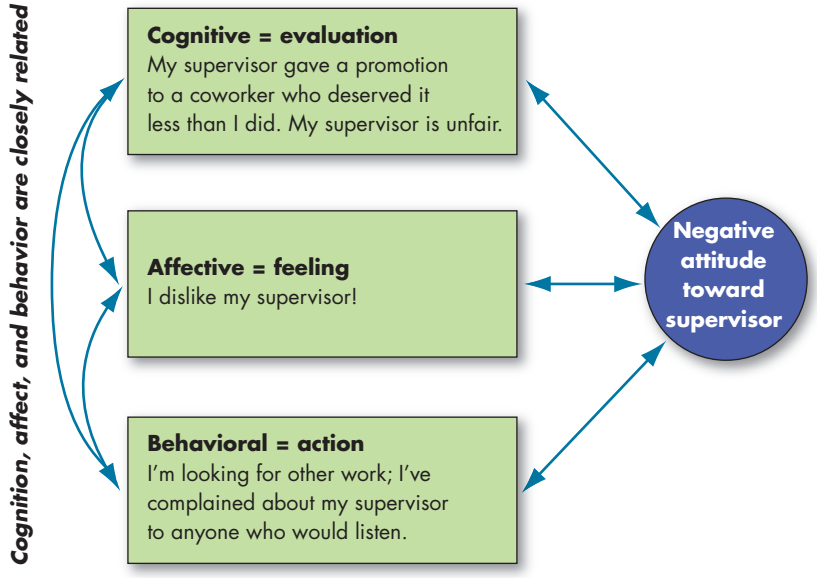
affective component The emotional or feeling segment of an attitude.

behavioral component An intention to behave in a certain way toward someone or something.

Viewing attitudes as having three components—affect, behavior, and cognition (e.g., the ABCs of attitudes)—helps us understand their complexity and the potential relationship between attitudes and behavior. For example, imagine you just now) realized that someone treated you unfairly. Aren't you likely to have almost instantaneous feelings occurring along with this realization? Thus, cognition and affect are intertwined.

Exhibit 3-1 illustrates how the three components of an attitude are related. Let's imagine that you did not get a promotion you thought you deserved. Your attitude toward your supervisor is illustrated as follows: You thought you deserved the promotion (cognition), you strongly dislike your supervisor (affect), and you have complained and taken action or otherwise intend to (behavior).

Exhibit 3-1 The Components of an Attitude



In organizations, attitudes are important for their behavioral component. If an accountant believes, for example, that they have no attachment to their firm and could get better opportunities with other firms, this belief could lead to whether they stay or leave their job. Understanding how this commitment is formed and how it might be changed is essential to managers who want to reduce turnover. Interestingly, some research from the Netherlands suggests that the cognitive component is most important for predicting who will become committed to the organization (e.g., newcomers in an onboarding program) or uncommitted (e.g., unattached accountants considering leaving for better positions).[4]

Attitudes and Behavior

3-2 Summarize the relationship between attitudes and behavior.

Perhaps it is easy to think of how attitudes can cause people to behave in certain ways. Using our previous examples, accountants who are not satisfied with their jobs or committed to their organizations may start looking for work elsewhere. Research, in general, supports the idea that attitudes predict future behavior.[5]

Several powerful characteristics change the nature of the attitudes-behavior relationship: the *importance* of the attitude, its *correspondence to behavior*, its *accessibility*, the presence of *social pressures*, and whether a person has *direct experience* with the attitude.[6] Important attitudes reflect our fundamental values, self-interest, or identification with individuals or groups we value. These attitudes tend to show a strong relationship with our behavior. However, discrepancies between attitudes and behaviors tend to occur when social pressures to behave in certain ways hold exceptional power, as in most organizations. You are more likely to remember attitudes you frequently express, and attitudes that our memories can easily access are more likely to predict our behavior. The attitude-behavior relationship is also much stronger if an attitude refers to something we have directly experienced. Advancements in machine learning (see Chapter 1) have enabled researchers to further understand the attitude-behavior relationship. For example, using a machine learning algorithm enabled researchers in one study of hospital nurses to determine that their job attitudes were related to performance in certain conditions, such as when their job responsibilities were clearly defined.[7]

However, there are some instances in which behavior might predict future attitudes. Did you ever notice how people change what they say so that it does not contradict what they do? For example, when people come forward to call out sexual harassment in their jobs, management and harassers alike will often minimize, ignore, or even aggressively justify their behavior.[8] Cases of attitude following behavior illustrate the effects of **cognitive dissonance**,[9] contradictions individuals might perceive between their attitudes and their behavior.

cognitive dissonance Any incompatibility between two or more attitudes or between behavior and attitudes.

People seek a stable consistency among their attitudes and between their attitudes and their behavior.[10] Any form of inconsistency is uncomfortable, and individuals attempt to reduce or minimize it. When there is dissonance, people alter their attitudes or behavior to minimize the dissonance or develop a rationalization for the discrepancy. For example, university faculty members on strike found it difficult to accept their union's recommendation to accept the university's offer and return to work.[11] Instead, they sought out additional information to justify their belief that the offer was unfair instead of accepting the offer outright.

No individual can avoid dissonance. You know texting while driving is unsafe. (There is research to prove it; do not try to justify your attitude or reduce your dissonance to get yourself out of this one!)[12] Still, you do it anyway and convince yourself that nothing bad will happen. The desire to reduce dissonance depends on three factors: the *importance* of the elements creating dissonance, the degree of *influence* we believe we have over those elements, and the *rewards* of dissonance.[13]



Westin Hotels strives for consistency between employee attitudes and behavior through a global wellness program to help employees improve their health. Shown here is Westin's executive chef, Frank Tujague, whose cooking demonstrations give employees direct experience with healthy ingredients and cooking techniques.
Source: Diane Bondareff/AP Images

Individuals are more motivated to reduce dissonance when the attitudes are important or when they believe the dissonance is due to something they can control. Rewards accompanying dissonance tend to reduce tension inherent in the dissonance. (In other words, the dissonance is less distressing if accompanied by something good, such as a higher pay raise than expected.) Individuals are more motivated to reduce dissonance when the attitudes are important or when they believe the dissonance is due to something they can control.

Job Attitudes

3-3 Compare the major job attitudes.

We have thousands of attitudes, but organizational behavior (OB) focuses on a narrow set that forms positive or negative evaluations that employees hold about their work.

For instance, **organizational identification**, or the extent to which employees define themselves by the same characteristics that define their organization, forms a basis for which attitudes and behaviors are engendered.[14] A review of hundreds of job attitude-behavior studies found that organizational identification strongly predicted job attitude formation.[15] Furthermore, drawing on artificial intelligence theory, some researchers have proposed that humans form attitudes similarly to how machines make predictions based on continuously incoming data. For example, employees may experience event (e.g., reduced pay) after event (e.g., downsizing) after event (e.g., canceled bonuses) while on the job. From these events, employees begin to "learn" that the organization may not value paying its employees well, begin to form negative attitudes toward the organization, and begin to disidentify.[16]

organizational identification The extent to which employees define themselves by the same characteristics that define their organization.

Organizational identification has become a hot topic in the Gig Economy. Contract and freelance workers engage in short-term agreements with multiple organizations and people who come and go over time. It might seem like these gig workers would probably develop little identification toward these organizations. However, recent research suggests that this might not be the case. If the work itself is personally fulfilling (e.g., provides a sense of autonomy and a chance to relate to other people), gig workers can identify with their contracting organizations.[17]

Beyond organizational identification, most of the research has looked at three attitudes: job satisfaction, job involvement, and organizational commitment.[18] Other critical attitudes include perceived organizational support (POS) and employee engagement. Before moving on to these primary attitudes, it is essential to note that OB is not solely focused on the link between positive job attitudes and desirable behaviors. As we will discuss later in the chapter, negative job attitudes and their outcomes are just as important. For instance, the effects of organizational identification are not all positive.[19] Organizational identification can lead employees to behave unethically on behalf of the organization (e.g., fudging numbers to make the organization look better), experience reduced performance, and perpetuate conflict between people. In fact, in one sample of thousands of White male corporate executives, organizational identification tends to decrease following a racial or gender minority CEO's appointment. The White male executives, in turn, provide less help to their colleagues as a result of this disidentification.

Job Satisfaction and Job Involvement

job satisfaction A positive feeling about one's job resulting from an evaluation of its characteristics.

When people speak of employee attitudes, they usually mean **job satisfaction**, a positive feeling about a job resulting from an evaluation of its characteristics. A person with high job satisfaction holds positive feelings about the work. In contrast, a person with low satisfaction holds negative feelings. Because job satisfaction is one of the most important attitudes, we will review this attitude in detail later.

An Ethical Choice

Office Talk

You are working peacefully in your cubicle when your coworker invades your space, sitting on your desk and nearly overturning your coffee. As they talk about the morning meeting, do you 1) stop what you are doing and listen or 2) explain that you are in the middle of a project and ask to talk some other time?

Your answer may reflect your attitude toward office talk, but it should be guided by whether your participation is ethical. Sometimes, office conversations can help employees process information and find solutions to problems. Other times, office talk can be damaging to everyone. Consider the scenario from two perspectives: oversharing and venting.

More than 60 percent of 514 professional employees surveyed indicated that they encounter individuals who frequently share too much about themselves. Some are self-centered and narcissistic and "think you want to know all the details of their lives," according to psychologist Alan Hilfer.

Despite the drawbacks, oversharers can be strong contributors. Billy Bauer, director of marketing for manufacturer Royce Leather, is an oversharer who boasts about his latest sales—which may push other employees to work harder. Employees can also contribute to teamwork when they share personal stories related to organizational goals.

Now let's look at this the other way. According to Yale professor Amy Wrzesniewski, some people are often "the first people to become offended" when it comes to office talk if they think the organization is making wrong decisions. They can become emotional, challenging, and outspoken about their views. If they are not heard, they can increase their venting or withdraw.

Yet these people can be top-performing employees: They are often highly engaged, inspiring, and strong team players who are more likely to work harder than others. Venting their frustrations helps restore a positive attitude to keep them high-performing. Research indicates that venting to coworkers can also build camaraderie.

Office conversations can quickly go awry if you do not pay attention to the situational norms, your role in the organization, the content of the discussion, and your own engagement in the conversation. Although there are some topics that are obviously reprehensible and off-limits, in general, there are no clear guidelines for what is and is not acceptable office talk. So you must monitor your own conversations and become aware of when they start to feel like venting or oversharing, and whether you feel you should participate in the conversation at that point. Knowing who is approaching you for conversation, why they are coming to you, what they may talk about, and how you may keep the discussion productive and ethical can help you choose whether to engage or excuse yourself.[20]

Related to job satisfaction is **job involvement**, the degree to which people psychologically identify with their jobs and consider their perceived performance levels important to their self-worth.[21] Employees with high job involvement strongly identify with and care about the kind of work they do; as such, they tend to be more satisfied with their jobs.[22] Another closely related concept is **psychological empowerment**, or employees' beliefs in the degree to which they influence their work environment, competencies, meaningfulness of their job, and autonomy.[23] The more "empowered" employees are, the more likely they are to perform well, engage in organizational citizenship behaviors (OCB) (see Chapter 1), and be creative. (They are also less likely to intend to leave the organization.)[24]

job involvement The degree to which a person identifies with a job, actively participates in it, and considers performance important to self-worth.

psychological empowerment: Employees' belief in the degree to which they affect their work environment, competence, meaningfulness of their job, and autonomy in their work.

Research suggests that psychological empowerment strongly predicts job attitudes and strain while it moderately predicts performance behaviors. A meta-analysis spanning forty-three studies and over 15,000 employees found that empowerment tended to be more predictive of these outcomes when considering all four beliefs (i.e., impact, competence, meaningfulness, and self-determination) together instead of each one separately. However, some evidence suggests that meaningfulness empowerment beliefs have a substantial effect on attitudes and strain, even after taking the other factors into account.

Organizational Commitment

An employee with strong **organizational commitment** identifies with their organization and its goals and wishes to remain a member. Emotional attachment to an organization and belief in its values are the gold standard for employee commitment.[25] OB scholars' understanding of organizational commitment has evolved since its introduction. Traditionally, theorists considered commitment to be comprised of three components: *affective*, *normative*, and *continuance* commitment. *Affective* commitment reflects emotional attachment to and involvement in an organization. *Normative* commitment reflects the sense of obligation an employee feels to an organization. Finally, *continuance* commitment reflects employees' consideration of the costs of leaving an organization and a drive to continue as an employee."[26]

organizational commitment The degree to which an employee identifies with a particular organization and its goals and wishes to maintain membership in the organization.

Committed employees will be less likely to engage in work withdrawal (even if they are dissatisfied) because they feel loyal or attached to the organization, they do not have other options, or it would be difficult to leave.[27] However, affective commitment tends to be most important for outcomes beyond turnover and retention, like attendance, performance, and organizational citizenship behavior.[28] Moreover, some criticize the three components and suggest that normative and continuance commitment are more like attitudes toward turnover (e.g., staying or leaving) than attitudes toward an organization.[29] Regardless, even if employees are not currently happy with their work, they may decide to continue with the organization if they are committed enough. For example, during times of crisis (e.g., the Great Recession), employees may experience a substantial amount of job insecurity, leading them to experience less affective commitment toward their organizations.[30] However, they would find leaving their organization difficult, considering the crisis's tumultuous job market, and experience greater continuance commitment as a result.

OB scholars have continued to refine our understanding of organizational commitment over the previous decades.[31] For instance, many have explored commitment as a psychological bond directed toward any given target.[32] These targets could be an employee's team, supervisor, coworkers, or any combination of such targets.[33] Other research has looked at the pattern of employees' individual affective, normative, and continuance commitment.[34] Reviews have uncovered that employees tend to have either low, moderate, or high levels of commitment across all three types. Moreover, some employees have patterns characterized by only high affective or normative commitment relative to other forms. Notably, this research suggests that these patterns of commitment greatly influence organizational outcomes.[35]

Perceived Organizational Support

perceived organizational support (POS) The degree to which employees believe an organization values their contribution and cares about their well-being.

Perceived organizational support (POS) is the degree to which employees believe that the organization values their contributions and cares about their well-being. People perceive their organizations as supportive when they are treated fairly by other organization members, have a high-quality relationship with the organization, and perceive their organization's practices to be supportive, developmental, and fair.[36] An excellent example is R&D engineer John Greene, whose POS is sky-high because CEO Marc Benioff and 350 fellow Salesforce.com employees covered all his medical expenses and stayed in touch with him throughout his recovery after he was diagnosed with leukemia. No doubt stories like this are part of why Salesforce.com was in the top ten of *Fortune*'s 100 Best Companies to Work For in 2020.[37]

power distance The degree to which people in a country accept that power in institutions and organizations is distributed unequally.

POS is a predictor, but there are some cultural influences.[38] POS is important in countries where the **power distance**, the degree to which people in a country accept that power in institutions and organizations is distributed unequally, is lower. In low-power-distance countries like the United States, people are more likely to view work as an exchange than a moral obligation. Employees in these countries look for reasons to feel supported by their organizations. It appears that U.S. organizations are obliging. One study of hundreds of thousands of U.S. employees tracked over thirty years indicated that POS has been steadily increasing over the years.[39] In high-power-distance countries like China, employee POS perceptions are not as deeply based on demonstrations of fairness, support, and encouragement.[40]

Employee Engagement

employee engagement The degree of enthusiasm an employee feels for the job.

Employee engagement is the degree of enthusiasm an employee feels for the job.[41] Employee engagement, in many ways, represents a combination of attitudes (e.g., satisfaction and commitment) but exceeds these, meaning something like "devotion" or giving your "heart and soul" to your work.[42] Highly engaged employees have a passion for their work and feel a deep connection to their companies. Disengaged employees have essentially checked out, putting time but not energy or attention into their work. Engagement becomes a real concern for most organizations because disengaged employees cost organizations money—one study suggests that organizations can lose up to $550 billion annually in lost productivity.[43] Employee engagement is related to job engagement, which we discuss in detail in Chapter 7.

Engagement levels determine many measurable outcomes. Reviews of employee engagement suggest that employee engagement is moderately related to employee and organizational performance. A study of nearly 8,000 business units in thirty-six companies found that teams whose employees reported high engagement levels achieved higher customer satisfaction levels, were more productive, brought in higher profits, and experienced lower levels of turnover and accidents than at other business units.[44] Job engagement is also critical in times of crisis. For instance, following the COVID-19 outbreak, researchers studied employees in their return to work in the epicenter of the outbreak: Wuhan, China.[45] These researchers found that job engagement was critical for reducing work withdrawal and increasing performance and even led to heightened safety compliance [e.g., the use of personal protective equipment (PPE) when required].

Can organizations and managers do anything to improve employee engagement? One meta-analysis suggests that the answer is yes.[46] Particularly useful were employee-focused interventions that focused on increasing employees' autonomy and resiliency, reduced job demands or made them easier to cope with, or contributed to employees' development (e.g., feedback, learning). Another study of over one hundred publicly traded companies found that organizations

can improve engagement by enhancing organizational practices (e.g., training), work attributes (e.g., clarity in roles, autonomy), and supervisor support.[47] There are several instances in which companies successfully improved employee engagement and, as such, experienced positive outcomes. For example, Molson Coors found engaged employees were five times less likely to have safety incidents. When an accident did occur, it was much less severe and less costly for an engaged employee than for a disengaged one ($63 per incident versus $392). As another example, Caterpillar increased employee engagement and recorded a resulting 80 percent drop in grievances and a 34 percent increase in highly satisfied customers.[48]

Job Attitudes in the Gig Economy

The nature of work is changing rapidly with the emergence of the Gig Economy, as we discussed in Chapter 1. When we think of all of the job attitudes we discussed up until this point, it is safe to assume that the more contact we have with the organization, the more consistent our attitudes become. For instance, a janitor who has worked at a company for twenty years probably has much more stable levels of job attitudes than a newly hired custodian navigating their job probation period. But with many jobs switching to temporary, contingent, or contract positions, one must wonder whether people develop job attitudes in these positions at all.

Job attitudes in the Gig Economy appear to be influenced by a number of factors, including stability of the work, characteristics of the temporary assignments, and the gig workers themselves.[49] As discussed earlier with organizational identification, personally fulfilling work for gig workers in which they develop socioemotional relationships with clients and client organizations is critical.[50] Furthermore, gig workers tend to be more satisfied with their jobs and more committed to the organizations they work with when they perceive employment to be stable and believe they can gain employment elsewhere fairly easily (if they had to).[51] One meta-analysis of hundreds of thousands of workers suggests that gig workers' job satisfaction is only slightly less than permanent workers.[52] However, it is clear from the results that *type* of gig worker matters: Temporary agency workers *do* experience substantial decrements in job satisfaction compared with other workers (including other gig workers). Similarly, temporary agency workers are also *less committed* to their organizations, their occupation, and their form of employment than permanent and self-employed individuals.[53]

With regard to other specific job attitudes, POS and organizational commitment have received the most attention. Returning to temporary agency workers, research has demonstrated that POS from the agency is critical for worker success in training, client perceptions of worker performance, and agency worker turnover and is even important for workers' perceptions of organizational commitment.[54] Like POS, commitment researchers have been fascinated with the idea that gig workers can work with multiple organizations and develop distinct job attitudes toward each company they work with. Multiple organizations (e.g., clients and employment agencies) lead to multiple opportunities for commitment to be impacted. Here, justice and ethics seem to be key: gig workers' perceptions of the organizations' fairness, that the organizations are fulfilling their obligations to them, and that the organizations do not see them as lesser in status are critical in developing gig-worker commitment, encouraging OCB, and discouraging gig-worker turnover.[55]

Are These Job Attitudes All That Distinct?

Such promising findings for job attitudes such as employee engagement have earned them a following in many business organizations and management consulting firms. However, the concept generates active debate about its usefulness, partly because of the difficulty of separating it from related constructs. For example, some note

that employee engagement has been used to refer at different times to various organizational phenomena, including psychological states, personality traits, and behaviors. They suggest, "The meaning of employee engagement is ambiguous among both academic researchers and among practitioners who use it in conversations with clients." Another reviewer called engagement "an umbrella term for whatever one wants it to be."[56] Another study found that many of the survey questions used to measure employee engagement are similar to those found in satisfaction, commitment, and involvement measures.[57] Other meta-analytic research suggests that the relationship between employee engagement and job attitudes is extremely strong, leading one to question whether they are measuring distinct concepts.[58] For the most part, research suggests that employee engagement predicts essential outcomes. For the most part, however, the amassed work to date calls into question how distinct it is from other job attitudes. Thus, there is still work to be done.

You might wonder whether job attitudes are, in fact, distinct. Indeed, there is some distinctiveness among job attitudes, and they can be reliably differentiated. However, suppose people feel like their work is central to their being (high job involvement) and identify strongly with their organization (high organizational identification). Isn't it probable that they like it too (high job satisfaction)? Won't people who think their organization is supportive also feel committed to it (strong organizational commitment)? Evidence suggests these attitudes *are* highly related, as mentioned in the prior section. They overlap significantly for various reasons, including the employee's personality. Generally, if you know someone's job satisfaction levels, you know most of what you need to know about how that person sees the organization. Next, we will consider the implications of job satisfaction and then job dissatisfaction.

Job Satisfaction

3-4 Identify the two approaches for measuring job satisfaction.

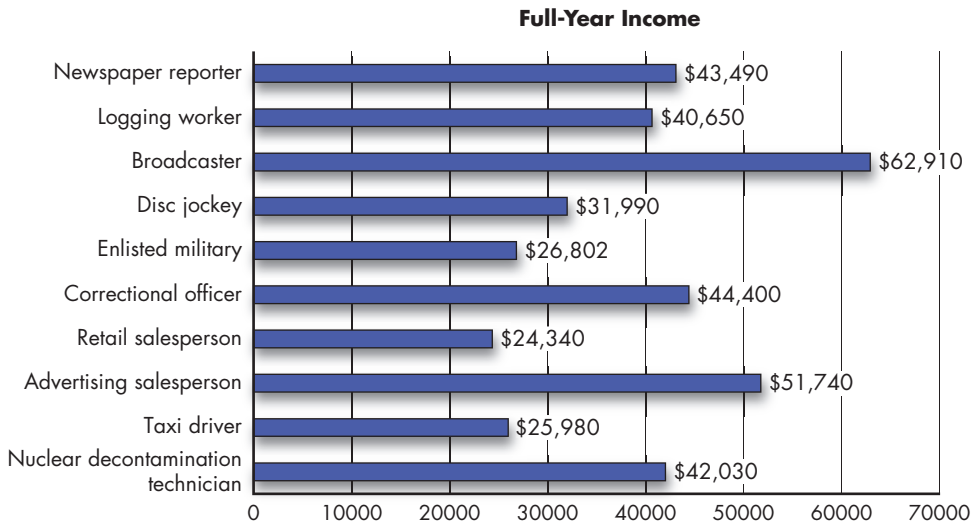
We have already discussed job satisfaction briefly. We know that it is one of the most critical job attitudes and predicts several important business outcomes. Now let's dissect the concept more carefully. If I am a manager and I want to get a better idea of how satisfied the people in my organization are, how do I measure job satisfaction? What causes an employee to have a high level of job satisfaction? How do satisfied employees affect an organization? Before you answer these questions, a look at the list of worst jobs for job satisfaction (Exhibit 3-2) may give you some indications. You may be surprised that they are not all low-paying jobs.

How Do I Measure Job Satisfaction?

Our definition of job satisfaction—a positive feeling about a job resulting from an evaluation of its characteristics—is broad. Yet that breadth is appropriate. A job is more than just shuffling papers, writing programming code, waiting on customers, or driving a truck. Jobs require interacting with coworkers and bosses, following organizational rules and policies, navigating organizational hierarchies, meeting performance standards, coping with less-than-ideal working conditions, adapting to new technology, and so forth. An employee's assessment of satisfaction with the job is a complex summation of many discrete elements. How, then, do we measure it?

Two approaches are popular. The single global rating is a response to one question, such as "All things considered, how satisfied are you with your job?" Respondents circle a number between 1 and 5 on a scale from "highly satisfied" to "highly dissatisfied." The second method, the summation of job facets,

Exhibit 3-2 Worst Jobs of 2019 for Job Satisfaction*



*Based on physical demands, work environment, income, stress, and hiring outlook.

Source: Based on CareerCast.com (2019), http://www.careercast.com/jobs-rated/worst-jobs-2019

is more sophisticated. It identifies key elements in a job, such as the type of work, skills needed, supervision, present pay, promotion opportunities, culture, and relationships with coworkers. Respondents rate each of these on a standardized scale (e.g., from 1 to 5, "dissatisfied" to "satisfied"). These ratings are then added to create an overall job satisfaction score.

Is one of these approaches superior? Summing up responses to several job factors seems, based on one's intuition, likely to achieve a more accurate evaluation of job satisfaction. Research does not entirely support this approach, however.[59] This is one of those rare instances in which simplicity seems to work as well as complexity, making one method essentially as valid as the other. Both methods can be helpful. The single global rating method is not very time-consuming, while the summation of job facets helps managers zero in on problems and deal with them faster and more accurately.

How Satisfied Are People in Their Jobs?

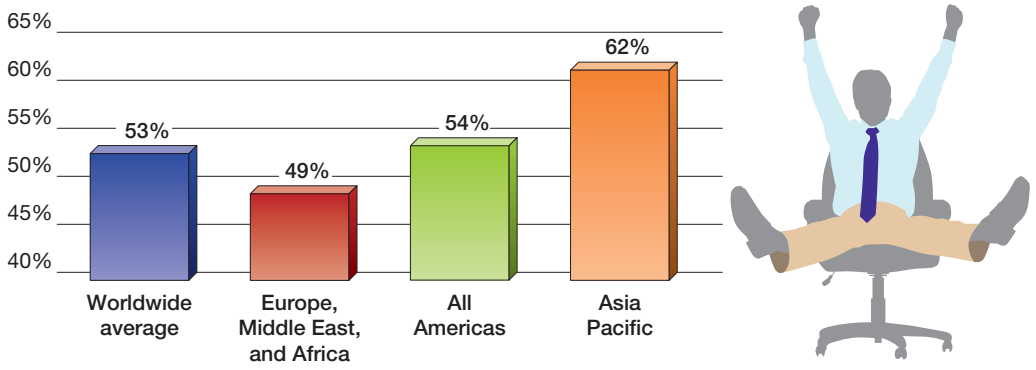
Are most people satisfied with their jobs? You may want to consider the OB Poll before you answer. Job satisfaction levels can remain relatively consistent over time. For instance, U.S. average job satisfaction levels were consistently high from 1972 to 2006.[60] However, economic conditions tend to influence job satisfaction rates. In late 2007, the Great Recession precipitated a drop-off in job satisfaction; the lowest point was in 2010, when 42.6 percent of U.S. workers reported satisfaction with their jobs.[61] Approximately 51 percent of U.S. workers reported satisfaction with their jobs in 2017.[62] However, the rebound was still far off from the 1987 level of 61.1 percent.[63] Job satisfaction rates tend to vary in different cultures worldwide. Of course, there are always competing measurements that offer alternative viewpoints.

The facets of job satisfaction levels can vary widely. As shown in Exhibit 3-3, people have typically been more satisfied with their jobs overall, the work itself, and their supervisors and coworkers than they have been with their pay and promotion opportunities.

OB POLL

Happy Places

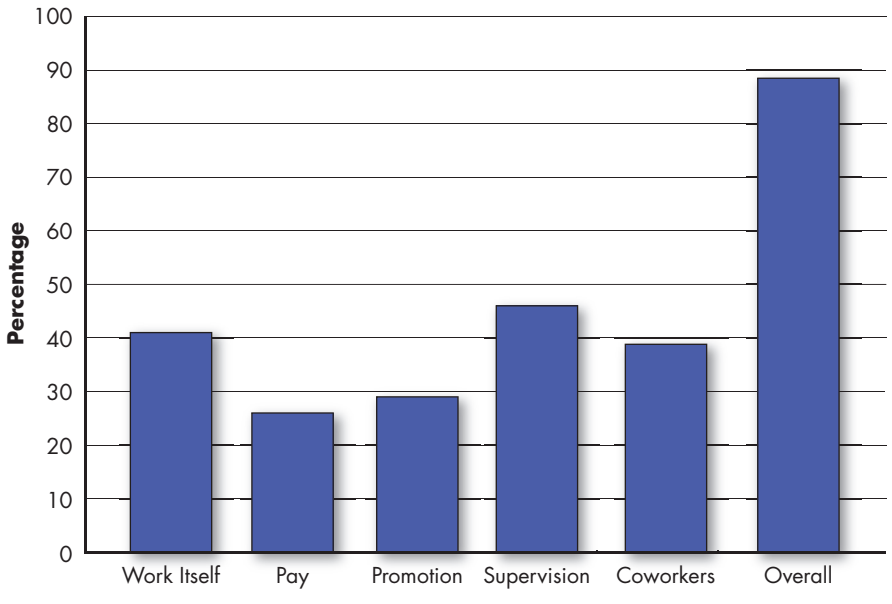
Percentage of 168,000 employees who responded YES to "Are you happy in your job?"



Sources: Based on Statista (2013), http://www.statista.com/statistics/224508/employee-job-satisfaction-worldwide/; Kelly Services Group (2012), http://www.kellyocg.com/uploadedFiles/Content/Knowledge/Kelly_Global_Workforce_Index_Content/Acquisition%20and%20Retention%20in%20the%20War%20for%20Talent%20Report.pdf

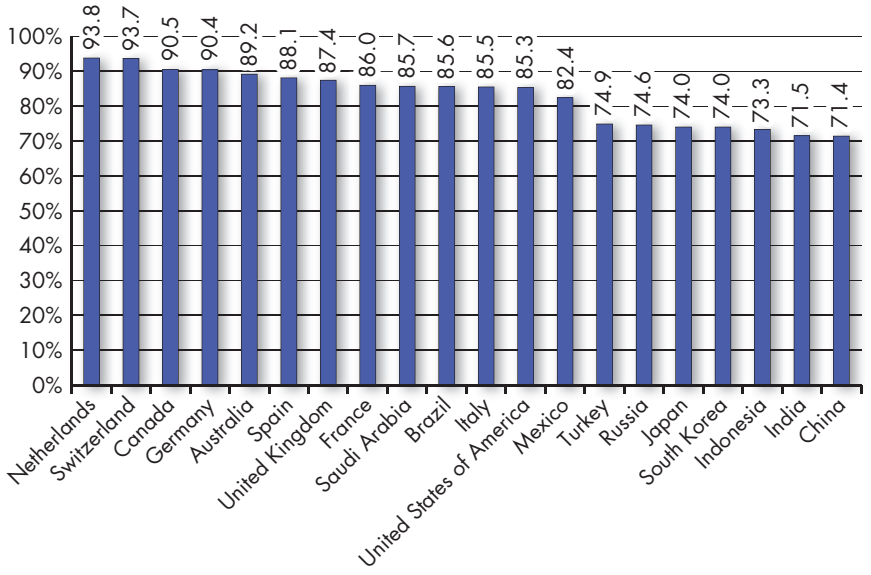
Furthermore, one review of dozens of studies with more than 750,000 participants suggests slight racial differences in job satisfaction: White employees tend to be slightly more satisfied than Black employees in general, especially in more complex jobs.[64] Regarding global differences in job satisfaction, Exhibit 3-4

Exhibit 3-3 Average Job Satisfaction Levels by Facet



Source: Society for Human Resource Management, *2017 Employee Job Satisfaction and Engagement: The Doors of Opportunity Are Open,* April 24, 2017, https://www.shrm.org/hr-today/trends-and-forecasting/research-and-surveys/pages/2017-job-satisfaction-and-engagement-doors-of-opportunity-are-open.aspx

Exhibit 3-4 Average Levels of Employee Job Satisfaction by Country



Source: J.-E. De Neve and G. Ward, "Happiness at Work," in J. Helliwell, R. Layard, and J. Sachs (eds.), *World Happiness Report* (World Happiness Report APPENDIX, 2017).

provides the results from the 2017 World Happiness Report and, more specifically, of the twenty countries with the largest economies. In these countries, over 70 percent of employees are satisfied with their jobs. It is difficult to discern all the factors influencing job satisfaction worldwide, but considering how businesses consider and address job satisfaction globally may provide an answer.

What Causes Job Satisfaction?

3-5 Summarize the main causes of job satisfaction.

Think about the best job you have ever had. What made it great? The reasons can differ significantly. Let's discuss some characteristics that likely influence job satisfaction, starting with job conditions.

Job Conditions

Generally, interesting jobs that provide training, variety, independence, and control satisfy most employees. Interdependence, feedback, social support, and interaction with coworkers outside the workplace are also strongly related to job satisfaction, even after accounting for the work's characteristics.[65] It goes without saying that toxic work environments lead to dissatisfied employees. For example, if you experience workplace racial discrimination, you are likely to become dissatisfied (and some research suggests you might even experience a decline in physical and psychological health).[66]



Employee engagement is high at Baptist Health of South Florida, where employees share a serious commitment to patient care and are passionate about the work they do. Looking at an electrocardiogram (EKG) readout, hospital employees Yaima Millan and Marvin Rosete feel their work is meaningful and can make a difference in patients' lives.
Source: Wilfredo Lee/AP Images

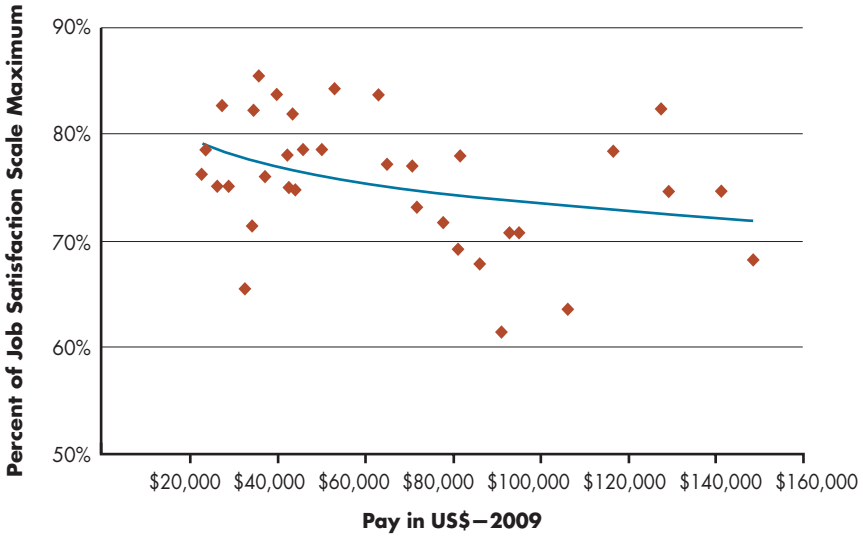
As you may have guessed, managers also play a big role in employees' job satisfaction. One review of nearly 70,000 employees from twenty-three countries found that the quality of exchange between the leaders and their employees is more strongly related to job satisfaction in more individualistic (e.g., Western) cultures than it is in more collectivistic (e.g., Asian) cultures.[67] Furthermore, "fitting in" matters for job attitudes worldwide. Another review of over one hundred studies in East Asia, Europe, and North America suggests that fitting in with your organization and job matters more in North America, whereas fitting in with your team or supervisor matters more in East Asia.[68]

Thus, job conditions—especially the intrinsic nature of the work itself, social interactions, and supervision—are important predictors of job satisfaction. Managers would do well to make sure the job conditions are satisfying enough to make employees happy. For example, HubSpot is listed as the number one best place to work in 2020, according to Glassdoor: one employee reemphasizes the value of DEI, noting that "HubSpot works hard to create a truly diverse and inclusive work environment where everyone can feel comfortable bringing their true selves to work."[69]

Personality and Individual Differences

As crucial as job conditions are to job satisfaction, personality also plays an important role.[70] People who have positive core self-evaluations (CSEs); see the chapter on personality and individual differences for further discussion—who believe in their inner worth and basic competence—are more satisfied with their jobs than people with negative CSEs. For those in collectivist cultures, those with high CSEs may realize particularly high job satisfaction.[71] Other individual characteristics matter for job satisfaction as well. For instance, research suggests that intelligent people tend to be more satisfied with their jobs, primarily because they seek out complex jobs that satisfy their intellectual curiosity.[72] Fit between the person and the job matters, too. One meta-analysis of research spanning sixty-five years demonstrated that people are more satisfied when their interests (e.g., a desire to make art) match their jobs (e.g., artist).[73]

Exhibit 3-5 Relationship Between Average Pay in Job and Job Satisfaction of Employees in That Job



Source: Based on T. A. Judge, R. F. Piccolo, N. P. Podsakoff, J. C. Shaw, and B. L. Rich, "The Relationship Between Pay and Job Satisfaction: A Meta-Analysis of the Literature," *Journal of Vocational Behavior* 77, no. 2 (2010): 157–67.

Pay

You have probably noticed that pay comes up often when people discuss job satisfaction. People often talk about whether they are satisfied with their pay, even comparing their income with other people's incomes (e.g., peers or the typical person who does their job). Income does correlate with job satisfaction and overall happiness for many people, and people do experience decrements in job satisfaction when they detect discrepancies with others.[74] Still, the effect (of both pay level and discrepancies with others) can be smaller once an individual reaches a standard level of comfortable living.[75] Look at Exhibit 3-5. It shows the relationship between the average pay for a job and the average job satisfaction level. As you can see, there is not much of a relationship. Money does motivate people, as we will discover in Chapter 8. But what motivates us is not necessarily the same as what makes us happy.

Outcomes of Job Satisfaction

3-6 Identify four outcomes of job satisfaction.

Having discussed some of the causes of job satisfaction, we now turn to specific outcomes.

Job Performance

As several studies have concluded, happy workers are more likely to be productive workers. Some researchers believed the relationship between job satisfaction and job performance was a myth, but a review of 300 studies suggested the correlation is quite robust.[76] Individuals with higher job satisfaction perform better, and organizations with more satisfied employees tend to be more effective than those with fewer.

Toward a Better World

Nvidians: Together Transforming Communities Around the World

Do employees care if their employers do anything to make a difference in the world? We often think about the impact employer corporate social responsibility, philanthropy, and sustainability have on the planet—but what about a company's own people and their job attitudes?

Nvidia, a Fortune 500 semiconductor manufacturer, plays a transformative role in the lives of Nvidians through their shared work to make the world a better place. Nvidia is an excellent example of how social responsibility can be woven into an organization's fabric. However, what makes Nvidia unique is the degree to which it includes employees in this mission. Employees at Nvidia appear to share the same propensity toward helping others (leading to organizational identification), strongly identify with their work (leading to job involvement), and—most importantly—feel *empowered* to make a difference in their communities.

For instance, Nvidia has one of the business world's only *employee-run* philanthropic foundations. Also, it holds a massive annual volunteer event in place of a holiday party. This event, which it has named Project Inspire, results in a turnout of thousands of Nvidians, tens of thousands of volunteer hours, and millions of dollars in donations annually. Discontent with holding Project Inspire as an annual event, Nvidians introduced a new initiative, Inspire 365, empowering employees with the flexibility to make any day a Project Inspire day. Nvidia offers its employees year-round gift matching and the flextime to volunteer, freeing Nvidians to flexibly address community needs and really take ownership of the process. As some examples, this flexibility has helped enable the Techsplorer program, empowering Nvidians to tutor and inspire children and familiarize them with artificial intelligence. In the wake of COVID-19, this program has also encouraged employees to perform more than 23,000 small actions to combat the pandemic in their own communities (with 100 percent of its offices participating globally). These actions appear to have had a strong effect on job attitudes. With 95 percent of Nvidians responding, one survey found that 96 percent agree that they are making a difference globally, and 90 percent agreed that Nvidia was a great place to work.

Although Nvidia is an excellent case of how organizations can genuinely involve and empower employees to make the world a better place, what about organizations that do not follow through with their promises? Sadly, Nvidia appears to be an exception rather than the rule. In one study of organizations' values and whether they actually live up to those values across 500 organizations, the researchers found no relationship between the two. Research demonstrates that when organizations exhibit a disconnect between what they say and what they actually do, employees may pick up on this, which can harm organizational identification and job attitudes. On the other hand, as we see from Nvidia, research suggests that organizations that put what they say into action increase employees' respect and pride in their organizations, lead them to engage in OCBs, and form a collective effort to make the world a better place.[77]

Organizational Citizenship Behavior (OCB)

It seems logical that job satisfaction should be a substantial determinant of an employee's organizational citizenship behavior (known as OCB or citizenship behavior; see Chapter 1).[78] OCBs include people talking positively about their organizations, helping others, and going beyond their jobs' typical expectations. Evidence suggests job satisfaction *is* moderately correlated with OCB; people who are more satisfied with their jobs are more likely to engage in citizenship behavior.[79]

Why does job satisfaction lead to OCB? One reason is trust. Research in 18 countries suggests that managers reciprocate employees' OCB with trusting behaviors of their own.[80] Individuals who feel that their coworkers support them are also more likely to engage in helpful behaviors than those with antagonistic coworker relationships.[81]



Service firms like Air Canada understand that satisfied employees increase customer satisfaction and loyalty. As frontline employees who have regular customer contact, the airline's ticket agents are friendly, upbeat, and responsive while greeting passengers and helping them with luggage check-in and seat assignments.
Source: Aaron Harris/Bloomberg/Getty Images

Customer Satisfaction

Because customer satisfaction is a critical outcome in the service industry, it is reasonable to ask whether employee satisfaction is related to positive customer outcomes. For employees with regular customer contact, the answer appears to be yes. Satisfied employees appear to increase customer satisfaction and loyalty.[82]

Several companies are acting on this evidence. Online shoe retailer Zappos is so committed to finding customer service employees who are satisfied with the job that it offers a $2,000 bribe to quit the company after training. The logic is that the least satisfied will take the cash and go.[83] Zappos employees are empowered to "create fun and a little weirdness" to ensure that customers are satisfied, and it works: Of the company's more than 24 million customers, 75 percent are repeat buyers. For Zappos, employee satisfaction has a direct effect on customer satisfaction.

Life Satisfaction

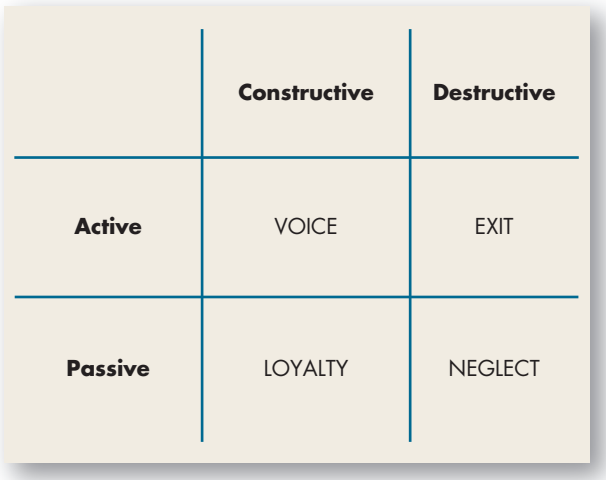
Until now, we have treated job satisfaction as if it were separate from life satisfaction, but they may be more related than you think.[84] Furthermore, life satisfaction decreases when people become unemployed, according to research in Germany, not just because of income loss.[85] For most individuals, work is an integral part of life, and many people derive meaning from the roles they fulfill.[86] Therefore, it makes sense that our overall happiness depends in no small part on our happiness in our work (our job satisfaction).

The Impact of Job Dissatisfaction

3-7 Identify four employee responses to job dissatisfaction.

What happens when employees dislike their jobs? One theoretical model—the exit–voice–loyalty–neglect framework—helps us understand the consequences of dissatisfaction. Exhibit 3-6 illustrates employees' four responses to job dissatisfaction, which differ along two dimensions: constructive/destructive and active/passive. The responses are as follows:[87]

Exhibit 3-6 Responses to Dissatisfaction



exit Dissatisfaction expressed through behavior directed toward leaving the organization.

voice Dissatisfaction expressed through active and constructive attempts to improve conditions.

loyalty Dissatisfaction expressed by passively waiting for conditions to improve.

neglect Dissatisfaction expressed through allowing conditions to worsen.

- **Exit**. *The exit response* directs behavior toward leaving the organization, including looking for a new position or resigning. To measure the effects of this response to dissatisfaction, researchers study individual terminations and *collective turnover*, the total loss to the organization of employee knowledge, skills, abilities, and other characteristics.[88]
- **Voice**. *The voice response* includes actively and constructively attempting to improve conditions, including suggesting improvements, discussing problems with superiors, and undertaking union activity.
- **Loyalty**. *The loyalty response* means passively but optimistically waiting for conditions to improve, including speaking up for the organization in the face of external criticism and trusting the organization and its management to "do the right thing."
- **Neglect**. *The neglect response* passively allows conditions to worsen and includes chronic absenteeism or lateness, reduced effort, and an increased error rate.

Exit and neglect behaviors are linked to performance variables such as productivity, absenteeism, and turnover. But this model expands employee responses to include voice and loyalty—constructive behaviors that allow individuals to tolerate unpleasant situations or improve working conditions. The model helps us understand employee responses in various situations. For instance, union members often express dissatisfaction through the grievance procedure or formal contract negotiations. These voice mechanisms allow them to continue in their jobs while acting to improve the situation.

As helpful as this framework is, it is quite general. We next address behavioral responses to job dissatisfaction.

Counterproductive Work Behavior (CWB)

counterproductive work behavior (CWB) Actions that actively damage the organization, including stealing, behaving aggressively toward coworkers, or being late or absent.

Substance abuse, stealing at work, endless scrolling on social media while on the clock, gossip, absenteeism, and tardiness are examples of destructive behaviors to organizations. They are indicators of a broader syndrome called **counterproductive work behavior (CWB)**, also termed deviant behavior in the workplace or simply employee withdrawal (see Chapter 1).[89] Like other

behaviors we have discussed, CWB does not just happen—the behaviors often follow negative and sometimes long-standing attitudes. Therefore, if we can identify the predictors of CWB, we may lessen the probability of its effects.

Generally, job dissatisfaction predicts CWB.[90] People who are not satisfied with their work become frustrated, which lowers their performance[91] and makes them more prone to CWB.[92] However, some research also suggests that this relationship might be stronger for men than for women, as men tend to exhibit more aggressiveness and less impulse control.[93] Our immediate social environment also matters. One German study suggests that we are nudged toward CWB by our work environment's norms. For example, individuals in teams with high absenteeism are more likely to be absent themselves.[94] CWB can also be a response to abusive supervision from managers, which then increases the abuse, thus starting a vicious cycle.[95]

One crucial point about CWB is that dissatisfied employees often choose one or more specific behaviors due to idiosyncratic factors. One worker might quit. Another might use work time to browse social media or take work supplies home for personal use. In short, workers who do not like their jobs "get even" in various ways. Because those ways can be quite creative, controlling only one behavior with policies and punishments leaves the root cause untouched. Employers should seek to correct the source of the problem—the dissatisfaction—rather than try to control the different responses.

According to some research, sometimes CWB is an emotional reaction to perceived unfairness—a way to try to restore an employee's sense of equity exchange.[96] Therefore, CWB has complex ethical implications. For example, is someone who takes a box of markers home from the office for their children acting ethically? Some people consider this stealing. Others may want to look at moderating factors such as the employee's contribution to the organization before they decide. Does the person generously give extra time and effort to the organization with little thanks or compensation? If so, they might see CWB as part of an attempt to "even the score."

As a manager, you can take steps to mitigate CWB. For instance, you can poll employee attitudes, identify areas for workplace improvement, and attempt to measure CWB. Several reviews suggest that self-assessments of CWB can be just as useful as reports from coworkers or supervisors, partly because of differences in the observability of CWB.[97] Creating strong teams, integrating supervisors within them, providing formalized team policies, and introducing team-based incentives may help lower the CWB "contagion" that reduces the group's standards.[98]

Absenteeism We find that unsatisfied employees tend to be absent more often, but the relationship is not very strong.[99] Generally, when numerous alternative jobs are available, dissatisfied employees have high absence rates, but when there are few alternatives, dissatisfied employees have the same (low) rate of absence as satisfied employees.[100] Another factor is how guilty you would feel if you were absent; one study of customer service agents found that employees who were more prone to feeling guilty were less likely to be absent.[101]

Turnover The relationship between job satisfaction and turnover is stronger than between satisfaction and absenteeism.[102] Overall, a pattern of lowered job satisfaction is the best predictor of turnover. Turnover also has a workplace environment connection too. If most of the other employees in the immediate workplace are also dissatisfied, there may be a contagion effect. This suggests that managers should consider job satisfaction (and turnover) patterns of coworkers when assigning workers to a new area.[103]

Myth or Science?

Happy Workers Means Happy Profits

There are exceptions, of course, but this statement is basically correct. A glance at Fortune's Best Companies to Work For list, where companies are chosen by the happiness inducements they provide, reveals recognizable profit leaders: Hilton, SAS, Edward Jones, and REI, to name a few. However, all happiness is not created equal.

An employee who is happy because their coworker did most of the work on their team's project is not necessarily going to work harder, for instance. Some happiness-inducers also seem unrelated to profit increases, such as Google's bowling alley and Salesforce.com's off-the-charts parties. Traditional benefits programs also do not necessarily yield higher job satisfaction, productivity, and profits. Research indicates that employees highly value paid time off, a retirement plan such as a 401(k), and lower health premiums. But many companies offer these benefits and are nowhere near the Fortune 500 organizations in profits.

It turns out that the value of keeping happiness in the profit equation may be felt in the level of employee engagement. As Julie Gebauer, a managing director for consulting firm Towers Watson, said, "It's not just about making them happy—that's not a business issue. Engagement is." Job engagement "represents employees' commitment... and the level of discretionary effort they are willing to put forth at work," wrote Jack in the Box's Executive VP Mark Blankenship. Happy employees with higher job engagement are willing to work hard, make customers happy, and stay with the company—three factors that affect the bottom line in a big way. Conversely, a review of 300 studies revealed that turnover rates resulting from poor attitudes or low engagement led to poorer organizational performance.

So the moral of the story seems to be this: Treat others as we want to be treated in the workplace. It is just good business.[104]

The satisfaction–turnover relationship is affected by alternative job prospects. If an employee accepts an unsolicited job offer, job dissatisfaction was less predictive of turnover because the employee more likely left in response to "pull" (the lure of the other job) than "push" (the unattractiveness of the current job). Similarly, job dissatisfaction is more likely to translate into turnover when other employment opportunities are plentiful. Likewise, even employees who are satisfied with their jobs may be more likely to leave when there are high amounts of job insecurity.[105] When employees have high "human capital" (high education, high ability), job dissatisfaction is more likely to translate into turnover because they have, or perceive, many available alternatives.[106]

Some factors help break the dissatisfaction–turnover relationship. Employees' *embeddedness*—connections to the job and community[107]—can help lower the probability of turnover, particularly in collectivist (group-oriented) cultures.[108] Embedded employees seem less likely to want to consider alternative job prospects. This is because embedded employees are motivated to protect the resources they have acquired as a result of their attachment to the job, organization, or community.[109] However, if employees are embedded in a toxic environment, they may feel "stuck" in a negative situation, which can have adverse consequences for physical and psychological health.[110]

Managers Often "Don't Get It"

Given the evidence we have just reviewed, it should come as no surprise that job satisfaction can affect the bottom line. One study by a management consulting firm separated large organizations into high morale (more than 70 percent of employees expressed overall job satisfaction) and medium or low morale (fewer than 70 percent) groups. Companies' stock prices in the high-morale group grew 19.4 percent compared with 10 percent for the

medium- or low-morale group. Furthermore, companies listed within the "100 Best Companies to Work for in America" generated 2.3 to 3.8 percent higher stock returns annually than other firms during the 1984 to 2011 range.[111] Despite these results, many managers are unconcerned about employee job satisfaction.

Others overestimate how satisfied employees are, so they do not think there is a problem when there is. In one study of 262 large employers, 86 percent of senior managers believed their organizations treated employees well, but only 55 percent of employees agreed; another study found that 55 percent of managers thought morale was good in their organization compared to only 38 percent of employees.[112] Regular surveys can reduce gaps between what managers *think* employees feel and what they *really* feel. A gap in understanding can affect the bottom line in small franchise sites and large companies. As manager of a KFC restaurant in Houston, Jonathan McDaniel surveyed his employees every three months. Some results led him to make changes, such as giving employees greater say about which workdays they had off. However, McDaniel believed the process itself was valuable. "They really love giving their opinions," he said. "That's the most important part of it—that they have a voice and that they're heard." Surveys are no panacea, but if job attitudes are as important as we believe, organizations need to use every reasonable method to find out how job attitudes can be improved.[113]

Summary

Managers should be interested in their employees' attitudes because attitudes influence behavior and indicate potential problems. Creating a satisfied workforce is hardly a guarantee of successful organizational performance, but evidence strongly suggests that managers' efforts to improve employee attitudes will likely result in positive outcomes, including greater organizational effectiveness, higher customer satisfaction, and increased profits.

Implications for Managers

- Of the major job attitudes—job satisfaction, job involvement, organizational commitment, POS, and employee engagement—remember that an employee's job satisfaction level is the best single predictor of behavior.
- Pay attention to your employees' job satisfaction levels as determinants of their performance, turnover, absenteeism, and withdrawal behaviors.
- Measure employee job attitudes at regular intervals to determine how employees are reacting to their work.
- To raise employee satisfaction, evaluate the fit between each employee's work interests and the intrinsic parts of the job; then create work that is challenging and interesting to the individual.
- Consider the fact that high pay alone is unlikely to create a satisfying work environment.

Earning That Promotion May Be Key to Higher Job Satisfaction

POINT

Who would not want to be promoted? Promotions usually mean higher pay, greater job autonomy, and authority. As one of the facets of the Job Descriptive Index (JDI), opportunities for promotion are in fact linked to job satisfaction. Not only does research show that a promotion can have the same positive impact on job satisfaction as a 69 percent increase in wages, even just believing you may receive a promotion can have an even stronger effect on job satisfaction. These findings may have a significant impact on reducing turnover as research shows that job satisfaction is a key predictor of whether an employee decides to leave or stay in a position.

Likewise, individuals who believed a promotion was possible in the next two years were more likely to remain at the same organization. More and more employees, particularly millennials and Gen Xers, consider career advancement opportunities to be important to job satisfaction. While people often associate higher pay with higher employee satisfaction, pay is not as important as other facets of job satisfaction. In fact, dissatisfied workers have been found more likely to cite a lack of advancement opportunities rather than low pay as a reason for job dissatisfaction. A great example of the impact of promotions and advancement opportunities is Bain & Company, an organization consistently ranked among the best places to work. The company has also been ranked among the top ten companies for working mothers, attributing this ranking to the sponsorship and training programs geared toward helping women to advance and achieve their professional goals.

COUNTERPOINT

Yes, opportunities for promotion can lead to higher job satisfaction, but of the five facets of the JDI, it is not the most predictive. Furthermore, a recent study of 2,500 U.S. workers found that job security and the work environment were most important to job satisfaction. More specifically, coworkers and immediate supervisors influenced the job satisfaction of more than half of those surveyed. In addition, even in the cases when promotions have a positive impact on job satisfaction, any positive effect soon fades away within three to four years after the promotion is received.

There is even some research that points to gender differences in job satisfaction after a promotion. Results from these studies support the "glass-ceiling" hypothesis that not only is it more difficult for women to attain management positions, but women face greater obstacles as they are promoted to upper-management positions. If organizations are serious about closing the gender gap in managerial representation, investigating gender differences in job satisfaction is key, specifically focusing on individuals who are promoted to upper and lower managerial levels. Moreover, when developing gender-inclusive practices, organizations often propose solutions such as more work flexibility and promotion opportunities. However, as the research demonstrates, a promotion may not be enough. Getting to the top may just be half the battle, as women may encounter push-back with others questioning their authority and minimizing their contributions.

Regardless of gender, employees may also find that a promotion does not match their expectations. A new role may mean greater authority and higher pay. On the other hand, it may also mean more hours than expected, and the increase in pay may not be enough to make up for the demands of the job. Thus, it should not be assumed that promotions will necessarily lead to more satisfied and fulfilled employees.[114]

CHAPTER REVIEW

QUESTIONS FOR REVIEW

3-1 What are the three components of attitudes?

3-2 Does behavior always follow from attitudes?

3-3 What are the major job attitudes?

3-4 How do we measure job satisfaction?

3-5 What causes job satisfaction?

3-6 What are the outcomes of job satisfaction?

3-7 How do employees respond to job satisfaction?

APPLICATION AND EMPLOYABILITY

Job satisfaction, job involvement, employee engagement, organizational commitment, and perceived organizational support all affect how you, your coworkers, and your boss behave and perform in the workplace. First, the job attitudes of your work unit also affect the bottom line—attitudes affect customer service and sales performance. Second, job attitudes and satisfaction can be assessed in a variety of ways to keep a "pulse" on the workforce of your organization. Third, knowledge of what causes job attitudes and the consequences/outcomes of job attitudes can help you set policies, practices, and procedures (when you are in a supervisory position) or engage in behaviors (if you are an employee) that will help you improve attitudes in your workplace. In this chapter, you improved your critical thinking skills and considered various situations relevant to social responsibility in the workplace, including whether happy workers lead to improved profit margins, how organizations can increase organizational identification through empowerment the pitfalls and benefits of office gossip and venting, and whether promotions matter for job satisfaction. In the following section, you will continue to improve your critical thinking skills and apply your knowledge about job attitudes to managing political views in the office, examine the ethics of employee tell-all websites, consider the decision small business owners had to make in the wake of the COVID-19 pandemic, and evaluate carefully how several large organizations improve their employees' job satisfaction.

EXPERIENTIAL EXERCISE Managing Political Views in the Office

Students should be divided into pairs, assigned to the role of either the supervisor or employee, and given their respective role instructions. After students are given a few minutes to read through their role instructions, tell students they should now engage in a role play, doing their best to adopt the role to which they have been assigned (approximately 10 to 15 minutes).

Supervisor Role Instructions

You are a supervisor of a team that you have noticed has conflicting political views. While you refrain from sharing your own political views or engaging in political discussions in the workplace, you have noticed that one employee in particular frequently initiates these conversations. While it does not appear that the employee is misusing their time, as the conversations usually take place during breaks, you believe that it is making some employees uncomfortable. You decide it is time to sit down with the employee and have a one-on-one conversation. It is up to your discretion whether you decide to not allow any political discussions or choose a different approach.

Employee Instructions

You are an employee who has been working at your current company for two years. During that time, you have developed close relationships with the other individuals on your five-person work team. You would consider yourself to be politically active and passionate about politics. Although you have conversations about politics at work, you are careful to only have these during breaks to ensure they do not interfere with your work. Some of the other individuals on your team are also passionate about politics, so you do not see an issue with these discussions, particularly as the conversations are, for the most part, civil and respectful. As a result, you are surprised when your supervisor requests to meet with you.

When students have completed the role-play exercise, have them discuss the following questions. Lastly, as a whole class, have at least a few students share their responses to the debrief questions.

Questions

3-8. If you were playing the role of the supervisor, how did you address the situation? What factors influenced how you handled the situation?

3-9. If you were playing the role of the employee, how did you respond during the conversation with your supervisor? Did you agree with how the supervisor handled the situation? Why or why not?

ETHICAL DILEMMA Tell-All Websites

"Arrogant, condescending, mean-spirited, hateful… and those traits describe the nicest people at Netflix," writes one anonymous employee. "Management is awful… good old boys club," writes a Coca-Cola market development manager. And the reviews keep rolling in; Coca-Cola has 5,700 employee reviews, and some companies, like Google, have more than double that number on Glassdoor, one of the Internet sites that allows anyone to rate their employers.

Websites like Glassdoor are thriving; employees increasingly join the forums and seem to relish the chance to speak freely. Glassdoor is useful for both employers and employees as they are empowered to express their opinions and any concerns while employers can utilize Glassdoor as a monitoring tool. Valuable ratings and feedback can be utilized to inform organizational decision-making, learning and development, and company culture.

Organizations are aware that people watch what they say when they can be identified, and many have used anonymous job attitude surveys for this reason. Still, evaluations from these surveys are often more glowing, and less detailed, than anonymous website feedback. Some organizations have therefore altered the frequency and scope of surveys to obtain more depth. Others have their own intranet platforms to solicit concerns and complaints.

Beyond the ethicality of posting reviews online—details that you might not share in person—issues of organizational ethics come into play. While companies like Visa, Boeing, and Hewlett-Packard have tried to discourage employees from anonymously venting on websites and apps, such mandates may violate the employees' right of free speech. And how anonymous are anonymous posts? Posts on Glassdoor and other forums eliminate a person's name, but might supervisors be able to determine which subordinate posted the comments on occasion, and perhaps even retaliate?

Grant Gochnauer, cofounder of a digital marketing agency in Chicago, has been successful in obtaining candid answers from his employees through polls taken several times each week. "It's sometimes a little bit scary," he said, asking himself, "Do I really want to know the answer to this?"

Questions

3-10. Do you think employees have a right to say what they want to about their organizations online as opposed to in private?

3-11. How would you react if you learned one of your employees posted unflattering comments about you as a manager? Would your reaction be any different if the employee posted unflattering comments about you as a person?

3-12. Do you feel it is acceptable to post comments anonymously, or do you think people should include their names? Why or why not?[115]

CASE INCIDENT Jobs, Money, and Satisfaction

When two caretaker jobs were advertised on the tiny island of Great Blasket, Ireland's most westerly point, there was no shortage of interest; it drew responses from applicants from Alaska to South Africa. But this was no high-paying job on a luxury resort island. The position was described as intense and tough, with no electricity, Wi-Fi, or hot showers, and life described as "back to basics," involving candles, stoves, wildlife, and nature. The posts included free accommodation and food, but it is unlikely the applicants were particularly interested in the pay or benefits. The previous post holders had left jobs in Dublin and a demanding work commute for what they considered their dream job. No doubt many of the applicants also saw it as a once-in-a-lifetime opportunity.

Of a like mind as those applicants for the caretaker jobs, Elsa was a high-flying executive who discovered that she had more important priorities in life than money. At the end of yet another late and stressful night working as an investment banker, she finally decided there was more to life. Elsa quit her job of 20 years, and six months later she was teaching in a primary school. "I feel refreshed," she said. "I love teaching, genuinely enjoy my work and have had more holidays in the last year than I managed in the previous ten." As for money, Elsa earns less than one quarter of what she used to as an investment banker.

It's not just in the pursuit of dream jobs where people are willing to forgo money. One study reported that 49 percent of the 2,000 employees it surveyed were prepared to take a reasonable pay cut for a more flexible work schedule. Fifty-six percent said they would take a pay cut for better health benefits. Another report collected data from German, French, UK, and U.S. employees and found that those who were happy with their jobs cited meaningful work—not compensation—as the most important factor.

It seems millennials may even sacrifice money simply to get a better job title. The CEO of an employment agency claimed she had seen millennial candidates forgo nearly €10,000 in salary for what they consider a more valuable title.

But Peter Weber, an industrial designer, makes an interesting point: "There is no way I could consider taking a pay cut. I have a family to take care of and bills to pay. It's only a choice for people who already have enough money." Money may not be everything in life, but it ***is*** something.[116]

Questions

3-13. If you could choose a highly paid job that you didn't like or your dream job that paid comparatively little, which would you choose, and why?

3-14. What other factors are important to you besides compensation?

3-15. Explore the possible causes of Elsa's job dissatisfaction as an investment banker, why she is more satisfied as a teacher, and the likely outcomes of her newly found job satisfaction.

4

Emotions and Moods



Source: Lm Otero/AP/Shutterstock

LEARNING OBJECTIVES

After studying this chapter, you should be able to:

- **4-1** Differentiate between emotions and moods.
- **4-2** Identify the sources of emotions and moods.
- **4-3** Show the impact emotional labor has on employees.
- **4-4** Describe affective events theory.
- **4-5** Describe emotional intelligence.
- **4-6** Identify strategies for emotion regulation.
- **4-7** Apply concepts about emotions and moods to specific OB issues.

Employability Skills Matrix (ESM)

	Myth or Science?	An Ethical Choice	Point/ Counterpoint	Toward a Better World	Experiential Exercise	Ethical Dilemma	Case Incident
Critical Thinking & Creativity	✓	✓	✓	✓	✓	✓	✓
Communication	✓		✓	✓			✓
Collaboration							✓
Self-Management	✓		✓		✓		✓
Social Responsibility	✓			✓		✓	
Leadership		✓	✓	✓	✓	✓	
Career Management	✓					✓	✓

BRINGING YOUR SENSE OF HUMOR TO WORK

Southwest Airlines is known for its distinctive, unconventional culture. Apart from its unique ways of doing things, Southwest Airlines also prioritizes its employees. The company's philosophy is that employees will treat customers well if they are also treated well and that, in the end, it will benefit the business. Throughout its forty-four-year history, the company has cultivated a culture that is both inclusive and fun. Southwest's core values include "Don't take yourself too seriously" and "Don't be a jerk." The late founder and CEO, Herb Kelleher, exemplified these values. Kelleher was not afraid to make fun of himself and demonstrated that you should not have to leave your sense of humor at the office door. Leaders like Kelleher who have a sense of humor have been found to be 27 percent more motivating and admired than those without one. Kelleher himself believed that the intangibles were often more important than the tangibles. In his mind, a competitor could easily buy the tangibles, like faster airplanes, but excellent customer service or an organizational culture could not be purchased. The runway toward these intangibles is through allowing employees to express themselves authentically.

As a result of this culture, Southwest flight attendants have become well known for expressing their sense of humor and spreading joy among employees and customers alike. Although Southwest is not known for having the most luxurious in-flight experience, the employees still make it an enjoyable experience for customers. For example, employees have set up

and played "gate games" to entertain customers when there are flight delays. The airline also has flight attendant announcements that resemble comedy sketches. Southwest's philosophy seems to be working. Glassdoor listed Southwest as one of the top twenty-five places to work in 2021. Research also supports the company's approach, demonstrating that workplaces in which employees feel comfortable expressing their feelings are more likely to be creative, innovative, and productive. In this environment, employees are more likely to be friendly with one another, which significantly impacts employee performance.

The organization's commitment to employee and customer well-being continued during the COVID-19 pandemic. Since its beginnings in 1971, the company has never had to institute layoffs. However, Southwest (and the rest of the airline industry) faced incredible financial challenges in the pandemic's wake. With the threat of layoffs and pay cuts looming, employees experience extreme uncertainty and job insecurity. This insecurity can lead them to experience burdensome negative emotions resulting in emotion regulation difficulties. Demonstrating the company's commitment to employees, CEO Gary Kelly reduced his base salary to zero and instituted a 20 percent cut in senior executives' pay to reduce and hopefully avoid layoffs.[1]

Employee emotions cannot be separated from work. They can enhance the employee and customer experience just as well as they can curtail it. Given the obvious role emotions play in our lives, it might surprise you that the field of organizational behavior (OB) has not given emotions much attention until relatively recently. Why? Historically, researchers, theorists, and practitioners thought emotions would be detrimental to performance. Although managers knew emotions were an inseparable part of everyday life, they tried to create emotion-free organizations. Researchers tended to focus on strong negative emotions—especially anger—that interfered with an employee's ability to work effectively.

Thankfully, this type of thinking has changed with the advent of the "Affective Revolution" in OB that is still underway.[2] Indeed, some emotions can hinder performance, particularly those exhibited at the wrong time. Other emotions are neutral, and some are constructive. Employees bring their emotions to work every day, so no study of OB would be comprehensive without considering the role of emotions in workplace behavior.

What Are Emotions and Moods?

4-1 Differentiate between emotions and moods.

Emotions can greatly influence our attitudes toward others, our decision making, and our behaviors. They can even spark conflict with potentially disastrous consequences. For example, after being told to "stop being a crybaby," one Florida Taco Bell employee threw a hot bean burrito at the supervisor, snapped their headset in two, and stormed out of the building.[3] In truth, we are human and cannot set aside our emotions, but we *can* acknowledge and work with them. And not all emotions have negative influences on us. For example, Fausto

Martinez was delighted after finding out about Amazon's minimum wage hike. Martinez looked forward to a better quality of life, more time with family, and the lack of a need for a second full-time job.[4] By increasing the minimum wage, Amazon improved the quality of life of its employees and stayed competitive with regard to retaining them.

First, we need to discuss three closely intertwined terms: *affect, emotions,* and *moods.* **Affect** is a generic term covering a broad range of feelings, including emotions and moods.[5] **Emotions** are intense, discrete, and short-lived, often caused by a specific event.[6] **Moods** are longer-lived and less intense feelings than emotions. They often arise without a specific event acting as a stimulus.[7] Exhibit 4-1 shows the relationships among affect, emotions, and moods.

affect A term used to describe a broad range of feelings that people experience, including emotions and moods.

emotions Intense, discrete, and short-lived feeling experiences, often caused by a specific event.

moods Feelings that tend to be longer-lived and less intense than emotions and that lack a contextual stimulus.

As the exhibit shows, affect is a broad term that encompasses emotions and moods. Affect varies by its valence, or the degree to which the feelings are positive (e.g., excited, happy, joyous) or negative (e.g., sad, angry, frustrated). Second, there are differences between emotions and moods. Emotions are more likely to be caused by a specific event and are more fleeting than moods.

Positive and Negative Affect

As a first step toward studying moods and emotions in the workplace, we classify affect into two categories: positive and negative. Positive emotions—such as joy and gratitude—express a favorable evaluation or feeling. Negative emotions—such as anger and guilt—express the opposite. We can think of **positive affect** (PA) as a dimension consisting of positive emotions such as excitement, enthusiasm, and elation at the high end (high positive affect). **Negative affect** (NA) is a dimension consisting of nervousness, stress, and anxiety at the high end (high negative affect).[8]

positive affect An affective dimension that consists of specific positive emotions such as excitement, enthusiasm, and elation at the high end.

negative affect An affective dimension that consists of emotions such as nervousness, stress, and anxiety at the high end.

Exhibit 4-2 illustrates *the affective circumplex,* which categorizes and arranges emotions by their degree of positivity and negativity.[9] In Exhibit 4-2, solid black lines directly correspond with PA and NA (e.g., emotions that directly correspond with PA or NA). For example, elated is a high positive affect emotion,

Exhibit 4-1 Affect, Emotions, and Moods

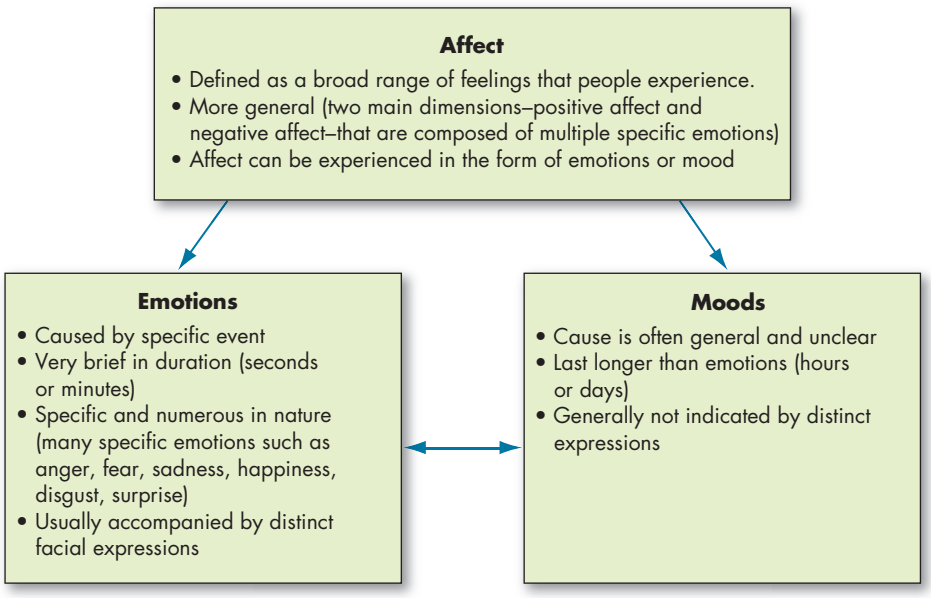
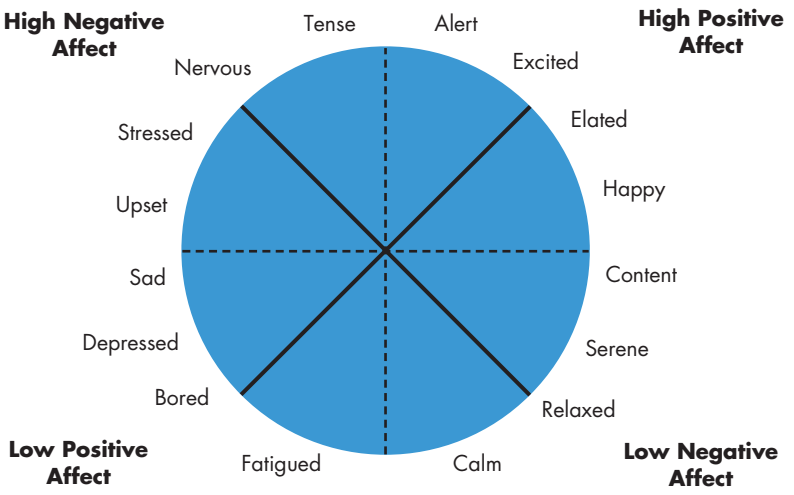


Exhibit 4-2 The Affective Circumplex



while bored is a low positive affect emotion. Nervous is a high negative affect emotion, while relaxed is a low negative affect emotion. Finally, some emotions are "in between." The dotted lines, on the other hand, demonstrate that some emotions can be simultaneously high or low in PA or NA. For example, upset and sad are simultaneously low positive affect and high negative affect, while happy and content are simultaneously high positive affect and low negative affect.

You will notice that this model does not include all emotions. Some, such as surprise, do not fit well because they are not as clearly positive or negative. Also, keep in mind that emotions cannot be neutral. Being neutral is being nonemotional.[10] As described later in the chapter, people differ in how much they experience PA and NA. Some (we might call them *affectively intense*) may strongly experience quite a bit of high positive and high negative affect in a matter of days or weeks.[11] Others might experience little of either. And still, some people may tend to experience one much more predominately than the other.[12]

The Basic Emotions

You might be wondering, how many emotions are there? There are dozens—including anger, contempt, enthusiasm, envy, fear, frustration, disappointment, embarrassment, disgust, happiness, hate, hope, jealousy, joy, love, pride, surprise, and sadness. Numerous researchers have tried to limit them to a fundamental set.[13] Other scholars argue that by thinking in terms of "basic" emotions, we lose sight of the bigger picture because emotions can mean different things in different contexts and may vary across cultures.[14] It is unlikely that psychologists or philosophers will ever completely agree on a set of basic emotions or even on whether there is such a thing. Still, many researchers agree on six universal emotions—anger, fear, sadness, happiness, disgust, and surprise.[15] If you have ever held a job before, you can probably think of times when you have experienced these emotions in the workplace. For example, you might experience negative affect after a lousy performance review from your supervisor at the department store where you work. You might be angry with your boss, fearful of being terminated, or surprised that the supervisor gave you such a poor evaluation.

Psychologists have tried to identify basic emotions by studying how we express them. Facial expressions have proved difficult to interpret.[16] One problem is that some emotions are too complex to be easily represented on our faces. Second, although people can, for the most part, recognize emotions across cultures at better-than-chance levels, this accuracy is worse for cultural groups with less exposure to one another.[17] Employees can also vocally express their emotions, and artificial intelligence (AI) is advancing research in this area. For example, one machine learning (see introductory chapter) study of speeches from one hundred professional actors across various English-speaking countries found that people are better at recognizing actors' emotions from the same country, suggesting that there are dialect differences in verbally expressing emotions.[18] Differentiating emotions across cultures is quite important in this era of globalization; you may find yourself communicating with people from radically different cultures. Understanding the nuances in how they express emotion can be very helpful. Studying how emotions are displayed, educating yourself on culture-specific emotions, and paying attention to cues when interacting with people from other cultures can help you become a better cross-cultural communicator.[19]

Moral Emotions

Some emotions are closely tied to our interpretations of the events that evoke them. One area in which researchers have been furthering this idea is through the study of **moral emotions**, that is, emotions that have moral implications because of our instant judgment of the situation that evokes them.[20]

moral emotions Emotions that have moral implications because of our instant judgment of the situation that evokes them.

Say you watched a video of a coworker making a sexist or racist slur. You might feel disgusted because it offends your sense of right and wrong. You might feel a variety of emotions based on your moral judgment of the situation.[21] Other examples of moral emotions include sympathy for others' suffering, guilt about our immoral behavior, anger about injustice done to others, and contempt for those who behave unethically. Therefore, we need to be aware of the moral aspects of situations that trigger our emotions and make certain we understand the context before we act, especially in the workplace.[22]

Research indicates that our responses to moral emotions differ from our responses to other emotions.[23] When we feel moral anger, we may be more likely to confront the situation that causes it than when we just feel angry. For instance, emergency room doctors and hospital specialists who deal with crises daily found that observing others' suffering led them to experience sympathetic moral emotions and advocate for the patient.[24] In contrast, other doctors' unethical behaviors led fellow doctors to become angry and sanction them. However, we cannot assume that our emotional reactions to events will be the same as someone else's. Children develop moral emotions during childhood as they learn moral norms and standards, so moral emotions depend on the situation and normative context more so than other emotions. Because morality differs from one culture to the next, so do moral emotions.

People previously believed that most ethical decision making relied on thinking and cognition. Research on moral emotions increasingly questions this perspective. Numerous studies suggest that ethical decisions are primarily based on feelings rather than on thoughts, even though we tend to see moral issues as logical and reasonable, not as emotional.[25] To some degree, our beliefs are shaped by the groups to which we belong, which influence our perceptions of ethics in certain situations. Unfortunately, these shared perceptions may lead us to justify purely emotional reactions as rationally "ethical" just because we share them with others.[26] We also tend to judge (and punish) outgroup members (anyone who is not in our group) more harshly for moral transgressions than

ingroup members, even when we are trying to be objective (see the chapter on diversity).[27] Also, we tend to glorify ingroup members (anyone who is part of our group), exercising more leniency when judging their misdeeds, often leading to an ethics double standard.[28]

You can think about this research to see how moral emotions operate in your own life. Consider a time when you have done something that hurt someone else. Did you feel angry or upset with yourself? Or think about a time when you have seen someone else treated unfairly. Did you feel contempt for the person acting unfairly, or did you engage in a cool, rational calculation of the situation's fairness? Most people who think about these situations have some sense of an emotional stirring that might prompt them to engage in ethical actions like donating money to help others, apologizing and attempting to make amends, or intervening on behalf of those who have been mistreated. In sum, we can conclude that behaving ethically at least partially involves making decisions based on emotions and feelings.

Emotions can be fleeting, but moods can endure, and for quite a while. To understand the impact of emotions and moods in organizations, we next classify the many distinct emotions into broader mood categories.

Experiencing Moods and Emotions

As if it were not complex enough to consider the many distinct emotions a person might experience, the reality is that we all experience moods differently as well. For most people, positive moods are somewhat more common than negative moods. Indeed, research finds nearly universal evidence for a **positivity offset**, meaning that at zero input (when nothing in particular is going on), most individuals experience a mildly positive mood.[29] The positivity offset appears for employees in a wide range of job settings. For example, one study of customer service representatives in a British call center revealed that people reported experiencing positive moods 58 percent of the time despite the stressful environment.[30] Furthermore, negative emotions tend to lead to negative moods. Perhaps this happens because people think about events that created strong negative emotions five times as long as events that created strong positive ones.[31]

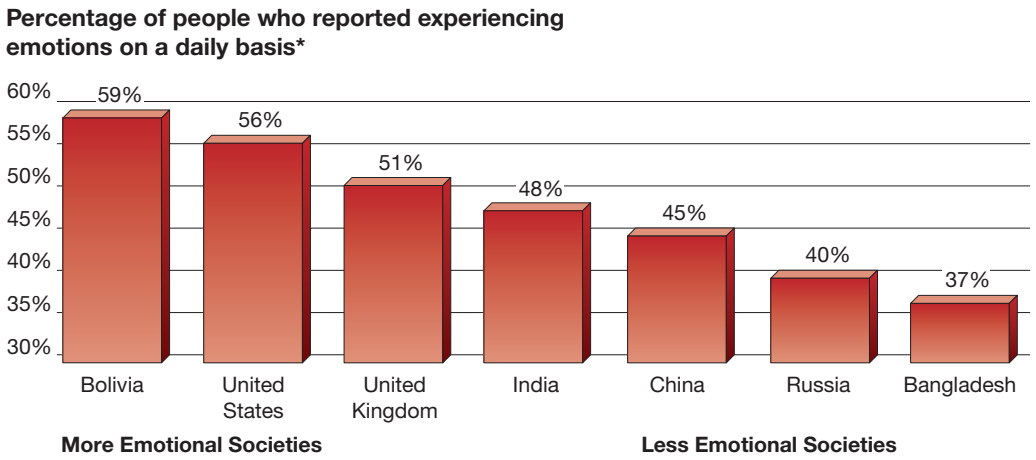
positivity offset The tendency of most individuals to experience a mildly positive mood at zero input (when nothing in particular is going on).

Does the degree to which people experience positive and negative emotions vary across cultures? Yes (see the OB Poll). The reason is not that people of various cultures are inherently different. People in most cultures appear to experience many positive and negative emotions similarly, and people interpret them in much the same way worldwide.[32] We all view negative emotions such as hate, terror, and rage as dangerous and destructive. We desire positive emotions such as joy, love, and happiness. However, an individual's experience of emotions appears to be culturally shaped.[33]

Some cultures value certain emotions more than others, which leads individuals to change their perspective on experiencing these emotions.[34] For instance, many cultures, such as Mexico and Brazil, emphasize positive emotions and expressions.[35] However, some cultures, such as Japan and Russia, embrace negative emotions as useful and constructive. Interestingly, negative emotions are less detrimental to the health of those of Eastern (negative emotion valuing) as opposed to Western cultures.[36] In support, research suggests valuing negative affect often allows people to accept present circumstances and cope, reducing the adverse effects on physical and psychological health and decision making.[37] Negative affect may also allow managers to think more critically and fairly.[38] However, differences in what is considered *ideal affect* across cultures can have significant implications for workplace diversity. For instance, a series of studies comparing European Americans and Hong Kong Chinese found that European Americans conveyed more PA emotions in their job applications

OB POLL

Emotional States



*Respondents in 148 countries worldwide during 2014 were asked whether they experienced five positive (well-rested, treated with respect, enjoyment, smiling and laughing, learning or doing something interesting) and five negative emotions (anger, stress, sadness, physical pain, worry) daily. Select countries are represented in this figure.

Source: Based on J. Clifton, "Latin Americans Lead World in Emotions," Gallup (August 27, 2015), http://www.gallup.com/poll/184631/latin-americans-lead-world-emotions.aspx

and remote interviews than Hong Kong Chinese.[39] Furthermore, European American hiring managers rated their ideal applicant as displaying more PA emotions and were more likely to hire applicants who displayed these emotions for internships.[40]

Now that we have identified the basic emotions, the basic moods, and our experience of them, let's explore the function of emotions and moods, particularly in the workplace.

The Function of Emotions

In some ways, emotions are a mystery. What function do they serve? As we will discuss, a large number of reviews suggest that positive employee emotions tend to enhance job attitudes, job engagement, job performance, and organizational citizenship behavior (OCB); decrease withdrawal and counterproductive work behaviors (CWBs); and lead employees to experience more success than their unhappy counterparts.[41] Better yet, individuals who tend to experience positive affect consistently as part of their personalities (see the chapter on personality and individual differences) tend to enjoy these positive outcomes long-term.[42]

Do Emotions Make Us Irrational? How often have you heard someone say, "Oh, you're just being emotional"? You might have been offended. Observations like this suggest that rationality and emotion are in conflict and that by exhibiting emotion, you are acting irrationally. The perceived association between the two is so strong that some researchers argue that displaying emotions such as sadness to the point of crying is so toxic to a career that we should leave the room rather than allow others to witness it.[43] This perspective suggests that the demonstration or even experience of emotions can make us seem weak, brittle, or irrational. However, our emotions can make our thinking *more* rational. Why? Because our emotions provide essential information about how we understand

the world around us and help guide our behaviors. For instance, individuals in a negative mood may be better able to discern truthful from inaccurate information than are people in a happy mood.[44] Furthermore, cold rationality does not acknowledge that in the world around us people are, by nature, emotional. We would do best to recognize and understand our own emotions (and others') and use this information in our interactions with others.

When we can identify the sources of emotions and moods, we can better predict behavior and manage our interactions with people more effectively. Let's explore that topic next.

Sources of Emotions and Moods

4-2 Identify the sources of emotions and moods.

It's 8:15 a.m. on Monday, and you are so incredibly excited to tell your coworker, Jordan, the good news about the shiny Pokémon you caught in Pokémon Go. You rush over, but Jordan immediately stops you and says, "Don't even talk to me until I've had my coffee." Defeated, you walk back to your station and continue your opening activities. You wonder where this bad mood originated and begin to feel angry toward your coworker. You mutter under your breath, "I won't trade the extra shiny Pokémon I caught with Jordan. We will see who's upset then!" We have all, no doubt, been in a similar situation before. Negative emotions and moods are often unavoidable and can certainly impact our work. Jordan hurt your feelings, harming the floor team's functioning that day; now you may be preoccupied with what Jordan said and miss one of your opening tasks. We are often left wondering where these emotions and moods originated. Was it really the lack of coffee? Maybe something else was going on. Here we discuss some of the primary influences on emotions and moods.

Personality

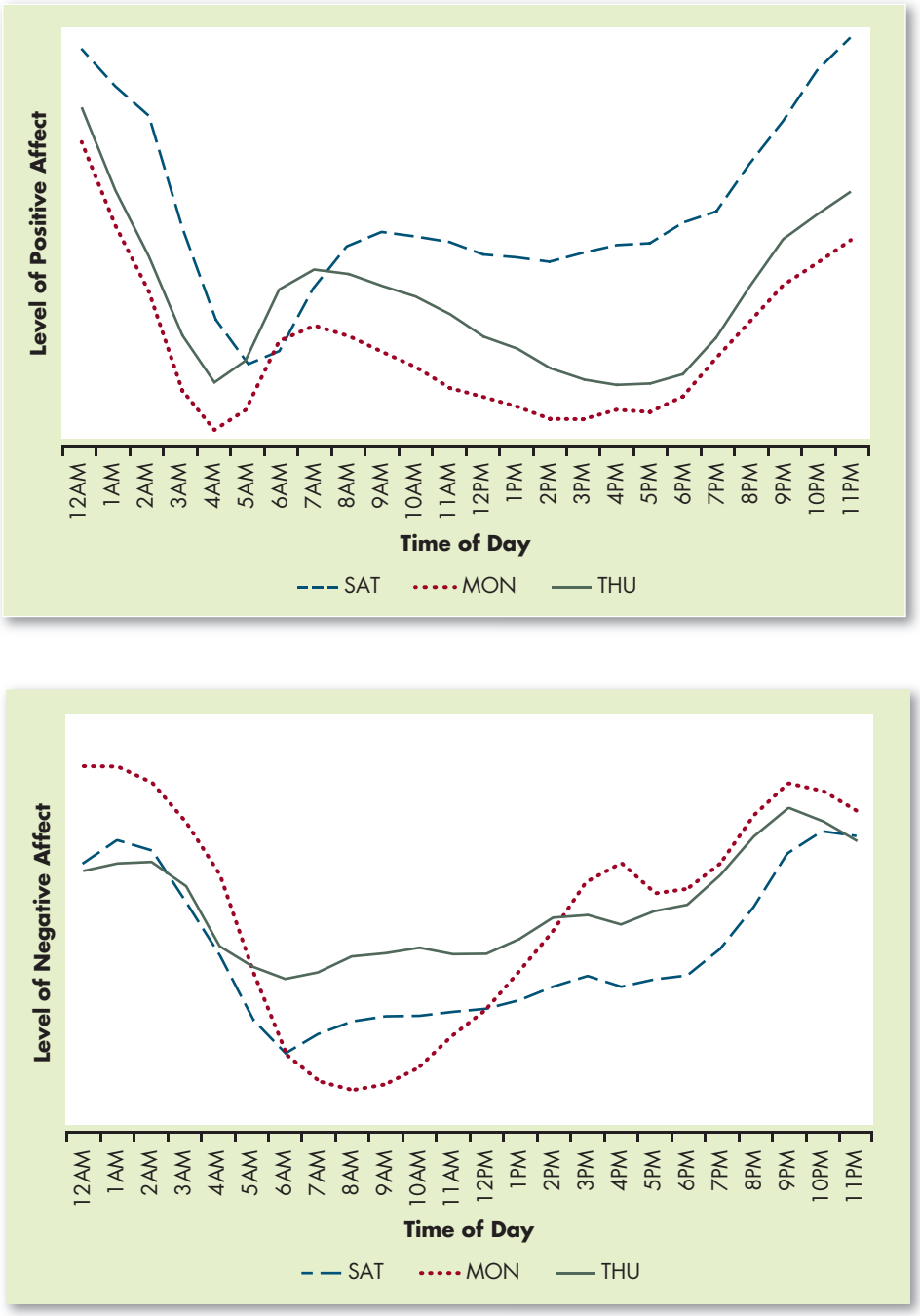
Affect has a personality trait component, meaning that some people have built-in tendencies to experience certain moods and emotions more frequently than others. Is Jordan frequently prone to experiencing negative emotions? It could be that Jordan's reaction is a reflection of personality. People also experience the same emotions with different intensities; the degree to which they experience them is called their **affect intensity**.[45] Affectively intense people experience both positive and negative emotions more deeply: When they are sad, they are really sad, and when they are happy, they are really happy. Both the tendency to experience positive and negative emotions and the intensity at which we feel them affect several factors at work, such as our typical moods, job satisfaction, and engagement at work (see the chapter on attitudes and job satisfaction).[46] For example, one review of more than one hundred studies suggests that the tendency to experience positive emotions and moods is the strongest predictor of whether an employee is engaged.[47]

affect intensity Individual differences in the strength with which individuals experience their emotions.

Time of Day

Maybe it was just too early for Jordan to interact with coworkers. Indeed, research does show that moods vary by the time of day. Furthermore, most of us follow the same pattern. On a typical weekday, levels of positive affect tend to rise in the morning after sunrise, peaking in the late morning (ten o'clock to noon) and then slowly decline until early evening (around six o'clock). Then positive affect switches direction and increases until midnight. Afterward, the trajectory switches direction again and declines until sunrise.[48] As for negative affect, most research suggests it fluctuates less than positive affect.[49] However, the general trend is for it to increase over the day, so it is lowest early in the morning and highest late in the evening.[50] A fascinating study assessed the effect of time

Exhibit 4-3 Time of Day Effects on U.S. Adults' Affect From Tweets



Note: Based on analysis of U.S. tweets (i.e., Twitter postings) and coding of words that represent positive (e.g., delight, enthusiasm) and negative (e.g., fear, guilt) affect. Lines represent the percentage of total words in tweets that convey these emotions.

Sources: Based on S. A. Golder and M. W. Macy, "Diurnal and Seasonal Mood Vary With Work, Sleep, and Daylength Across Diverse Cultures," *Science* 333 (2011): 1878–81; A. Elejalde-Ruiz, "Seize the Day," *Chicago Tribune,* September 5, 2012, downloaded June 20, 2013, from http://articles.chicagotribune.com/

of day on affect by analyzing millions of tweets (i.e., Twitter messages) worldwide.[51] The researchers captured words connoting positive affect (e.g., happy, enthused, excited) and negative (e.g., sad, angry, anxious) affect. You can see the trends they observed in the positive affect part of Exhibit 4-3.

You may wonder what happens for people who work the third shift at night. When our internal circadian process is out of line with our waking hours, our moods and well-being are likely to be negatively affected. However, researchers studying how the body's inner clock can be adjusted have found that governing our exposure to light may allow us to shift our circadian rhythms.[52] Thus, by manipulating light and darkness, someone who is awake at night might have a similar mood cycle to someone who sleeps at night.

Day of the Week

Was this just a case of the "Mondays" for Jordan? In most cultures, Mondays can be…"problematic" for employees—for example, as shown in Exhibit 4-4, U.S. adults tend to experience their highest positive affect on Friday, Saturday, and Sunday and their lowest on Monday.[53] This tends to be true in several other cultures. This is not the case in all cultures, however. In Japan, positive affect is higher on Monday than on either Friday or Saturday.[54]

As for negative affect, Monday is the highest negative-affect day across most cultures.[55] However, in some countries, negative affect is lower on Friday and Saturday than on Sunday. It may be that while Sunday is enjoyable as a day off (and thus we have higher positive affect), people also get a bit stressed about the week ahead (which is why negative affect is higher).

Weather

Maybe Jordan was feeling a little…"under the weather." Many people believe that their mood is tied to the weather, and indeed, there are many self-proclaimed "rain haters" and "summer lovers."[56] However, an extensive body of evidence suggests weather has little effect on mood, at least for most people.[57] **Illusory correlation**, which occurs when we associate two events that, in reality, have no connection, explains why people tend to *think* weather influences them. For example, employees may be more productive on bad weather days, a study in Japan and the United States demonstrated, but not because of mood. Instead, the worse weather removed some work distractions.[58]

illusory correlation The tendency of people to associate two events when in reality there is no connection.

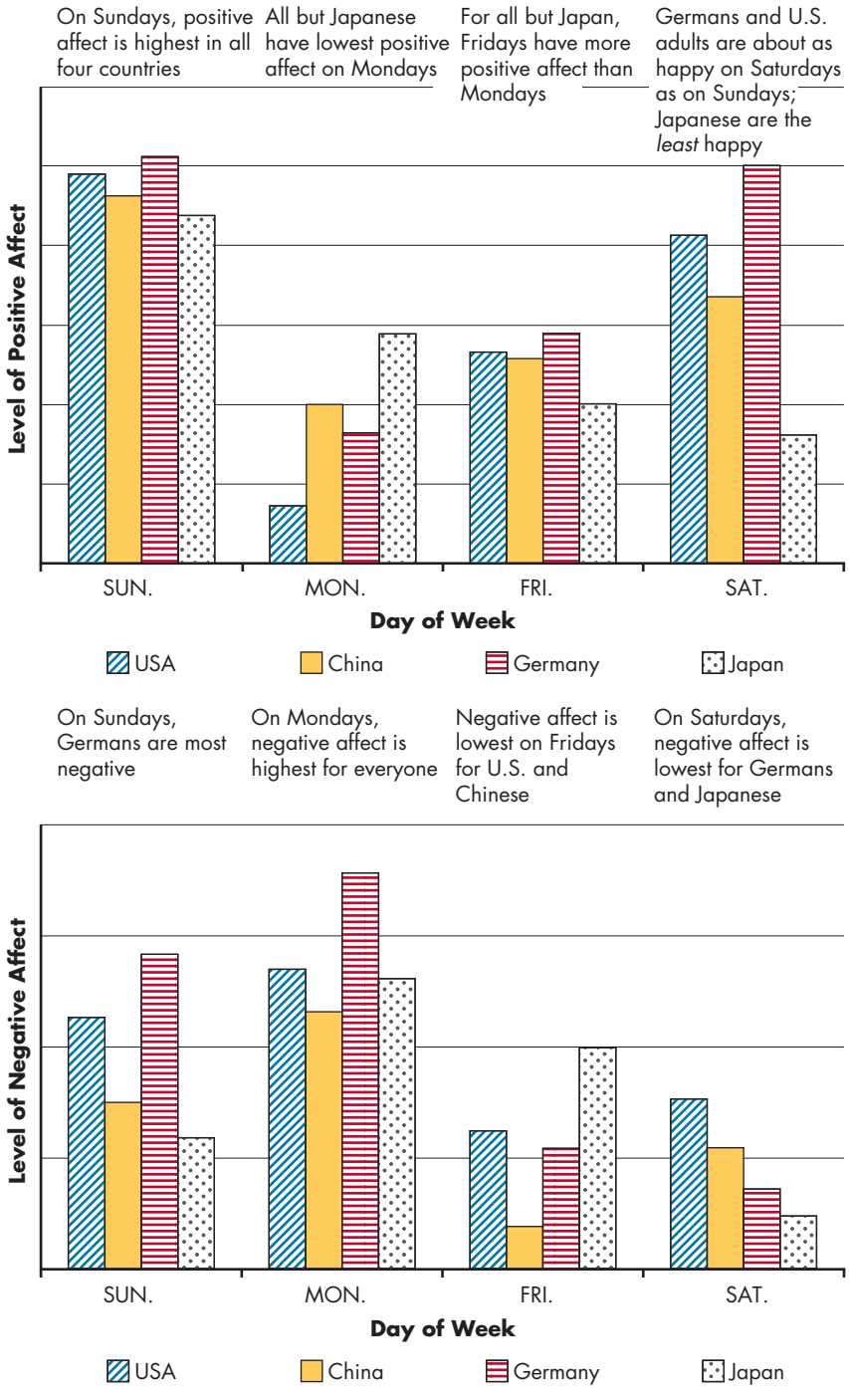
Stress

Maybe Jordan was anxious about a worrisome meeting with the manager later that afternoon. As you might imagine, stressful events at work (a nasty e-mail, impending deadline, loss of a big sale, reprimand from the boss, etc.) negatively affect our emotions and moods (which we discuss in more detail in the chapter on organizational health and stress). As the authors of one study note, "A constant diet of even low-level stressful events has the potential to cause workers to experience gradually increasing levels of strain over time."[59] Mounting levels of stress can worsen our moods as we experience more negative emotions. Although sometimes we thrive on it,[60] most of us find stress usually takes a toll on our mood. In fact, when situations are overly emotionally charged and stressful, we have a natural response to disengage, to literally look away.[61]

Social Interactions

Just as Jordan may have had a negative interaction with the supervisor early in the day, so too were you affected by your interaction with Jordan. Indeed the interactions we have with other people can affect our emotions and moods. These negative experiences can also, by consequence, affect our relationships with others, leading to strengthened or dissolving bonds between people.[62] As an example, negative interactions at work not only can affect your emotions at work, they are so powerful that these emotions can "spill over" and affect your relationships with family members.[63] Social interactions also do not solely result

Exhibit 4-4 **Day-of-Week Mood Effects Across Four Cultures**



Source: Based on S. A. Golder and M. W. Macy, "Diurnal and Seasonal Mood Vary With Work, Sleep, and Daylength Across Diverse Cultures," *Science* 333 (2011): 1878–81; A. Elejalde-Ruiz, "Seize the Day," *Chicago Tribune,* September 5, 2012, downloaded June 20, 2013, from http://articles.chicagotribune.com/

in purely positive or negative emotions. For instance, in lukewarm, tepid interactions with people, we may be bored and less motivated to make or maintain a relationship. On the other hand, interactions that take us on "an emotional roller coaster" (e.g., experience both positive and negative social interactions frequently) can lead us to feel bittersweet or conflicted about that person.[64]

Sleep

Maybe Jordan was extremely tired that morning due to a lack of sleep (and, hence, the need for coffee). Apparently, the world could use more sleep, with roughly 62 percent of adults from twelve countries reporting in 2019 that they do not sleep well or long enough.[65] Adults report sleeping less than adults did a generation ago.[66] Data mined from millions of users of the "Sleep Cycle" app suggest that on average, sleep length and quality have diminished over the years.[67]

Sleep quality affects moods and decision making, and increased fatigue puts workers at risk of disease, injury, and depression.[68] Poor or reduced sleep also leads to emotional changes, makes it difficult to control emotions, and can impair job satisfaction.[69] On the positive side, increased regular sleep can reduce the negative effects of fatigue and stress on employees' emotions.[70] Furthermore, University of California–San Diego researchers calculated that, for employees who do not sleep enough, "a one-hour increase in long-run average sleep increases wages by 16 percent, equivalent to more than a year of schooling."[71]

Exercise

To deal with the negative emotions surrounding your interaction with Jordan, have you considered exercising after work (maybe play some more Pokémon Go)? Perhaps you have heard that people should exercise to improve their mood. Does "sweat therapy" really work? It appears so. Research consistently shows that exercise enhances people's positive moods and reduces perceptions of fatigue.[72] Exercise can also help protect against persistent negative moods and improve the ability to recover from negative experiences.[73]

Gender Identity

You may think that Jordan's behavior may be attributable to gender differences in emotions. Indeed, many people may stereotypically believe women are more emotional than men (see the chapter on diversity). Although several reviews have found differences in emotion display across genders that tend to increase with age,[74] these tend to be trivial or small and likely reflect differences in upbringing and stereotypes or even the way emotions are measured rather than actual differences.[75]

Unfortunately, these stereotypical perceptions of women as "emotional" and men as "angry" persist in the workplace despite little evidence that they are true. For example, a Denver police commander filed a civil rights complaint



Staples believes that exercise increases positive moods and results in happier, healthier, and more productive employees. At company headquarters, the office supply retailer offers employees onsite strength training and cardiovascular conditioning classes during their lunch hour, including a truck push (shown here), military crawls, and other boot-camp-type activities.
Source: Pat Greenhouse/*Boston Globe*/Getty Images

against the city for gender discrimination, noting that the chief told her she was "emotional" and "immature," denying her a promotion to deputy chief.[76] People also tend to make attributions about women's personalities in ways that might be based on stereotypes of typical emotional reactions. One study showed that when viewing pictures of faces, participants interpreted the women's emotional expressions as being dispositional (related to personality), whereas the men's expressions were interpreted as situational.[77] For example, a picture of a sad woman led observers to believe she had an emotional personality, whereas a picture of sadness in a man was more likely to be attributed to having a bad day.

Let us put together what we have learned about emotions and moods with workplace coping strategies, beginning with emotional labor.

Emotional Labor

4-3 Show the impact that emotional labor has on employees.

If you have ever had a job in retail or in sales or waited on tables in a restaurant, you know the importance of projecting a friendly demeanor and smiling. Even though there were days when you did not feel cheerful, you knew management expected you to be upbeat when dealing with customers, so you either tried to become upbeat and cheerful or otherwise faked it.

When you work, you expend physical and mental labor (or energy) by putting your body and mind, respectively, into your job. But jobs also require **emotional labor**, an employee's expression of organizationally desired emotions during interpersonal transactions at work.[78] Emotional labor is a key component of effective job performance.[79] We expect flight attendants to be cheerful, funeral directors to be sad, and doctors to be emotionally neutral.

emotional labor An employee's organizationally desired emotions during interpersonal transactions at work.

Controlling Emotional Displays

The way we experience an emotion is obviously not always the same as the way we show it. To analyze emotional labor, we divide emotions into *felt* or *displayed emotions*.[80] **Felt emotions** are our actual emotions.[81] In contrast, **displayed emotions** are those the organization requires workers to show and considers appropriate in each job. For instance, research suggests that in U.S. workplaces, it is expected that employees should typically display positive emotions like happiness and excitement and suppress negative emotions like fear, anger, disgust, and contempt.[82]

felt emotions An individual's actual emotions.

displayed emotions Emotions that are organizationally required and considered appropriate in a given job.

Effective managers have learned to look serious when they give an employee a negative performance evaluation and to look calm when they are berated by their bosses because the organization expects these displays. Conversely, effective employees have learned to earn their managers' favor (and perhaps pay raises and promotions) by enthusiastically agreeing with their supervisors.[83] Of course, there are no display rules for many workplace situations. Does your employer dictate what emotions you display when you are, say, heading out for lunch? Probably not. Many workplaces have explicit display rules, but usually only for interactions that matter, particularly between employees and customers. Regarding employee and customer interactions, you might expect that the more an employer dictates salespeople's emotional displays, the higher the sales. Employees under very high or very low display rules do not perform as well in sales situations as employees who have moderate display rules and a high degree of discretion in their roles.[84] Furthermore, informal display rules can also be biased. For instance, research uncovered a stereotype that Black grocery store workers were perceived as less warm than White workers, leading Black grocery store workers to engage in more emotional labor (by displaying more positive emotions) than White workers.[85] In other words, Black workers were held to a higher customer service standard because of the stereotype.

surface acting Hiding one's feelings and forgoing emotional expressions in response to display rules.

deep acting Trying to modify one's true feelings based on display rules.

Displaying fake emotions requires us to suppress real ones. **Surface acting** is hiding feelings and emotional expressions in response to display rules. A worker who smiles at a customer even when they do not feel like it is surface acting. **Deep acting** is trying to modify our true feelings based on display rules. Surface acting deals with *displayed* emotions, and deep acting deals with *felt* emotions. The COVID-19 context and proliferation of virtual/remote work have made the nature of surface and deep acting even more complex. In other words, with fewer face-to-face interactions, can people even tell whether emotions are authentic? One study in the COVID-19 era found that e-mail can be better for "masking" emotional leakage, although it is a double-edged sword because recipients view "richer" forms of communication like Zoom as conveying the "authenticity' of emotions better. On the other hand, for surface actors, a middle ground is better (e.g., telephone).[86]

Displaying emotions we do not really feel can be exhausting because they take effort to display and can make us feel inauthentic.[87] Surface acting is associated with increased stress and decreased job satisfaction.[88] Daily surface acting can also lead to emotional exhaustion at home, work–family conflict, absenteeism, and insomnia.[89] On the other hand, deep acting has a positive relationship with job satisfaction (especially when the work is challenging), job performance, and even better customer treatment and tips.[90]

emotional dissonance Inconsistencies between the emotions people feel and the emotions they project.

The disparity between employees having to project one emotion *while feeling another* is called **emotional dissonance**. Bottled-up feelings of frustration, anger, and resentment can lead to emotional exhaustion. Long-term emotional dissonance is a predictor for job burnout, declines in job performance, lower job satisfaction, and even more nefarious effects like alcohol abuse and lashing out at coworkers.[91]

Myth or Science?

All Employees Experience Emotional Labor in the Same Way

All employees experience emotional labor in some way. However, there is substantial variation in the degree to which employees experience it and its consequences. Research reveals that, in general, the experience of emotional labor is more taxing for introverts compared with extroverts. Surface acting (hiding feelings and emotional expressions) is also more strongly related to emotional exhaustion and negative affect for introverts than extroverts. On the other hand, deep acting (trying to modify true feelings) was more strongly related to extroverts' negative affect. These findings demonstrate that deep acting's negative and positive emotional effects both impact extroverts.

There are also important implications for individuals and organizations. Extroverts likely perform well in sales positions not only because they are more sociable but also because of their capacity to cope with the emotional demands typical in service jobs. Even though some employees may be well equipped to handle emotional labor's demands, surface acting still tends to result in greater emotional exhaustion and reduced job satisfaction. Organizations cannot regulate their employees' emotions, but they can minimize the disconnection between expected and felt emotions. One strategy could be teaching employees to frame customer demands as challenges rather than threats.

Personality is not the only factor that influences how employees experience emotional labor. For instance, one study found that Black service providers who did not engage in emotional labor (e.g., deep acting) were perceived as less warm than White service providers. In this study, Black service providers had to exert more emotional effort to be viewed favorably by customers, which researchers attribute to racial stereotypes. Also, prior research has shown that supervisors rated Black employees lower on interpersonal warmth and job performance than White employees. Although Black employees might engage in additional emotional labor practices to match others' service performance, the inequity and additional effort are demanding and harmful to one's sense of self and well-being. More attention needs to be directed toward developing strategies that can reduce the barriers Black employees may face, particularly in the service industry.[92]

Emotionally intelligent employees (as discussed in a later section)[93] as well as those who have a high capacity for self-control, who sleep well every night, who have strong relationships with their customers or clients, and who are empowered to give help to others at work tend to be buffered to some degree from the negative side effects of emotional dissonance.[94] However, employees who fear isolation and strongly desire to please others (and belong to the group) are more likely to experience the negative effects of emotional dissonance.[95] In general, although there are individual differences that affect how employees manage emotional labor, research suggests that employees, leaders, and managers can be trained to regulate their emotional displays when appropriate.[96]

Affective events theory, discussed in the next section, fits a job's emotional labor requirements into a construct with implications for work events, emotional reactions, job satisfaction, and job performance.

Affective Events Theory

4-4 Describe affective events theory.

We have seen that emotions and moods are an important part of our personal and work lives. But how do they influence our job performance and satisfaction? **Affective events theory (AET)** proposes that employees react emotionally to things that happen to them at work, and these reactions influence their job performance and satisfaction.[97] For example, Lisamarie, a benefits administrator in North Carolina, began the in vitro fertilization (IVF) process after she was unable to conceive a child for six years and halfway through found out her employer was dropping the benefit—she was "gutted" and "lost," "cried for a week," and undoubtedly did not feel satisfied with her job following such a blow.[98]

affective events theory (AET) A model suggesting that workplace events cause emotional reactions on the part of employees, which then influence workplace attitudes and behaviors.

Work events trigger positive or negative emotional reactions, to which employees' personalities and moods predispose them to respond with greater or lesser intensity.[99] However, we experience some events more often than others, so does this have an effect on the types of affective reactions we experience at work? Some research supports the idea that it does, given that interpersonal mistreatment by customers of part-time workers accounted for nearly 50 percent of negative affective work events.[100]

Further, given the shift toward remote work in the modern era, researchers have turned their sights toward what affective events look like for remote workers. For remote workers, a positive affective event might be a quick and productive Zoom meeting with colleagues, whereas a negative affective event might be a terrible connection (and a conspicuous high-pitched screech that no one can diagnose) making it difficult to get anything done.[101]

In sum, AET offers two important messages.[102] First, emotions provide valuable insights into how workplace events influence employee performance and satisfaction. Second, employees and managers should not ignore emotions or the events that cause them, even when they appear minor, because they accumulate. EI is another framework that helps us understand the impact of emotions on job performance, so we will look at that topic next.

Emotional Intelligence

4-5 Describe emotional intelligence.

As the CEO of an international talent company, Terrie Upshur-Lupberger was at a career pinnacle. So why was she resentful and unhappy? A close friend observed, "Terrie, you were out on the skinny branch—you know, the one that breaks easily in a strong wind. You were so busy and overwhelmed and out of

touch with your own values, cares, and guiding beliefs that you failed to pay attention to the branch that was about to break."[103] According to Upshur-Lupberger, she had failed to notice that her moods constantly swung toward frustration and exhaustion. Her job satisfaction, productivity, and relationships suffered. Worse, she was too busy to realize the deficiencies until she was completely depleted. She said, "I learned that, as a leader, you either pay attention to and manage the moods (including your own) in the organization, or… you ignore them and pay the price."[104] Upshur-Lupberger learned the value of emotional intelligence (EI).

Employers value EI. In one CareerBuilder survey of more than 2,500 hiring managers and HR professionals, 59 percent said they would not hire someone with high cognitive ability (e.g., IQ; see the chapter on personality and individual differences) but low EI, and 75 percent said they would be more likely to promote a high EI candidate over one with high IQ.[105] In another study that tracked college students from graduation to more than ten years after entering the workforce, EI predicted how high their salary was ten years later as well as whether the alumni had a mentor.[106]

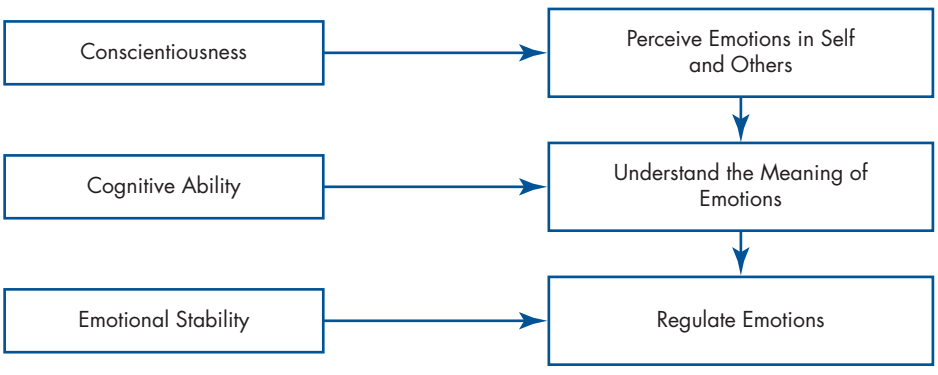
emotional intelligence (EI) The ability to detect and to manage emotional cues and information.

Emotional intelligence (EI) is a person's ability to (1) perceive emotions in oneself and others, (2) understand the meaning of these emotions, and (3) regulate one's own emotions accordingly, as shown in Exhibit 4-5.[107] When asked why they value EI over cognitive ability, the managers in the Career Builder study noted that they are more in tune with their emotions, so they can stay calm under pressure, resolve conflict more effectively, be empathetic with coworkers and team members, and effectively regulate their emotions.[108]

Several studies suggest that EI plays an important role in predicting job attitudes and facilitating academic and job performance, although the survey items are often strikingly similar to other items from personality, intelligence, and self-perception tests.[109] Other reviews suggest that EI is related to improving teamwork effectiveness, organizational citizenship behaviors (OCBs) (see introductory chapter), and career decision making (e.g., managing employment gaps) as well as reducing CWBs (see the chapter on job attitudes).[110] South Korean managers with high EI tend to have better sales figures than those with low EI because they were able to create more cohesive stores and improved sales-directed behavior.[111]

For a leadership perspective, one research study examined eleven U.S. presidents—from Franklin Roosevelt to Bill Clinton—and evaluated them on

Exhibit 4-5 A Cascading Model of Emotional Intelligence



Source: Based on D. L. Joseph and D. A. Newman, "Emotional Intelligence: An Integrative Meta-Analysis and Cascading Model," *Journal of Applied Psychology* 95, no. 1 (2010): 54–78.

six qualities: communication, organization, political skill, vision, cognitive style, and EI. The key quality that differentiated the successful (such as Roosevelt, Kennedy, and Reagan) from the unsuccessful (such as Johnson, Carter, and Nixon) was EI.[112] Furthermore, studies of popularity suggest that it is EI, not narcissism, that predicts long-term popularity.[113] As such, leaders and employees alike who are high on EI tend to be more popular and successful because they are able to understand and manage their own and others' emotions.[114]

However, it appears as if there are limits to the degree to which EI can be helpful in the workplace. For example, one study of Dutch administrative assistants suggests that EI that is focused on the self (e.g., self-understanding) decreases the experience of stress, but with physiological costs, while other-focused EI (e.g., accurately perceiving emotions in others) only weakly explained task performance.[115] This suggests that EI may be costly and not as effective as we think, especially in emotionally demanding contexts. Furthermore, some research suggests that EI might even be related to how well people can fake tests (because they understand what desirable answers are on tests).[116] According to this research, if you use a personality test to screen candidates for a job, those with high EI may be better at faking it.

An Ethical Choice

Should Managers Use Emotional Intelligence (EI) Tests?

As we discussed in this chapter, the concept of EI has raised some debate. One of the decisions for managers is whether to use EI tests in the selection process. Here are some ethical considerations:

- *There is no commonly accepted test.* For instance, researchers have recently used the Mayer–Salovey–Caruso Emotional Intelligence Test (MSCEIT), the Trait Emotional Intelligence Questionnaire, and the Situational Judgment Test of Emotional Intelligence (SJT of EI) in studies. Researchers feel EI tests may need to be culturally specific because emotional displays vary by culture; thus, the interpretation of emotional cues differs. For example, a recent study comparing the EI scores for Indian and North American executives using the Emotional Competence Inventory (ECI-2) test found the results similar but not the same, suggesting the need for modification.
- *Applicants may react negatively to taking an EI test in general or to parts of it.* The face recognition test, for example, may seem culturally biased to some if the subject photos are not diverse. Also, participants who score high on EI tests tend to consider them fair; applicants who score lower may not perceive the tests to be fair and can thus view the hiring organizations unfavorably—even if they score well on other assessments.
- *EI tests may not be predictive of performance for all types of jobs.* In a study of six hundred Romanian participants, results indicated that EI was valid for salespeople, public servants, and CEOs of public hospitals, but these were all roles requiring significant social interaction. EI tests may need to be tailored for each position category or not be used when the position description does not warrant such tests.
- *It remains somewhat unclear what EI tests are actually measuring.* They may reflect personality or intelligence, in which case other measures might be better. Also, some EI tests may predict job performance, but many of these tests include personality constructs and measures of general mental ability.
- *There is not enough research on how EI affects, for instance, CWB.* It may not be prudent to test and select applicants who are rated high on EI when we are not yet certain that everything about EI leads to desired workplace outcomes.

These concerns suggest that EI tests should be avoided in hiring decisions. However, because research has indicated that EI does predict job performance to some degree, managers should not be too hasty to dismiss them altogether. Rather, those wishing to use EI in hiring decisions should be aware of these issues to make informed and ethical decisions about not only whom to hire but how.[117]

Although the field is progressing in its understanding of EI, many questions have not been answered.[118] One relates to a better understanding of EI. For example, we need to be precise when we talk about EI—are we referring to EI in general? Or to regulating emotions, understanding emotions, or perceiving emotions specifically? A second question is about the reliability of EI testing and how best to measure EI. Several advancements have been made in this area, for example, by having test-takers recognize emotions from video clips and by having them respond with what they would do in emotionally charged situations.[119] A third question is one of the most important for managers in organizations: Can EI be learned? Several reviews of dozens of studies suggest that EI can be trained and developed as a skill—although, paradoxically, the people who need it the most are the ones least likely to actually seek it out![120]

All questions aside, EI is wildly popular among consulting firms and in the popular press, and it has accumulated some support in the research literature. Love it or hate it, one thing is for sure—EI is here to stay. So might be our next topic, emotion regulation, which is increasingly studied as an independent concept.[121]

Emotion Regulation

4-6 Identify strategies for emotion regulation.

emotion regulation The process of identifying and modifying felt emotions.

Have you ever tried to cheer yourself up when you were feeling down or calm yourself when you were feeling angry? If so, you have engaged in **emotion regulation**.[122] The central idea behind emotion regulation is to identify and modify the emotions you feel. For instance, workers worldwide have had to regulate emotions in the face of the COVID-19 pandemic, with many facing an uncertain labor market as well as changing family responsibilities and work–family conflict.[123] Emotion regulation is a strong predictor of task performance for some jobs and for OCB.[124] Therefore, in our study of OB, we are interested in *when* and *how* emotion regulation is used in the workplace. We begin by identifying which individuals might naturally employ it.

Emotion Regulation Influences and Outcomes

As you might suspect, not everyone is equally good at regulating emotions.[125] Individuals who are higher in the personality trait of neuroticism (see the chapter on personality and individual differences) have more trouble doing so and often find that their moods are beyond their ability to control. Individuals who have lower levels of self-esteem are also less likely to try to improve their sad moods, perhaps because they are less likely than others to feel they deserve to be in a good mood.[126] Finally, university seniors who are more focused on mastering the job search process were better able to regulate their emotions and engaged in more job search behaviors as a result.[127]

The workplace environment influences an individual's tendency to employ emotion regulation. In general, diversity in work groups increases the likelihood that you will regulate your emotions. For example, younger employees are likely to regulate their emotions when their work groups include older members.[128] Racial diversity also has an effect: If diversity is low, the underrepresented employee will engage in emotion regulation, perhaps to "fit in" with the other employees as much as possible.[129] These findings suggest a beneficial outcome of diversity—it may cause us to regulate our emotions more consciously and effectively.

While regulating your emotions might seem beneficial, research suggests there may be a downside to trying to change the way you feel. Changing your emotions takes effort and, as we noted when discussing emotional labor, this effort can be exhausting. Sometimes attempts to change an emotion actually make the emotion stronger; for example, trying to talk yourself out of being afraid can make you focus more on what scares you, which makes you more

afraid.[130] From another perspective, research suggests that avoiding negative emotional experiences is less likely to lead to positive moods than does seeking out positive emotional experiences.[131] For example, you are more likely to experience a positive mood if you have a pleasant conversation with a friend than if you avoid an unpleasant conversation with a hostile coworker.

Interestingly, some positions involve more customer incivility and mistreatment directed toward employees than others—positions with higher levels of customer mistreatment (e.g., call center employees) necessitate more employee emotion regulation and, as a result, can lead to higher levels of employee exhaustion.[132] Do you want to make a customer service employee's life easier? Be nice to them! One study of supermarket checkout operators found that smiling at checkout staff and engaging in short conversations reduces the staff members' emotion regulation needs and as such reduces their emotional exhaustion and improves their performance.[133]

Emotion Regulation Techniques

Researchers of emotion regulation often study the strategies people employ to change their emotions (for example, as we discussed earlier in the chapter, *deep acting* and *surface acting* are emotion regulation techniques).

One technique of emotion regulation is *emotional suppression*, or suppressing initial emotional responses to situations. This response seems to facilitate practical thinking in the short term but is generally ineffective when compared with expressing ones' emotions.[134] However, it appears to be helpful only when a strongly negative event would illicit a distressed emotional reaction during a crisis.[135] For example, a portfolio manager might suppress an emotional reaction to a sudden drop in the value of a stock and can therefore clearly decide how to plan. Suppression used in crisis situations appears to help an individual recover from the event emotionally, while suppression used as an everyday emotion regulation technique can take a toll on mental ability, emotional ability, health, and relationships.[136] Thus, unless we are truly in a crisis, acknowledging rather than suppressing our emotional responses to situations and reevaluating events after they occur yield the best outcomes.[137]

Cognitive reappraisal, or reframing our outlook on an emotional situation, is one way to regulate emotions effectively.[138] Cognitive reappraisal ability seems to be the most helpful to individuals in situations where they cannot control the sources of stress.[139] For example, if you lost your job, reframing it as an opportunity to try the new career you always dreamed about may help you regulate your emotions. One study illustrates the potentially powerful effect of this technique. Israeli participants who were shown anger-inducing information about the Israeli–Palestinian conflict after they were primed to reappraise the situation showed more inclination toward conciliation and less inclination toward aggressive tactics against Palestinians than the control group, not only immediately after the study but up to five months later. This result suggests that cognitive reappraisal may allow people to change their emotional responses, even when the subject matter is as highly emotionally charged as the Israeli–Palestinian conflict.[140] However, cognitive reappraisal can be used for unethical aims—for instance, reappraising the shame and guilt one would anticipate for performing CWBs may lead people to reconsider and actually commit to engaging in unethical CWBs.[141] Yet another study found that cognitive reappraisal can actually *lead to* mental fatigue, suggesting that not all of the outcomes of cognitive reappraisal are positive.[142]

Another technique with potential for emotion regulation is *social sharing*, or venting. Research shows that the open expression of emotions can help individuals to regulate their emotions as opposed to keeping emotions "bottled up." Social sharing can reduce anger reactions when people can talk about the facts of a bad situation, their feelings about the situation, or any positive aspects of the situation.[143] For example, venting to your coworker after work about the

heated interchange with your manager in the kitchen may help you express your feelings and understand the situation a little better. Caution must be exercised, though, because expressing your frustration affects other people. In fact, whether venting emotions helps the "venter" feel better depends very much upon the listener's response. If the listener does not respond (many refuse to respond to venting), the venter feels worse. If the listener responds with expressions of support or validation, the venter feels better. Therefore, if we are going to vent to a coworker, we need to choose someone who will respond sympathetically. Venting to the perceived offender rarely improves things and can result in heightening the negative emotions.[144]

While emotion regulation techniques can help us cope with difficult workplace situations, research indicates that the effect varies. For example, one study of employees working for abusive supervisors reported emotional exhaustion and work-withdrawal tendencies but to different degrees based on the emotion regulation strategies they employed. Employees who used suppression techniques suffered greater emotional exhaustion and work withdrawal than employees who used cognitive reappraisal. This suggests that more research on the application of techniques needs to be done to help employees increase their coping skills.[145]

Ethics of Emotion Regulation

Emotion regulation has important ethical implications. On one end of the continuum, some people might argue or perceive that controlling your emotions is unethical because it requires a degree of acting.[146] On the other end, people might argue that all emotions should be controlled so you can take a dispassionate perspective. Both arguments—and all arguments in between—have ethical pros and cons that you will have to decide for yourself. Consider the reasons for emotion regulation and the outcomes. Are you regulating your emotions so you do not react inappropriately, or are you regulating your emotions so no one knows what you are thinking? Consider this: You may be able to "fake it'til you make it." Recent research has found that acting like you are in a good mood might *put* you in a good mood. In one study, a group of participants was asked to hold only an efficient conversation with a barista serving them at Starbucks, while another group was asked to act happy. The happy actors reported later that they were in much better moods.[147]

The key is to be adaptive: Try to be aware of your emotions and use the regulation techniques best suited for the situation.[148] Now that we have studied the role of emotions and moods in OB, let's consider the opportunities for more specific applications that our understanding provides.

OB Applications of Emotions and Moods

4-7 Apply concepts about emotions and moods to specific OB issues.

Our understanding of emotions and moods can affect many aspects of OB, including the selection process, decision making, creativity, motivation, leadership, negotiation, customer service, job attitudes, deviant workplace behavior, and safety. Let's think through each of these.

The Selection Process

One implication from the evidence on EI is that employers should consider it a factor in hiring employees, especially for jobs that demand a high degree of social interaction. In fact, more employers *are* starting to use EI measures to hire people. For example, a study of U.S. Air Force recruiters showed that top-performing recruiters exhibited high levels of EI. Using these findings, the Air Force revamped its selection criteria. A follow-up investigation found hires who had high EI scores were 2.6 times more

successful than those who did not.[149] A second implication is that applicant emotions are sometimes, knowingly or not, used in selection decisions. As we mentioned earlier, research demonstrates that the emotional displays of applicants are often used in hiring decisions.[150] Selecting positive team members can contribute toward a positive work environment because positive moods from these leaders can transmit from team member to team member. One study of 130 leaders and their followers found that leaders who are charismatic transfer their positive emotions to their followers through a contagion effect.[151] It makes sense, then, to choose team members predisposed to positive moods. Finally, the affect of job seekers matters as well—when on the hunt for a new job, one is often assailed with setbacks, distressing affective events, and threats to one's competence. In these cases, it is best to have compassion toward yourself, as research shows that this can buffer the negative emotions experienced during job search.[152]

Decision Making

Moods and emotions have effects on decision making that employees and managers should understand. Positive emotions and moods seem to help people make sound decisions. Positive emotions also enhance problem-solving skills, so positive people find better solutions.[153]

OB researchers continue to debate the role of negative emotions and moods in decision making. One study suggested that people who are saddened by events may make the same decisions as before, while people who are angered by events might make stronger (though not necessarily better) choices than before.[154] Another study found that participants made choices reflecting more originality in a negative mood.[155] Still other research indicated that individuals in a negative mood may take higher risks than they do when in a positive mood.[156] Taken together, these and other studies suggest negative (and positive) emotions affect decision making but that there are other variables that require further research.[157]

Creativity

As we see throughout this text, one strategic goal is to maximize employee productivity through creativity. Creativity is influenced by emotions and moods, but there are two schools of thought on the relationship. Much research suggests that people in good moods tend to be more creative than people in bad moods.[158] People in good moods produce more ideas and more options, and others think their ideas are original.[159] It seems that people experiencing positive moods or emotions are more flexible and open in their thinking, which may explain why they are more creative.[160] Supervisors should actively try to keep employees happy because doing so creates more good moods (employees like their leaders to encourage them and provide positive feedback on a job well done), which in turn leads people to be more creative.[161]

Some researchers, however, do not believe a positive mood makes people more creative. They argue that, when people are in positive moods, they may relax ("If I am in a good mood, things must be going okay, and I don't need to think of new ideas") and not engage in the critical thinking necessary for some forms of creativity.[162] Individuals who worry more may perform better on creative tasks than those who worry less.

Determining which perspective is correct may lie in thinking of moods somewhat differently. Rather than looking at positive or negative affect, it is possible to conceptualize moods as active feelings like anger, fear, or elation and contrast these with deactivating moods like sorrow, depression, or serenity. All the activating moods, whether positive *or* negative, seem to lead to more creativity, whereas deactivating moods lead to less.[163] A study of 428 students found they performed best on a creative problem-solving task when they were fatigued, suggesting that tiredness may free the mind to consider novel solutions.[164]



Ursula Burns, former CEO of Xerox, and the first woman to lead a Fortune 500 company, speaks at the Annual John Wooden Global Leadership Award Dinner. Burns' ability to engage with individuals and be "listener-in-chief" contributed to Xerox's massive growth during her tenure as CEO.
Source: Matt Sayles/Invision/AP/Shutterstock.

Motivation

Several studies have highlighted the importance of moods and emotions on motivation.[165] For instance, one study asked two groups of people to solve word puzzles. The first group saw a funny video clip intended to put them in a good mood first. The other group was not shown the clip and started working on the puzzles right away. The positive-mood group reported higher expectations of being able to solve the puzzles, worked harder at them, and did solve more as a result.[166] Another study looked at the moods of insurance sales agents.[167] Agents in a good mood were found to be more helpful toward their coworkers and felt better about themselves. These factors in turn led to superior performance in the form of higher sales and better supervisor reports of performance.

Giving people performance feedback—whether real or fake—influences their mood, which then influences their motivation.[168] A spiral can be created in which positive moods cause people to be more creative, leading to positive feedback from those observing their work.[169] The feedback further reinforces the positive mood, which makes people perform even better, and so on. Overall, the findings suggest a manager may enhance employee motivation—and performance—by encouraging good moods.

Leadership

Putting people in a good mood makes good sense. Leaders who focus on inspirational goals generate greater optimism, cooperation, and enthusiasm in employees, leading to more positive social interactions with coworkers and customers.[170] A study with Taiwanese military participants indicates that, by sharing emotions, transformational leaders inspire positive emotions in their followers that in turn lead to higher task performance.[171]

Leaders are perceived as more effective when they share positive emotions, and followers are more creative in a positive emotional environment. What about when leaders are sad? Research found that leader displays of sadness increased the analytic performance of followers, perhaps because followers attended more

closely to tasks to help the leaders.[172] Another interesting study examined more than three hundred halftime locker room speeches from high school and college basketball teams, finding that leaders' sharing of negative emotions (e.g., anger) can help *improve* team performance. However, these emotions had to be at the right level of intensity—too negative and intense, and the display would backfire.[173] Leader anger, on the other hand, sparks both anxiety and anger in employees, paradoxically leading to higher work effort, but also to unethical retaliatory behavior, employees speaking up less, or employees leaving the organization.[174]

Corporate executives know emotional content is critical for employees to buy into their vision of the company's future and accept change.[175] When higher-ups offer new visions, especially with vague or distant goals, it is often difficult for employees to accept the changes they will bring. By arousing emotions and linking them to an appealing vision, leaders may help managers and employees alike to accept change and feel connected to the new plan.

Negotiation

Several studies suggest that emotions play a role in negotiation,[176] but especially anger. In some situations, anger can benefit the negotiator as the opponent may conclude that the negotiator has conceded everything they can and so gives in.[177] In other cases, the opponent may try to diagnose why the negotiator is angry, leading to better joint concessions for both parties.[178] However, anger should be used selectively in negotiation: Angry negotiators who have less information or less power than their opponents have significantly worse outcomes,[179] such as angry negotiators who refuse to take the opponent's perspective (which could be useful information).[180] As in the use of any emotion, context matters. Displaying a negative emotion (such as anger) can be effective, but feeling angry, regretful, or prideful about your performance appears to impair future negotiations.[181] Individuals who do poorly in negotiation experience negative emotions, develop negative perceptions of their counterparts, and are less willing to share information or be cooperative in future negotiations.[182]

Customer Service

Workers' emotional states influence the level of customer service they give, which in turn influences levels of repeat business and customer satisfaction.[183] This result is primarily due to **emotional contagion**—the "catching" of emotions from others.[184] When someone experiences positive emotions and laughs and smiles at you, like when they are sending you a funny meme about retail life, you tend to respond positively. Of course, the opposite is true as well.

emotional contagion The process by which peoples' emotions are caused by the emotions of others.

Studies indicate a matching effect between employee and customer emotions.[185] In the employee-to-customer direction, research finds that customers who catch the positive moods or emotions of employees (if they believe they are appropriate and authentic) become more satisfied and loyal to the organization, trust the organization to a greater degree, and even shop longer.[186] In the other direction, when an employee feels unfairly treated by a customer, it is harder for them to display the positive emotions the organization expects.[187] High-quality customer service makes demands on employees because it often puts them in a state of emotional dissonance, which can be damaging to the employee and the organization. Managers can interrupt negative contagion by fostering positive moods.

Work–Life Conflict

There is good news and bad news about the relationship between moods and work–life conflict: Both are affected by work and home events. Ever hear the advice "Never take your work home with you," meaning you should forget about work once you go home? That is easier said than done, especially now that so many

Toward a Better World

Scream Agency: Harnessing Customer Emotions to Bolster CSR

Some might believe that corporate social responsibility (CSR) "speaks for itself," that it is "all about action," and that the authentic practice of CSR involves modestly doing what is right without concern for the public's response. Furthermore, some might believe that the default reaction from customers who *do* become aware of an organization's CSR actions is "eye-rolling" and automatic dismissal of the effort as inauthentic. Adopting both mindsets would be a huge missed opportunity. First, not committing to telling the story of your company's efforts is a missed opportunity to reach customers and convince them of the importance of the organization's CSR mission. Second, when done well, CSR messaging can effectively connect with current and potential customers, foster loyalty, and even convince customers of the importance of the organizations' CSR efforts. In other words, CSR messaging goes well beyond driving profits and can be a force for the greater good.

Meet Scream Agency, an advertising and public relations (PR) firm headquartered in Denver, Colorado. Its founder, Laura Ledermann, graduated from the University of Colorado Boulder with a CSR certificate. After graduating, Ledermann started Scream Agency to develop messaging and tell organizations' stories in a way "that's heard." Like Ben & Jerry's (spotlighted in the introductory chapter's "Toward a Better World"), Scream is a B-corporation and is committed to meeting rigorous social and environmental performance as an integral part of its business model. Scream Agency has worked with many companies to tell the story of their CSR efforts, including Hyatt Hotels, the American Automobile Association (AAA), and the Mellow Mushroom pizzeria chain. In Scream Agency's manifesto, the company aspires to inspire brands to *be a change for good.* Their three-pronged mission is to be seen, be heard, and be good (with a heavy emphasis on the "good"). As a part of its strategy, Scream harnesses the power of emotions and EI to better connect with customers and employees. Scream's approach involves four primary purposes: (1) identifying and becoming aware of the social problems to be solved, (2) preparing messaging to inform stakeholders, (3) convincing them of the solution, and (4) connecting with the audience's emotions.

Although Scream's approach makes sense in theory, is it evidence-based? First, research on Australian corporations active in climate change efforts suggests that marketing and CSR professionals play a crucial role. They contribute to the conversation and shape public opinion on the issue, making the difference between framing it as a challenge or an opportunity to make a difference. Second, messaging matters internally. For instance, Hurricane Katrina survivors experienced reduced job strain as a result of their organization's response to the disaster as well as their compassionate messaging. Other studies have shown that CSR can lead employees to feel proud to work where they work and, as a result, less likely to leave for other organizations. Lastly, what about customers? Research demonstrates that the nature of CSR messaging has a direct emotional impact on customers. For instance, a study of more than one thousand banking customers in Spain found that CSR communication led them to feel more positive emotions (e.g., happiness, pleasure, and delight) and want to identify more with their bank.

But there are challenges to this approach, as emotions do not always operate in the way we expect. For instance, managers' and executives' (lack of) emotions matter, too. CSR professionals often try to convince managers and executives of CSR's business case. Although many may agree with the case, they are no less likely to do anything about it than managers who disagree. The business case and "rational justification" actually undermine moral emotions. Thus, executives are less likely to be moved or become angry at the CSR problem and are less likely to act. Also, we should understand that emotions are not an all-or-nothing proposition. Customers experience both positive and negative emotions. Positive emotions do not always lead to good outcomes. What one employee/customer/manager experiences may not be valid for the others. For instance, not everyone may agree with the organizations' interpretation of the CSR problem and response, or some may question the organization's credibility in dealing with the issue. Managing emotions in CSR messaging appears to be a challenge. However, professionals can take an adaptive approach to manage employee, manager, and customer emotions to realize the organization's CSR mission.[188]

people are working from home. The good news is that a positive mood at work can apparently spill over to your off-work hours, and a negative mood at work can be restored to a positive mood after a break. Several studies have shown that people who had a good day at work tend to be in a better mood at home that evening, and vice versa.[189] Other research has found that, although people do emotionally take their work home with them, by the next day the effect is usually gone.[190] The bad news is that the moods of your household may interfere with yours. As you might expect, one study found that if one member of a couple was in a negative mood during the workday, the negative mood spilled over to the spouse at night.[191]

Unethical Workplace Behaviors

Anyone who has spent much time in an organization realizes people can behave in ways that violate established norms and threaten the organization, its members, or both. As we saw in the introductory chapter, these unethical behaviors (also referred to as deviant behaviors) can do a great deal of harm in organizations and often take the form of counterproductive work behaviors (CWBs).[192] They can be traced to negative emotions and can take many forms. People who feel negative emotions are more likely than others to engage in short-term deviant behavior at work, such as gossiping or excessively surfing the Internet instead of working,[193] although negative emotions can also lead to more serious forms of CWB.

For instance, envy is an emotion that occurs when you resent someone for having something you do not have but strongly desire—such as a better work assignment, larger office, or higher salary. It can lead to malicious deviant behaviors. An envious employee could undermine other employees and take all the credit for things others accomplished. Angry people look for other people to blame for their bad mood, interpret other people's behavior as hostile, and have trouble considering others' points of view.[194] It is also not hard to see how these thought processes can lead directly to verbal or physical aggression.

One study found that anger correlated with more aggressive CWBs such as abuse against others and production deviance, while sadness did not. Neither anger nor sadness predicted workplace withdrawal, which suggests that managers need to take employee expressions of anger seriously; employees may stay with an organization and continue to act aggressively toward others.[195] CWBs can also lead to a negative emotional spiral, with some employees experiencing negative emotions *after* they engage in CWBs as well.[196] These negative emotions can be exacerbated due to social media, as one study demonstrated that following a catastrophic event at an organization, negative emotions resonated through Facebook like an echo chamber.[197] Once aggression starts, it is likely that other people will become angry and aggressive, so the stage is set for a serious escalation of negative behavior. Therefore, managers need to stay connected with their employees to gauge emotions and emotional intensity levels. But be careful–although many companies have started keeping close track of employees' emotions and moods through surveys, and even by analyzing their daily email and chat data, many employees find this to be an invasion of privacy.[198]

Safety and Injury at Work

Bad moods can contribute to injury at work in several ways.[199] Individuals in negative moods tend to be more anxious, which can make them less able to cope effectively with hazards. A person who is always fearful will be more pessimistic about the effectiveness of safety precautions because they feel they will just get hurt anyway, or might panic or freeze up when confronted with a threatening situation. Negative moods also make people more distractible, and distractions can obviously lead to careless behaviors. For instance, two studies of migrant workers and expatriate military personnel found that negative, longing feelings of

homesickness predicted both job performance and safety behaviors.[200] Research relating negative affectivity to increased injuries at work suggests employers might improve health and safety (and reduce costs) by ensuring that workers are not engaged in potentially dangerous activities when they are in a bad mood.

Summary

Emotions and moods are both a part of the affective experience at work. But they are also different—moods are more general and longer-lived, where emotions are discrete and short-lived. Together, these feelings and experiences comprise workers' positive and negative affect, essential concepts to describe the emotional nature of work. Discrete emotions serve various functions, and OB researchers categorize them differently. For instance, some emotions are ethically charged in response to moral situations. Others serve more basic functions in response to everyday events. The time of day, stressful events, and sleep patterns are some of the factors that influence emotions and moods. Varieties in the experience of emotions and mood highlight that sometimes employers establish norms for desired or appropriate emotions on the job. The disconnect between one's felt emotions and displayed emotions and the effort workers expend to maintain them can have several implications for employee well-being and productivity. Affectively charged work events often trigger these emotions. Affective events theory suggests that these events lead to emotional reactions, which impact job satisfaction and job performance. What can better equip workers and managers to deal with these unpredictable work experiences? Research on EI and emotion regulation suggests the competencies people can draw upon to manage their (and others') emotions and moods at work. Indeed, affect, emotions, and moods at work have substantial implications for several aspects of OB. The "Affective Revolution" is still running strong to this day.

Implications for Managers

- Recognize that emotions, mood, and affect are a natural part of the workplace, and good management does not mean creating an emotion-free environment.
- Emotional experience is volatile and unpredictable. Just as we often have trouble predicting what happens in work life, so, too, do we have trouble predicting our emotional responses to what happens. But we *can* attempt to regulate how we react to the events and respond to others' emotions.
- As a manager, consider how employees may react when announcing a new policy or taking action that affects them. You may be the catalyst for an affective event that has emotional consequences. Because of this, you should try to anticipate how you could effectively respond to their reactions.
- Surface acting and emotional suppression are generally ineffective strategies for managing ones' emotions. Deep acting, natural emotional expression, and cognitive reappraisal may be more effective strategies.
- Work to develop an understanding of the role of emotions and moods to significantly improve your ability to explain and regulate your own and others' behavior.
- To foster effective decision making, creativity, and motivation, model positive emotions and moods as much as is authentically possible.
- In the service sector, encourage authentic, appropriate positive displays of emotion, which are "contagious" to customers and improve service interactions and negotiations.

Sometimes Yelling Is for Everyone's Good

POINT

Anger is discussed throughout this chapter for a reason: It is an important emotion. There are benefits to expressing anger. For one, research indicates that only employees who are committed to their organizations tend to express their anger, and generally only to leaders who created the situation. This type of expression of anger could lead to positive organizational change. Second, suppressed anger can lower job satisfaction and lead to a feeling of hopelessness about things improving.

Even with these findings, we hear a lot about not responding emotionally to work challenges. Work cultures teach us to avoid showing any anger at all lest we be seen as poor workers or, worse, unprofessional or even deviant or violent. While, of course, there are times when the expression of anger is harmful or unprofessional. We have taken this view so far that we now teach people to suppress perfectly normal emotions and to ignore the effectiveness of some emotional expression.

Emerging research shows that suppressing anger takes a terrible internal toll on individuals. One Stanford University study found, for example, that when individuals were asked to wear a poker face during the showing of a movie clip depicting the atomic bombings of Japan during World War II, they were much more stressed in conversations after the video. Other research shows that college students who suppress emotions like anger have more trouble making friends and are more likely to be depressed, and that employees who suppress anger feel more stressed by work.

For the good of organizations and their employees, we should encourage people not to hold back their emotions but to share them constructively.

COUNTERPOINT

Yes, anger is a common emotion. But it is also a toxic one for the giver and the receiver. Angry outbursts can compromise the heart and contribute to diabetes, among other ill effects. The experience of another's anger and its close correlate, hostility, is also linked to many counterproductive behaviors in organizations. The Bureau of Labor Statistics estimates that 15 percent of fatal workplace injuries result from workplace violence. That is why many organizations are implementing conflict management training programs.

To prevent violence and counterproductive behavior, many companies develop policies that prohibit conduct such as yelling, shouting profanities, and making hostile gestures. Others institute conflict management training programs. These programs come in a variety of forms and cover a wide range of topics. They often involve one-day workshops, small-group facilitations, or one-on-one sessions. The benefit of these programs is that they can help employees who become explosively angry and those who exhibit passive-aggressive behavior that is also harmful to an organization. In addition to these programs, developing strong employee relations can help prevent these types of behaviors from occurring in the first place. Careful hiring that considers a candidate's demeanor and communication style in addition to their experience is also key.

In the end, everyone wins when organizations seek to diminish both the experience and the expression of anger at work. The work environment becomes less threatening and stressful to employees and customers. Employees are likely to feel safer, and the angry employee is often helped as well.[201]

CHAPTER REVIEW

QUESTIONS FOR REVIEW

4-1 How are emotions different from moods?

4-2 What are the sources of emotions and moods?

4-3 What impact does emotional labor have on employees?

4-4 What is affective events theory?

4-5 What is emotional intelligence?

4-6 What are some strategies for emotion regulation?

4-7 How do you apply concepts about emotions and moods to specific OB issues?

APPLICATION AND EMPLOYABILITY

An understanding or even awareness of others' emotions and moods can help improve your effectiveness in the workplace. As we have seen, employees react to events as they happen in the workplace, and these affective reactions can have a large impact on outcomes that are important to organizations. Employees may need to regulate their emotions (especially in positions that require interacting with clients), and this regulation may have an impact on employee performance and well-being. Employees may vary on EI, a skill, ability, or set of competencies that is related to many outcomes in the workplace. In this chapter, you have improved many skills, including your communication and collaboration skills, by discovering how not all employees experience emotional labor in the same way, learning how to build off customer emotions to amplify CSR, and discussing the benefits and pitfalls of yelling in the workplace. In the following section, you will have more opportunities to develop your critical thinking and knowledge application skills by learning mindfulness techniques for emotion regulation and stress reduction, considering the ethics of data mining, microexpressions of emotion, and considering whether to adapt one's own emotions as a result of performance appraisal feedback.

EXPERIENTIAL EXERCISE Mindfulness at Work

The concept of mindfulness emphasizes trying to focus your mind in the present moment, immersing yourself in what is going on around you. (Mindfulness will be discussed in depth in the final chapter on organizational health and stress.) Core principles include suspending immediate judgment of the environment and your thoughts and keeping yourself open to what is around you. The benefits of mindfulness can reach beyond reducing stress, including increased creativity, longer spans of attention, reductions in procrastination, and improved performance.

The Procedure

Start this exercise individually and then come together into groups of three or four individuals to discuss what you have found. Although complete workplace mindfulness interventions can take several weeks, some basic starting exercises can be done in a relatively short period and give you a feeling for what an entire course of mindfulness would be like. Here are three simple exercises to try. For all these, everyone needs to put everything away (especially phones, tablets, and computers!) and focus on what is going on in the immediate environment.

- *Mindful breathing:* Clear your mind of everything except thoughts of your breath. Concentrate on how you are inhaling and exhaling. It is sometimes helpful to count how long each breath takes. Try to maintain this mindful breathing for three minutes. The group will then take three minutes to discuss how this made them feel.
- *Mindful listening:* Now clear your mind of everything except what is going on in the immediate environment. Try to hear as many sounds around you as possible without judging or evaluating them. Try to maintain this mindful listening for three minutes. The group will then take three minutes to discuss some of the details they noticed.
- *Mindful thinking:* As with listening, clear your mind of everything, but now focus just on your ideas about mindfulness and stress. Do not talk about or write down what you are thinking (yet); focus your full quiet attention on this exercise and what it means. Try to maintain this mindful thinking for three minutes. The group will then take three minutes to talk about this experience.

As noted earlier, these are brief examples of mindfulness exercises. In a complete mindfulness program, you would go through several sessions of up to an hour each. Now that you have an idea of what it feels like to do mindfulness work, consider the following questions in your groups:

4-8. Were there any aspects of the mindfulness practice sessions you found especially pleasant or helpful? Were there any aspects of the sessions that you found unpleasant or uncomfortable?

4-9. What concerns might you have about implementing a mindfulness intervention in the workplace? What are some of the obstacles you might face in trying to have employees engage in a mindfulness stress reduction program?

4-10. Bring the class together and discuss your responses.[202]

ETHICAL DILEMMA Data Mining Emotions

Did anyone ever tell you that you wear your heart on your sleeve? It is a popular expression, but obviously, no one is looking at your sleeve to read your emotions. Instead, we tend to study a person's facial expressions to "read" their emotions. Most of us think we are rather good at reading faces, but we could not say precisely how we make our interpretations, and we do not know whether they are accurate. But what if we could use technology to know how another person is feeling? Would it be ethical to do so in the workplace and then act on our findings?

Technology is not quite ready to do this. Face reading is a complex science. Paul Ekman, a noted psychologist, has

catapulted the field toward making this dream possible. Ekman studied the interpretation of emotions for more than forty years and developed a catalog of more than five thousand muscle movements and emotional content. Ekman's work even spawned a television series called *Lie to Me*. The main characters analyzed microexpressions—expressions that occur in a fraction of a second—to assist in corporate and governmental investigations. Using Ekman's Facial Coding System, technology firms like Emotient Inc. have been developing algorithms to match microexpressions to emotions. These organizations are currently looking for patterns of microexpressions that might predict behavior.

Honda, Procter & Gamble (P&G), Coca-Cola, and Unilever have tried the technology to identify the reactions to new products, with mixed results. For one thing, expressions can change instantly, so it is challenging to discern which emotions prevail. A person watching a commercial, for instance, may smile, furrow their brow, and raise their eyebrows all in the space of 30 seconds, indicating expressiveness, confusion, and surprise in turn. Second, it is difficult to know whether a person will act on these fleeting emotions. Third, the technology might misinterpret the underlying emotions or their causes.

This technology's potential applications to the workplace include surveillance, gauging reactions to organization announcements, and lie detection. Cameras could be in every meeting room, hallway, and even on employees' computer screens. Emotion monitoring could be an announced event—say, every Monday from 8 to 9 a.m.—or random. Monitoring could be conducted with or without the knowledge of employees; for instance, data on every employee's emotional reactions in an organizational announcement meeting could be read and interpreted through a camera on the wall.

So far, the most reliable workplace application seems to be using the technology to capture inconsistencies (lying). Even the pioneer of facial emotion recognition, Ekman, said, "I can't control usage [of the technology]. I can only be certain that what I'm providing is at least an accurate depiction of when someone is concealing emotion."

There is an ethical consideration and a responsibility for each usage, particularly if a manager is going to act on the findings or infer the employee's future behavior. The fact that the technology has not yet fully evolved for workplace application allows time for ethical guidelines to be developed. Foremost among the ethical concerns is privacy. "I can see few things more invasive than trying to record someone's emotions in a database," said privacy advocate Ginger McCall. Concerns about ethical usage are also critical if managers use the technology to make decisions about employees—for example, if a manager learns from the software that an employee is unhappy and decides to look for a work reassignment for the employee when the employee is actually unhappy about their spouse. Former U.S. counterterrorism detective Charles Lieberman advises, "Recognize [the technology's] limitations—it can lead you in the right direction but is not definitive."

Questions

4-11. What do you think are the best workplace applications for emotion reading technology?

4-12. What are the ethical implications of reading faces for emotional content in the workplace?

4-13. Assuming you could become better at detecting the real emotions of others from facial expressions, do you think it would help your career? Why or why not?[203]

CASE INCIDENT Performance Review Shock: Being Told How to Feel and Act

You have your annual review meeting with your supervisor today. Given that you met all your sales goals this year, you were hopeful that this would mean a promotion. During the meeting, your supervisor praises your work ethic and recognizes that you have been a valuable asset to the company despite only a two-year tenure. However, your supervisor ends the meeting with one significant critique to your dismay: You do not seem happy enough and should smile more. Your supervisor continues, explaining that many of the senior executives at the company perceive you as unfriendly. "You just need to work on your EI, that's all," your supervisor says. You are so taken aback by this comment that all you can say is, "Okay… I will work on that."

It had not even occurred to you that your demeanor would be scrutinized or even considered to be part of your job performance. In fact, as one of the youngest employees at the company, you had to put a lot of effort into being taken seriously. As a result, you always tried to act professionally, but now it seems like that may have backfired. The more you think about it, the more frustrated you become. If you meet or exceed the sales metrics, what should it matter whether you smile? Besides, what is EI anyway? Everyone talks about it in magazines and newspapers. Still, no one can seem to give a straight answer as to what it means. However, if your "unfriendly" demeanor is the only thing standing between you and a promotion, perhaps you should try to smile more and be friendlier when the senior executives are around. But then that might mean people could take advantage of you, and you are not sure you can try to be something you are not. It just feels so inauthentic and fake.

Questions

4-14. Do you agree that your demeanor at work is important? Do you think its importance varies across situations, contexts, and jobs? Explain.

4-15. What role, if any, do you think EI plays in this situation?

4-16. Could the supervisor have done anything differently to help you understand the feedback and assist you in using it constructively?

4-17. What would you do in this situation, and why?[204]

5 Personality and Individual Differences



Source: Jeff Chiu/AP/Shutterstock

LEARNING OBJECTIVES

After studying this chapter, you should be able to:

5-1 Describe the differences between person–job fit and person–organization fit.

5-2 Describe personality, the way it is measured, and the factors that shape it.

5-3 Describe the strengths and weaknesses of the Myers-Briggs Type Indicator (MBTI) personality framework, the Big Five Model, and the Dark Triad.

5-4 Discuss how the concepts of core self-evaluation (CSE), self-monitoring, and proactive personality contribute to the understanding of personality.

5-5 Describe how the situation affects whether personality predicts behavior.

5-6 Demonstrate the relevance of intellectual and physical abilities to OB.

5-7 Contrast terminal and instrumental values.

Employability Skills Matrix (ESM)

	Myth or Science?	An Ethical Choice	Point/ Counterpoint	Toward a Better World	Experiential Exercise	Ethical Dilemma	Case Incident
Critical Thinking & Creativity	✓	✓	✓	✓	✓	✓	✓
Communication	✓	✓		✓	✓	✓	✓
Collaboration			✓	✓			✓
Self-Management	✓				✓	✓	
Social Responsibility		✓		✓	✓	✓	
Leadership		✓		✓	✓		✓
Career Management			✓		✓	✓	

THE RISE AND FALL OF THERANOS

Many of the best leaders can communicate their vision and inspire people to pursue a common goal. Some of the traits that best predict these behaviors may be essential for effective leadership, such as a charismatic personality. However, traits often associated with influential leadership, including confidence, charisma, and willingness to take risks, are also strongly related to narcissism. Specifically, grandiose narcissists tend to be confident, extroverted, and self-promoting, often helping them assume authority positions in organizations. In extreme cases, narcissism can lead to abuse, exploitation, and ethical misconduct. The question is: How can we tell the difference between a leader who is authentically inspiring people to pursue a common goal and a narcissistic leader with a hidden agenda? The answer is that it can be difficult.

The rise and fall of Theranos provides an excellent example of the interplay between narcissistic personality traits and leadership. Elizabeth Holmes, CEO of the now-defunct company, was once heralded as the next Steve Jobs. At nineteen, she dropped out of Stanford with an ambitious vision to start Theranos, a consumer health care technology startup. At one point, the company was valued at $9 billion. Holmes achieved this success by convincing many powerful and influential people that her company would revolutionize the health care industry. With just a few drops of blood, the company's technology could supposedly run hundreds of tests. But it turns out Theranos's technology was too good to be true. Holmes and the former president of Theranos, Sunny Balwani, now face federal fraud charges for engaging in schemes to defraud investors, doctors, and patients.

Many now wonder how Holmes could pull off such a large-scale deception and convince so many seemingly intelligent and influential people to believe it. It appears that Holmes's skill for storytelling and her passion allowed her to persuade investors and others to believe in the technology. Holmes would frequently tell others about her uncle, who was diagnosed with skin cancer that rapidly spread, eventually leading to his death. Holmes hoped that her company's blood-testing technology could prevent this from happening to other families. Unfortunately, the case against Holmes shows that she was likely motivated more by fame and money than revolutionizing the health care industry and saving lives.

However, narcissism may not be an entirely negative trait. For example, leadership expert Michael Maccoby believes that there are "productive narcissists," or leaders with a certain degree of narcissism that allows them to achieve their idealistic visions. Maccoby asserts that many respected and influential leaders in history, like the pioneers of the technological revolution Andy Grove, Steve Jobs, and Bill Gates, were productive narcissists. Without this trait, these leaders would lack the confidence to convince others of their abilities and ideas.

On the other hand, some scholars see true narcissistic leaders as damaging to organizations. Field studies have shown that narcissistic CEOs are more likely to engage in fraud and white-collar crime. Furthermore, when in powerful positions, narcissistic CEOs tend to fire or ignore those who challenge them. Charles O'Reilly, a researcher who studies how CEOs' personalities shape organizations, believes there is a key to determining if someone is a productive or destructive narcissist. Organizations often only rely upon interviews and other hiring methods, which a narcissistic leader can easily manipulate. Instead, gathering testimonies or ratings of the leader's personality from individuals who worked with them can be revealing. These other sources of information could ultimately save the organization from a narcissistic leader's potentially disastrous influence.[1]

Personality is indeed a strong factor for many life and work outcomes. Personality plays a major role in success in the workplace, although the effects are not always direct; sometimes they are nuanced. We will explain extroversion, conscientiousness, openness, agreeableness, and emotional stability: the traits that comprise the Big Five, the most well-defined and supported personality framework to date. We will also review frameworks that describe an individual's personality and tendencies.

Linking Individuals to the Workplace

5-1 Describe the differences between person–job fit and person–organization fit.

Years ago, organizations were concerned with personality, in part because they used it to match individuals to specific jobs. That concern has expanded to include how well the individual's personality *and* values match the organization.

Why? Because managers today are less interested in an applicant's ability to perform a *specific* job than with the ability to further the organization's mission and to retain the employee (rather than leaving for another organization).[2] For example, Twegos, a firm that provides a person–organization value fit assessment, assesses truck driver fit with their carrier, trainers, dispatchers, and managers in order to increase engagement and reduce turnover.[3] Still, one of the first types of fit managers look for is person–job fit.

Person–Job Fit

The effort to match job requirements with personality characteristics is described by John Holland's **personality–job fit theory**, one of the more proven theories in use internationally.[4] The Vocational Preference Inventory questionnaire contains 160 occupational titles. Respondents indicate which they like or dislike, and their answers form occupation interest profiles. Holland presented six personality types (see the following section on personality) and proposed that satisfaction and the propensity to leave a position depend on how well individuals match their personalities to a job. Exhibit 5-1 describes the six types, their personality characteristics, and examples of the congruent occupations for each. Notably, this theory tends to be supported with person–job fit strongly predicting job satisfaction, organizational commitment, and intentions to quit.[5]

personality–job fit theory A theory that identifies six personality types and proposes that the fit between personality type and occupational environment determines satisfaction and turnover.

There are diversity implications for person–job fit that speak to workers' expectations that jobs will be tailored to them. In individualistic countries where workers expect to be heard and respected by management, increasing person–job fit by tailoring the job to the person increases the individual's job satisfaction. However, in collectivistic countries, person–job fit is a weaker predictor of job satisfaction because people do not expect to have a job tailored to them, so they value person–job fit efforts less.[6] Therefore, managers in collectivistic cultures should not violate cultural norms by designing jobs for individuals; rather, they should seek people who will likely thrive in jobs that have already been structured.[7] Furthermore, research suggests that giving workers more autonomy in designing their jobs to match their strengths and interests may be more effective for older employees than younger ones. As employees age, they become more aware of their own strengths and interests, meaning that giving them the opportunity to fit the job to their interests, personalities, and strengths can be an effective approach.[8]

Exhibit 5-1 Holland's Typology of Personality and Congruent Occupations

Type	Personality Characteristics	Congruent Occupations
Realistic: Prefers physical activities that require skill, strength, and coordination	Shy, genuine, persistent, stable, conforming, practical	Mechanic, drill press operator, assembly-line worker, farmer
Investigative: Prefers activities that involve thinking, organizing, and understanding	Analytical, original, curious, independent	Biologist, economist, mathematician, news reporter
Artistic: Prefers ambiguous and unsystematic activities that allow creative expression	Imaginative, disorderly, idealistic, emotional, impractical	Painter, musician, writer, interior decorator
Social: Prefers activities that involve helping and developing others	Sociable, friendly, cooperative, understanding	Social worker, teacher, counselor, clinical psychologist
Enterprising: Prefers verbal activities in which there are opportunities to influence others and attain power	Self-confident, ambitious, energetic, domineering	Lawyer, real estate agent, public relations specialist, small business manager
Conventional: Prefers rule-regulated, orderly, and unambiguous activities	Conforming, efficient, practical, unimaginative, inflexible	Accountant, corporate manager, bank teller, file clerk

Person–Organization Fit

We have noted that researchers have looked at matching people to organizations and jobs. If an organization has a dynamic and changing environment and needs employees able to change tasks readily and move easily between teams, it is more important that employees' personalities and individual differences fit with the overall organization's culture than with the characteristics of any specific job.

person–organization fit A theory that people are attracted to and selected by organizations that match their values and leave when there is no compatibility.

Person–organization fit essentially means that people are attracted to and are selected by organizations that match their values (discussed later in this chapter) and they leave organizations that are not compatible with them.[9] For instance, we could expect that extroverts fit well with organizations that value relationships and socialization.[10] Following these guidelines when hiring should yield employees who fit better with the organization, which should, in turn, result in higher employee satisfaction and reduced turnover.[11] Research on person–organization fit also looked at whether people's values match the organization's culture (see the chapter on organizational culture and change). A match predicts high job satisfaction and commitment to the organization as well as low turnover.[12] Interestingly, new research suggests that people tend to care more about how well an organization's values would be preferred by the typical person rather than one's own idiosyncratic preferences for values in an organization.[13] Furthermore, their fit perceptions do not involve comparing themselves to others or logically basing their opinions on how jobs make them feel. Rather, they are relatively automatic judgments that involve both affective reactions and feelings (e.g., attitudes).[14]

It is more important than ever for organizations to manage their image online because job seekers view company websites and social media presence as part of their pre-application process.[15] Applicants want to see a user-friendly website or social media page that provides information about company policies, philosophies, and corporate social responsibility (CSR) efforts.[16] These websites are so important to the development of perceived person–organization fit that improvements to their style (usability) and substance (policies) can lead to more applicants.[17] Furthermore, one study examined organizations' or founders' communication on social media and, more specifically, whether they displayed religious values. Applicants who shared the same religious values as the founder or organization were more likely to apply to the job, although most applicants were less likely to apply to the job if the company messaged about its religious values.[18] This study conveys how values communicated via social media can also affect applicant and employee fit perceptions.

Other Dimensions of Fit

Although person–job fit and person–organization fit are considered the most salient dimensions for workplace outcomes, other avenues of fit are worth examining. These include *person–group fit* and *person–supervisor fit*.[20] Person–group fit is important in team settings, where the dynamics of team interactions significantly affect work outcomes. Person–supervisor fit has become an important area of research because poor fit in this dimension can lead to lower job satisfaction and reduced performance. There is even some truth to the phrase "misery loves company," as some research suggests that congruence between leader and follower cynicism predicts follower job performance.[21]

All dimensions of fit are sometimes broadly referred to as person–environment fit. Each dimension can predict work attitudes, which are partially based on culture. A meta-analysis of person–environment fit in East Asia, Europe, and North America suggested that the dimensions of person–organization and person–job fit are the strongest predictors of positive work

Toward a Better World

Uber: In the Median or Back on the Road Again?

When you think about CSR and sustainability, you probably *do not* think about Uber. Instead, you probably think of the appalling press it has received over the years, which prompted the #deleteuber tag circulating on social media. Uber has been burdened with so many scandals that researchers and reporters created timelines, overviews, and even a website to document them. Many have looked to Uber's founder and former CEO, Travis Kalanick, as the potential wellspring for these scandals. Kalanick established a toxic, win-at-all-costs, "tech bro" workplace. In 2017 he was forced to step down as CEO following several scandals, and at the end of 2019 Kalanick stepped down from the board.

Enter Dara Khosrowshahi. The current CEO of Uber has had his work cut out for him. He made it clear that Kalanick would not be involved in the day-to-day running of Uber. He stressed that he would work to clean up the company's image and transform the culture under his leadership. Even the circumstances surrounding the appointment of a new CEO were scandalous. Khosrowshahi was not originally a front-runner in the hiring process. In fact, one firm promised to drop a lawsuit against Uber if it appointed an alternative, favored front-runner as CEO (which many on the board saw as blackmail). This action caused support for this front-runner candidate to switch to Khosrowshahi, ultimately leading him to become CEO.

Years after his appointment, Khosrowshahi led an effort to replace Uber's fourteen corporate values in 2017. The U.S. attorney general and his law firm recommended this action following an investigation of Uber's internal practices. Many believed that the original values encouraged, reinforced, and justified unethical behavior at all organizational levels. These values included vague platitudes like "superpumpedness," "always be hustling," "toe-stepping," and "champion's mindset" that seemed to encourage conflict and unethical behavior. Khosrowshahi noted that Uber's culture needed to change from one that embraces growth, no matter the cost, toward one that embraces responsible and sustainable growth. To accomplish this, Khosrowshahi elicited submissions of replacement values from more than a thousand employees, which were voted on more than twenty thousand times by employees at the company. He also commissioned twenty workgroups to help define and refine them. The new values are direct and leave little room for interpretation, including: "We do the right thing. Period." "We celebrate differences . . . ensure people of diverse backgrounds feel welcome." "We value ideas over hierarchy." This approach was interesting because it started with the *people*. Often, when CEOs assume power, they set the values themselves and transmit them from the top down. However, critics have suggested that changing values on paper is not enough. As Fred Perrotta (CEO of Tortuga) commented, "Your values are what you *live*, not what you *write*." Values in many ways underlie organizational behavior, leading people within organizations to attract, select, and retain people who fit with those values. Therefore, Uber needs to put into practice what it writes on paper.

Although Uber has made steps in the right direction, image is everything. The data shows that Uber is *still* struggling with its reputation and image. Brand sentiment is still low, and it is still struggling to win back customers. However, there are *some* wins to be found. For instance, Uber's current value of diversity and inclusion may have led the company toward its perfect score on the 2020 Corporate Equality Index. Furthermore, Uber has made efforts to establish and continuously improve CSR initiatives. Its competition, Lyft, continues to outshine Uber in its CSR-related communication and messaging, which is incredibly important for reinforcing the values to consumers. It is unclear whether Uber will regain traction or yet again spin out. However, Uber's case makes it abundantly clear that leadership and values play a vital role in CSR. Employees need to be actively engaged to realize CSR goals fully. Employees and managers alike need to recognize that core values become a part of the company's DNA and the DNA of the people who comprise the company.[19]

attitudes and performance in North America. These dimensions are important to a lesser degree in Europe, and they are the least important in East Asia.[22] Organizational leaders' can manage employees' perceptions of fit, even for jobs that many people do not want (e.g., dirty work), by matching employee individual differences to the job, providing realistic previews of the work and organization, training and socialization to help new employees navigate the job/organization, and providing ongoing support to employees.[23]



Person–organization fit is important to Sheila Marcelo, founder and CEO of Care.com, an online sitter and care service. Marcelo seeks to hire employees who share the company's culture of helping others and who are passionate about working on projects that achieve Care.com's mission of improving the lives of families and caregivers.

Source: Kelvin Ma/Bloomberg/Getty Images

Personality

5-2 Describe personality, the way it is measured, and the factors that shape it.

The needs of a business are broad and varied. People are needed to keep track of accounting and finance, to ensure that the right employees are hired and that training needs are met, to market and sell the products or services the company provides, to research and develop better ways of doing things, and so on. Consider this: If every employee you hired was the same and had identical personalities, would they all be equally effective at meeting these needs?[24] Before we can answer this question, we need to address a more basic one: What is personality?

What Is Personality?

When we speak of someone's personality, we use many adjectives to describe how they act and seem to think; in one study, participants used 624 distinct adjectives to describe people they knew.[25] Thinking of one of your coworkers, you might think they are "fun," "outgoing," "nice," or "hard-working," or maybe you think they are "lazy," "aloof," "close-minded," or "nosy." In organizational behavior (OB), we organize these characteristics into overall traits describing a person's personality.

personality The total number of ways in which an individual reacts to and interacts with the world around them.

Defining Personality For our purposes, think of **personality** as the sum of ways in which an individual reacts to and interacts with the world around them. We most often describe personality in terms of the measurable traits a person exhibits.

personality traits Enduring characteristics that describe an individual's behavior.

Early work on personality tried to identify and label all the enduring characteristics, such as the adjectives you listed previously to describe a coworker, that describe an individual's behavior. When someone frequently exhibits these characteristics across many situations and when they are relatively enduring over time, we call them **personality traits**.[26] The more consistent the characteristic over time and the more frequently it occurs in various situations, the more important the trait is in describing the individual.

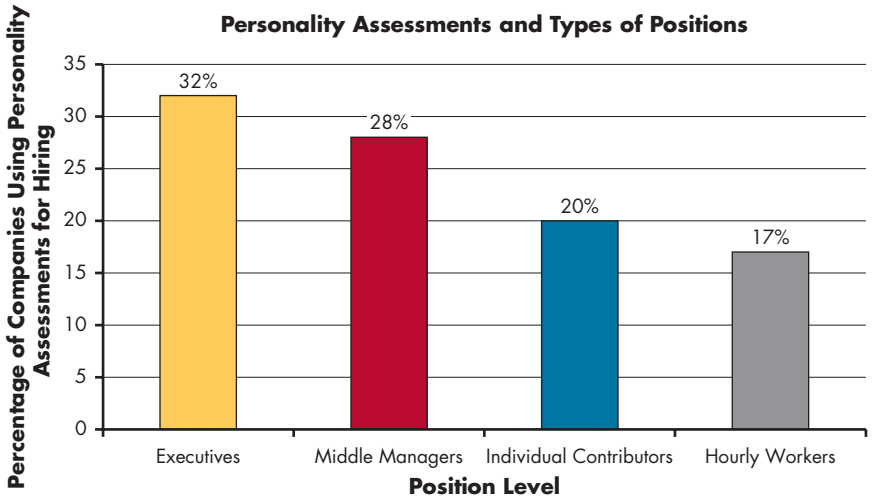
Our culture influences the way we describe ourselves and others. Although many personality traits do tend to emerge across cultures (see the Big Five Model later in this chapter), [27] it appears that some traits do not emerge in certain cultures—moreover, certain unique personality traits might emerge.[28] For instance, research in Chinese contexts has uncovered unique traits that focus on interpersonal relatedness as well as a relative absence of openness traits.[29] As such, when interacting with people from other cultures, it is imperative to keep in mind that there may be cultural differences *even when it comes to personalities.*

Measuring Personality Personality assessments have been increasingly used in diverse organizational settings. In fact, 89 of the Fortune 100 companies and 57 percent of all large U.S. companies use them,[30] including Xerox, McDonald's, and Lowe's.[31] In addition, an estimated 200 federal agencies pay for personality testing as part of their training programs.[32] Personality tests are useful in hiring decisions and help managers forecast who is best for a job.[33] Furthermore, you might think that personality tests are really only used to hire middle managers and executives. However, more and more organizations are beginning to use personality tests to hire both full-time and hourly employees (see OB Poll).[34]

The most common means of measuring personality is through self-report surveys in which individuals evaluate themselves on a series of factors, such as "I worry a lot about the future." [35] In general, when people know their personality scores are going to be used for hiring decisions, they rate themselves much higher on desirable traits (e.g., conscientiousness) than if they are taking the test to learn more about themselves.[36] This presents a problem of applicants and candidates "faking" their responses to the personality test, although there are ways to design personality tests to lower the chances this will happen.[37] Another problem is accuracy;[38] for instance, personality ratings from someone who knows you well (e.g., someone you have worked with for five years) might be more accurate than ratings given by a relative stranger to you.[39]

OB POLL

Are Personality Assessments Only Used for High-Level Positions?



Source: Based on K. Rockwood, "How Accurate Are Personality Assessments," *Society for Human Resource Management*, November 21, 2019, https://www.shrm.org/hr-today/news/hr-magazine/winter2019/pages/how-accurate-are-personality-assessments.aspx

Observer-ratings surveys provide an independent assessment of personality. Here, a coworker or another observer does the rating. Though the results of self-reports and observer-ratings surveys are strongly correlated, research suggests that observer-ratings surveys predict job success more than self-ratings alone.[40] However, each can tell us something unique about an individual's behavior, so a combination of self-reports and observer reports predicts performance better than any one type of information. What makes for a good observer? Emotional intelligence (see the chapter on emotions and mood) may play a role here: One study found that accuracy in judging negative versus positive emotional displays played a role in how accurately observers judged emotional stability versus extroversion, respectively.[41]

Modern advancements in technology and artificial intelligence (AI) (e.g., machine learning; see introductory chapter) have also improved the ability to score personality tests, reduce faking, and adaptively present items for more accurate personality assessment. For example, machine learning has been used to select the most informative questions for traditional personality tests,[42] detecting people who fake personality tests,[43] measuring personality through the actual language and words people use on social media,[44] and even scoring job applicants' personal essays![45]

Personality Frameworks

5-3 Describe the strengths and weaknesses of the Myers-Briggs Type Indicator (MBTI) personality framework, the Big Five Model, and the Dark Triad.

Throughout history, people have sought to understand what makes individuals behave in different ways. Many of our behaviors stem from our personalities, so understanding the components of personality helps us predict behavior. For example, an employee who is low on tact as a personality trait (a characteristic of "agreeableness") may be more likely to be rude or direct at inappropriate times, which can in turn upset or anger coworkers.[46] Theoretical frameworks and assessment tools help us categorize and study these dimensions of personality.

The most widely used and best-known personality frameworks are the Myers-Briggs Type Indicator (MBTI) and the Big Five Model. Both describe a person's total personality through exploration of the facets of personality. However, the Myers-Briggs has little empirical support for its use, whereas the Big Five is built on a solid foundation of decades of research. (Clearly, evidence-based practitioners and managers would do well to consider the Big Five over the MBTI.) Other frameworks, such as the Dark Triad, explain certain aspects, but not the total, of an individual's personality. We discuss each in the following sections, but let's begin with the dominant frameworks.

The Myers-Briggs Type Indicator

Myers-Briggs Type Indicator (MBTI) A personality test that taps four characteristics and classifies people into one of sixteen personality types.

The **Myers-Briggs Type Indicator (MBTI)** is the most widely used personality assessment instrument in the world.[47] It is a one-hundred-question personality test that asks people how they usually feel or act in situations. Respondents are classified as extroverted or introverted (E or I), sensing or intuitive (S or N), thinking or feeling (T or F), and judging or perceiving (J or P):

- *Extroverted (E) versus Introverted (I).* Extroverted individuals are outgoing, sociable, and assertive. Introverts are quiet and shy.
- *Sensing (S) versus Intuitive (N).* Sensing types are practical and prefer routine and order, and they focus on details. Intuitives rely on unconscious processes and look at the big picture.
- *Thinking (T) versus Feeling (F).* Thinking types use reason and logic to handle problems. Feeling types rely on their personal values and emotions.
- *Judging (J) versus Perceiving (P).* Judging types want control and prefer order and structure. Perceiving types are flexible and spontaneous.

The MBTI describes personality types by identifying one trait (e.g., extroversion) from each of the four pairs (e.g., extroversion-introversion) and combining them to form a personality type. For example, Introverted/Intuitive/Thinking/Judging people (INTJs) are visionaries with original minds and great drive. They are skeptical, critical, independent, determined, and often stubborn.

There are a litany of problems with the use of the MBTI.[48] First, the MBTI was developed in a rather unscientific, subjective way based on Carl Jung's neo-Freudian theories. Although popular and historically influential, very little empirical evidence and research actually support the theory the MBTI is based on. As Professor Ronald Riggio notes, "Jung's theories are not considered to be solid. He wasn't an empiricist. He didn't collect data."[49] Second, evidence does not support the validity of the MBTI as a measure of personality; in fact, most of the evidence is against it.[50] As Professor Dan Ariely sardonically noted about MBTI results, "Next time, just look at the horoscope. It is just as valid and takes less time."[51] Third, the MBTI forces a person into one type or another; that is, you are either introverted or extroverted. There is no in-between. Fourth, when people retake the assessment, they often receive different results. An additional problem is in the difficulty of interpretation. There are levels of importance for each of the MBTI facets, and there are separate meanings for certain combinations of facets, all of which require trained interpretation that can leave room for error.

If the MBTI is such a terrible personality measure, why do so many people still use it? In Professor Merve Emre's book on the history of the MBTI, Emre suggests the test is written to be so nonjudgmental that no matter what you select, the results are desirable and appealing. The test also satisfies a desire to know more about yourself in a simple, easy way. As such, the MBTI crafts a very "appealing fantasy" of a coherent understanding of "who you are" and how to maximize your potential using this knowledge.[52] As a final issue with the MBTI that directly concerns the study of OB, the MBTI does not predict job performance or other important organizational outcomes. Because results tend to be unrelated to job performance, managers should consider using the Big Five Personality Model, discussed next, as the personality selection test for job candidates instead.

The Big Five Personality Model

The MBTI may lack strong supporting evidence, but an impressive body of research supports the **Big Five Model**, which proposes that five basic dimensions encompass most of the differences in human personality.[53] Test scores of these traits do a very good job of predicting how people behave in a variety of real-life situations[54] and remain relatively stable for an individual over time, with some daily variations.[55] These are the Big Five factors:

Big Five Model A personality model that proposes five basic dimensions encompass most of the differences in human personality.

- *Conscientiousness.* The **conscientiousness** dimension is a measure of personal consistency and reliability. A highly conscientious person is responsible, organized, dependable, and persistent. Those who score low on this dimension are easily distracted, disorganized, and unreliable.
- *Emotional stability.* The **emotional stability** dimension taps a person's ability to withstand stress. People with emotional stability tend to be calm, self-confident, and secure. High scorers are more likely to be positive and optimistic and experience fewer negative emotions (e.g., nervousness, anxiety, insecurity); they are generally happier than low scorers.
- *Extroversion.* The **extroversion** dimension captures our relational approach toward the social world. Extroverts tend to be gregarious, assertive, and sociable. They experience more positive emotions than do introverts, and they more freely express these feelings. On the other hand, introverts (low extroversion) tend to be more thoughtful, reserved, timid, and quiet.

conscientiousness A personality dimension that describes someone who is responsible, dependable, persistent, and organized.

emotional stability A personality dimension that characterizes someone as calm, self-confident, and secure (positive) versus nervous, anxious, and insecure (negative).

extroversion A personality dimension describing someone who is sociable, gregarious, and assertive.

openness to experience A personality dimension that characterizes someone in terms of imagination, artistic sensitivity, and curiosity.

agreeableness A personality dimension that describes someone who is good natured, cooperative, and trusting.

- *Openness to experience.* The **openness to experience** dimension addresses the range of a person's interests and their fascination with novelty. Open people are creative, curious, and artistically sensitive. Those at the low end of the category are conventional and find comfort in the familiar.
- *Agreeableness.* The **agreeableness** dimension refers to an individual's propensity to defer to others. Agreeable people are cooperative, warm, and trusting. You might expect agreeable people to be happier than disagreeable people. They are, but only slightly. When people choose organizational team members, agreeable individuals are usually their first choice. In contrast, people who score low on agreeableness are cold and antagonistic.

How Do the Big Five Traits Predict Behavior at Work? There are many relationships between the Big Five personality dimensions and job performance,[56] and we are learning more about them every day. Let's explore one trait at a time, beginning with the strongest predictor of job performance—conscientiousness.

Conscientiousness at Work Researchers have stated, "Personal attributes related to conscientiousness… are important for success across many jobs, spanning across low to high levels of job complexity, training, and experience."[57] Employees who score higher in conscientiousness develop higher levels of job knowledge, probably because highly conscientious people learn more (conscientiousness may be related to grade point average [GPA]),[58] and these levels correspond with higher levels of job performance and organizational citizenship behavior (OCB; see the introductory chapter).[59] Conscientious people are also less likely to engage in counterproductive work behaviors (CWBs),[60] think less about leaving their organizations, and can adapt to changing task demands and situations.[61] Conscientious people also engage in less unsafe behavior and tend to have fewer accidents than those who are less conscientious.[62]



General Motors CEO Mary Barra is unusual in that Barra appears to score high on all the Big Five personality dimensions. This unique combination of traits perhaps guided Barra to become the first woman CEO of a major global automaker.

Source: Michael Buholzer/Photoshot/Newscom

Exhibit 5-2 Traits That Matter Most to Business Success at Buyout Companies

Most Important	Less Important
Persistence	Strong oral communication
Attention to detail	Teamwork
Efficiency	Flexibility/adaptability
Analytical skills	Enthusiasm
Setting high standards	Listening skills

Source: Based on S. N. Kaplan, M. M. Klebanov, and M. Sorensen, "Which CEO Characteristics and Abilities Matter?" *The Journal of Finance* 67, no. 3 (2012): 973–1007.

Conscientiousness is important to overall organizational success. As Exhibit 5-2 shows, a study of the personality scores of 313 chief executive officer (CEO) candidates in private equity companies (of whom 225 were hired) found conscientiousness—in the form of persistence, attention to detail, and setting high standards—was more important to success than other traits.[63] Like any trait, conscientiousness has pitfalls. Extremely conscientious individuals can be too deliberate and perfectionistic, resulting in diminished happiness and performance, which includes task performance, safety performance, and OCB.[64] They may also become too focused on their own work to help others in the organization.[65] Finally, they are often less creative, especially artistically.[66]

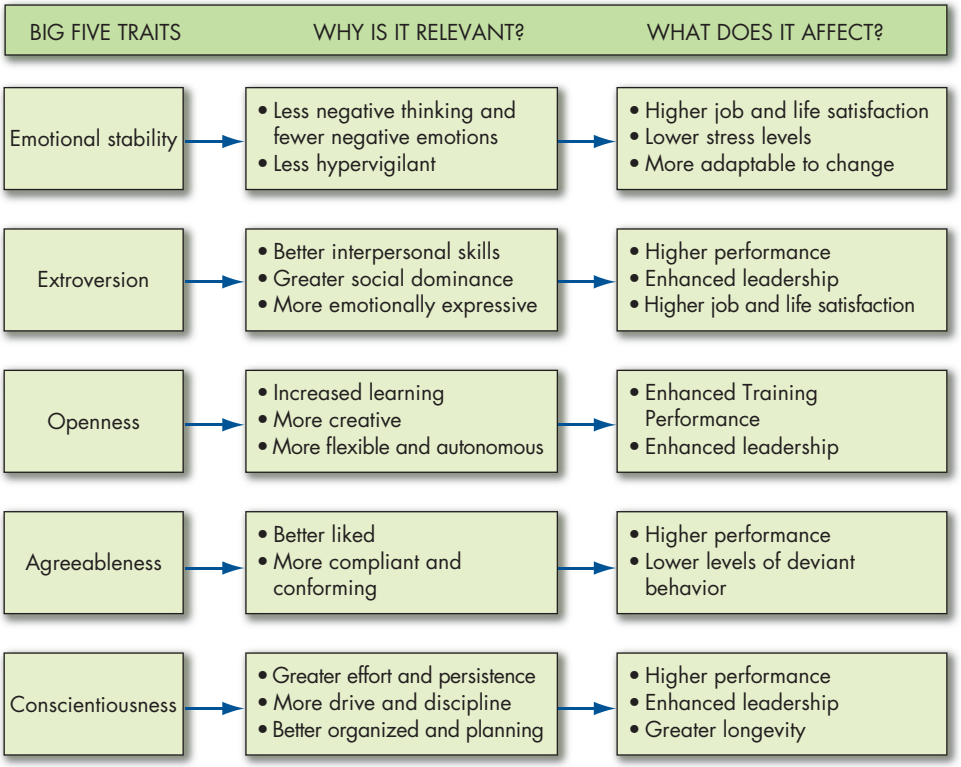
Conscientiousness is the best overall predictor of job performance. However, the other Big Five traits are also related to aspects of performance and have other implications for work and for life, as Exhibit 5-3 summarizes.

Emotional Stability at Work Of the Big Five traits, emotional stability is most strongly related to life satisfaction and job satisfaction as well as reduced burnout and intentions to quit.[67] People with high emotional stability can adapt to unexpected or changing demands in the workplace.[68] At the other end of the spectrum, individuals with low emotional stability, who may be unable to cope with these demands, may experience burnout.[69] These people also tend to experience work–family conflict and ostracism, which can affect work outcomes.[70] Given these straining effects, employees low on emotional stability are more likely to engage in CWBs, less likely to engage in OCBs, and less likely to be motivated at work.[71]

Extroversion at Work People with extroverted personality traits experience a small, persistent advantage in their jobs and in their careers. A review of a whopping 97 published meta-analyses strongly supports the "extrovert advantage," which is primarily due to the positive emotions that extroverts tend to experience (and not primarily due to their adeptness in social interaction, like one might assume).[72] Extroverts tend to be able to better adapt to career changes (e.g., finding a job after a termination).[73] Furthermore, extroverts experience generally high job satisfaction and reduced burnout.[74] At the group and team level, extroversion is a relatively strong predictor of leadership emergence and behaviors in groups.[75] However, extroverts can appear to be dominating and are prone to risk-taking, which can be disadvantageous for jobs that do not require frequent social interaction.[76]

Openness at Work Open people tend to be creative and innovative[77] and are more likely to be effective leaders and more comfortable with ambiguity—they

Exhibit 5-3 Model of How Big Five Traits Influence OB Criteria



cope better with organizational change and are more adaptable.[78] While openness is not related to initial performance on a job, individuals higher in openness are less susceptible to a decline in performance over a longer time period.[79] Open people also experience less work–family conflict.[80]

Agreeableness at Work Agreeable individuals tend to do better in interpersonally oriented jobs such as customer service. They experience less work–family conflict and are less susceptible to turnover.[81] They also engage in a high degree of OCBs[82] and a low degree of CWBs[83] and are less likely to be ostracized by their work groups.[84] Lastly, agreeableness is associated with lower levels of career success (especially earnings), perhaps because highly agreeable people are less willing to assert themselves.[85]

Interestingly, agreeableness might be more important for organizational commitment (see the chapter on attitudes and job satisfaction) in some cultures. One review of research on nearly twenty thousand employees worldwide found that agreeableness was more predictive of organizational commitment in collectivistic cultures rather than individualistic cultures (see later in this chapter for more information on collectivistic versus individualistic cultures).[86]

Furthermore, given that more companies are sending their employees on global assignments, it is important to understand which other personality traits are most important for adjusting to living in different cultures. Research suggests that extroversion is the most important trait predicting expatriate adjustment, followed by emotional stability and openness.[87] A study on 2,500 international exchange students worldwide corroborated this, with extroversion

significantly reducing the stress of being in a new culture and improving cultural adaptation.[88]

Research indicates that the Big Five traits have the most verifiable links to important organizational outcomes, but they are not the only traits a person exhibits, nor are they the only ones with OB implications. Let us discuss some other traits, known collectively as the Dark Triad.

The Dark Triad

Outside the Big Five framework, researchers have identified three other socially *undesirable* traits, which we all have in varying degrees: Machiavellianism, narcissism, and psychopathy. Owing to their negative nature, researchers have labeled these the **Dark Triad**—though they do not always occur together.[89] In reviewing these traits, you might remember coworkers or bosses you have had previously who could be characterized by these traits and the consequences these traits had in your workplace. These traits can literally harm an organization's financial performance. For example, one study of 101 hedge fund managers found that those who were narcissistic and psychopathic tended to have worse financial performance than their peers.[90] These traits might not be as far removed as you think; after all, "not all psychopaths are in prison—some are in the board room."[91]

Dark Triad A constellation of negative personality traits consisting of Machiavellianism, narcissism, and psychopathy.

The Dark Triad may sound sinister, but these traits are not clinical pathologies. They might be expressed particularly strongly when an individual is under stress and unable to moderate any inappropriate responses. Although dark personality traits can have their upsides in certain situations (at least in the short term),[92] sustained high levels of dark personality traits can cause individuals to derail their careers and personal lives.[93]

Machiavellianism Aiden is a young bank manager in Shanghai. Aiden has received three promotions in the past four years and makes no apologies for using aggressive tactics. "I do whatever I have to do to get ahead," Aiden says. Aiden would be termed Machiavellian.

The personality characteristic of **Machiavellianism** (often abbreviated *Mach*) is named after Niccolò Machiavelli, who wrote in the sixteenth century about how to gain and use power. An individual high in Machiavellianism is pragmatic, maintains emotional distance, and believes ends can justify means. "If it works, use it" is consistent with a high-Mach perspective. High Machs manipulate more, win more, and are persuaded less by others but persuade others more than do low Machs.[94] They are more likely to act aggressively and engage in CWBs and, perhaps less obviously, will even engage in OCBs if it is instrumental in acquiring more power or status.[95] Surprisingly, Machiavellianism does not positively predict overall job performance.[96] High-Mach employees, by manipulating others to their advantage, win in the short term at a job, but they lose those gains in the long term because they are not well liked.

Machiavellianism The degree to which an individual is pragmatic, maintains emotional distance, and believes that ends can justify means.

There are ethical implications for Machiavellians' behavior. High-Mach job seekers were less positively affected by the knowledge that an organization engaged in a high level of CSR,[97] suggesting that high-Mach people may care less about sustainability issues. Machs' ethical leadership behaviors are also less likely to translate into followers' work engagement because followers see through these behaviors and realize that they are a case of surface acting (see the chapter on emotions and moods).[98]

Narcissism Avery likes to be the center of attention. Avery thinks of Avery as having a very large number of talents ("See, even 'a very' can be found in my name!" Avery says) and having a grandiose and profound influence on others

and is very sensitive to criticism. Avery is a narcissist. The trait is named for the Greek myth about Narcissus, a youth so vain and proud he fell in love with his own image. **Narcissism** describes a person who has a grandiose sense of self-importance, requires excessive admiration, and is arrogant. Narcissists often have fantasies of grand success, a tendency to exploit situations and people, a sense of entitlement, and a lack of empathy.[99] However, narcissists can also be hypersensitive and fragile.[100]

narcissism The tendency to be arrogant, have a grandiose sense of self-importance, require excessive admiration, and possess a sense of entitlement.

While narcissism seems to be relatively unrelated to job effectiveness or OCB (except when it makes them look good),[101] it is one of the largest predictors of increased CWB in individualistic cultures—but not in collectivist cultures that discourage self-promotion.[102] Narcissists commonly think they are overqualified for their positions.[103] When they receive feedback about their performance, they often tune out information that conflicts with their positive self-perception, but they will work harder if rewards are offered.[104] Narcissist managers are even selective about the relationships they form with their subordinates, often prioritizing those who give positive, noncritical feedback (ultimately reducing the voice of all subordinates).[105] Research using data compiled over one hundred years has shown that narcissistic CEOs of baseball organizations generate higher levels of manager turnover, although members of external organizations see them as more influential.[106]

On the bright side, narcissists may be more charismatic than others.[107] They are more likely to be chosen for leadership positions, and medium ratings of narcissism (neither extremely high nor extremely low) are positively correlated with leadership effectiveness.[108] Some evidence suggests that narcissists are more adaptable and make better business decisions than others when the issue is complex.[109]

Narcissism and its effects are not confined to CEOs or celebrities. Like the effects of Machiavellianism, those of narcissism vary by context but are evident in all areas of life.

Psychopathy Psychopathy is part of the Dark Triad, but in OB, it does not connote clinical mental illness. In the OB context, **psychopathy** is defined as a lack of concern for others and a lack of guilt or remorse when actions cause harm.[110] Measures of psychopathy attempt to assess the motivation to comply with social norms; impulsivity; willingness to use deceit to obtain desired ends; and disregard, that is, lack of empathic concern for others.

psychopathy The tendency for a lack of concern for others and a lack of guilt or remorse when actions cause harm.

Research is not consistent about whether psychopathy is important to work behavior. One review found little correlation between measures of psychopathy and job performance or CWBs.[111] Another found that antisocial personality, which is closely related to psychopathy, was positively related to advancement in the organization but unrelated to other aspects of career success and effectiveness.[112] Still other research suggests psychopathy is related to the use of hard influence tactics (threats, manipulation), bullying work behavior (physical or verbal threatening), and inappropriate interpersonal behavior during meetings and suggests that such employees do not feel remorseful for their actions.[113] The cunning displayed by people who score high on psychopathy may thus help them gain power in an organization but keep them from using it toward healthy ends for themselves or their organizations.

Other Frameworks

The Dark Triad is a helpful framework for studying the three dominant dark-side traits in current personality research, and researchers are exploring other traits as well. For instance, the DiSC framework is a circumplex model (similar to the

An Ethical Choice

Do Certain Personality Traits Make You More Unethical?

If one were to ask people if they are ethical, most would say yes. Indeed, evidence suggests that most people, universally and globally, believe in a "true self" that is morally "good" and "just." Despite this ubiquitous belief, research reveals that, in many ways, people's (un)ethical behavior can be attributed to differences in personality traits.

These personality traits can be more typical ones that come to mind, such as the facets of the Big Five. For instance, prior research has demonstrated that people low on emotional stability, agreeableness, and conscientiousness are much more prone to engage in unethical behaviors, regardless of whether they are directed toward other individuals or the organization. Some may think of other frameworks as well, including the Dark Triad and honesty traits, which clearly have linkages to (un)ethical behavior. (People who tend to exhibit traits associated with dishonesty, Machiavellianism, narcissism, and psychoticism are probably more likely to do unethical things.)

But beyond examining personality traits across contexts, people also have relatively stable aspects of themselves that lead to differences in (un)ethical behavior. These individual differences comprise what researchers have described as "the moral self." The concept of the moral self is not a new one—scholars and philosophers have been pondering this question for millennia. For instance, Aristotle proposed that the moral self is a holistic understanding of the self that is grounded in character and virtue. In many ways, character and virtue are related to the values that people espouse and put into practice, another individual difference discussed within this chapter on personality and individual differences.

Modern researchers view the moral self as the degree to which morality and ethicality are important to a person, comprise a central aspect of their identity, and motivate them to behave ethically. These ideas make logical sense—if morality were important to someone, would they be more likely to think through ethical situations and behave in an ethical way? The answer is most likely yes. Another way in which people differ in the moral self is in moral emotions (as discussed in the chapter on emotions and mood). Some people are more prone to experiencing moral emotions; emotions like anger, contempt, shame, and guilt can drive people to engage in (un)ethical behavior, whereas more callous, nonemotional responses may cause people to disregard the ethical aspects of situations.

Do certain personality traits make people more (un)ethical? In short, yes—certain personality traits can make people more prone to engaging in (un)ethical behaviors. But people do not exist in a vacuum—the strength of the situation and the surrounding context matter to an incredible degree. Moreover, this does not mean that one's personality forces one to behave in a given way—just that some people may need to work harder to counteract their tendencies than others. So what can one do to come to terms with one's ethical dispositions and tendencies? Research suggests that self-awareness and self-monitoring are key. Those with confusing or conflicting moral standards, poor impulse control, and a lack of a drive to self-monitor may be more likely to experience ethical lapses. On the other hand, when people establish clear and viable standards, self-monitoring skills, and a drive to change, they may be more likely to counteract their unethical impulses.[114]

affective circumplex; see the chapter on emotions and mood),[115] which suggests that personality characteristics can be represented on a circle with more similar traits in closer proximity, whereas more dissimilar traits are positioned farther apart. Similar to the MBTI,[116] people cluster into personality "types" based on their primary characteristic:[117] dominating (D), influencing (i), steadiness (S), and conscientiousness (C), although the framework recognizes that "people are not their types." Despite the DiSC publishers' claims of validity and reliability evidence[118] and its mounting popularity as an alternative to the MBTI, few academic research studies have scientifically examined the validity of the DiSC personality framework. More research and evidence are needed on the DiSC.

One emerging framework incorporates an additional trait into the Big Five framework. The HEXACO model is composed of a new trait, honesty-humility (H), and emotionality (E; i.e., emotional stability), extroversion (X), agreeableness (A), conscientiousness (C), and openness to experience (O).[119] The

addition of the H dimension came from cross-cultural studies that suggest that the English-centric early investigations that produced the Big Five essentially "missed" a dimension that began to emerge with studies conducted in non-European cultures (e.g., Korean, Hungarian, etc.).[120] The H dimension corresponds to people who are sincere, fair, modest, and humble. These individuals are not interested in social status, wealth, or money. Some research suggests that the addition of honesty-humility meaningfully adds to the Big Five, and the honesty-humility dimension has been found to predict ethically relevant outcomes, like abstaining from cheating (even in the presence of temptations or prompts to cheat).[121] This additional dimension has implications for OB, considering that dishonesty and cheating are extremely important for organizations (e.g., employees may cut corners, steal from the organization, etc.).[122]

Personality traits have both positive and negative aspects. The degree of each trait—those in the Big Five, the Dark Triad, and others—in a person and the combination of traits matter a great deal to organizational outcomes. It would be easy to make quick management decisions based on our observations, but it is important to keep discussions on personality in perspective and to consider other theories.

Other Personality Attributes Relevant to OB

5-4 Discuss how the concepts of core self-evaluation (CSE), self-monitoring, and proactive personality contribute to the understanding of personality.

As we have discussed, studies of traits have much to offer to the field of OB. Now we will look at other attributes that are powerful predictors of behavior in organizations: core self-evaluations, self-monitoring, and proactive personality.

Core Self-Evaluations (CSEs)

core self-evaluation (CSE) Bottom-line conclusions individuals have about their capabilities, competence, and worth as a person.

Core self-evaluations (CSEs) are bottom-line conclusions individuals have about their capabilities, competence, and worth as a person. People who have positive CSEs like themselves and see themselves as effective and in control of their environment. Those with negative CSEs tend to dislike themselves, question their capabilities, and view themselves as powerless over their environment.[123] As we discussed in the chapter on job attitudes, CSEs relate to job satisfaction because people who are positive on this trait see more challenge in their jobs and attain more complex jobs.

People with positive CSEs perform better than others because they set more ambitious goals, are more committed to their goals, and persist longer in attempting to reach them.[124] People who have high CSEs provide better customer service, are more popular coworkers, come up with creative solutions to problems, and may have careers that begin on a better footing and ascend more rapidly over time.[125] However, high CSEs can have their downsides—for instance, coworkers and supervisors may view those with excessively high CSEs unfavorably, especially if the individual appears to abstain from helping others in the workplace.[126]

CSE also has implications for diversity and employee effectiveness in different cultural contexts. Research also suggests that employees with positive CSEs tend to more effectively adapt to changes in their careers[127] and to international environments when working in new cultures.[128] As some examples, one study in a Chinese vehicle manufacturing plant found that CSEs were more positively related to job performance when individualism, rather than collectivism, was valued.[129] Furthermore, although one's language proficiency and nationality set employees in multinational teams apart as "different" from the rest of the group, their CSEs compensated for these differentiating factors, and they were able to become better leaders in their teams.[130]



Blake Mycoskie, founder of TOMS Shoes, is confident, capable, and effective. These high core self-evaluations enabled Mycoskie to found a company that uses profits to give shoes to children in need.

Source: Donato Sardella/WireImage/Getty Images

Self-Monitoring

Riley is always in trouble at work. Although Riley is competent, hardworking, and productive, Riley receives average ratings in performance reviews and seems to have made a career out of irritating the supervisors. Riley's problem is one of political ineptness and an inability to adjust to changing situations. As Riley says, "I'm true to myself. I don't remake myself to please others." Riley is a low self-monitor.

Self-monitoring describes an individual's ability to adjust behavior to external, situational factors.[131] High self-monitors show considerable adaptability in adjusting their behavior to external situational factors. They are highly sensitive to external cues and can behave differently in varying situations, sometimes presenting striking contradictions between their public personae and their private selves.[132] Low self-monitors like Riley cannot disguise themselves in that way. They tend to display their true dispositions and attitudes in every situation; hence, there is high consistency between who they are and what they do.

self-monitoring A personality trait that measures an individual's ability to adjust their behavior to external, situational factors.

High self-monitor employees show less commitment to their organizations but receive better performance ratings and are more likely to emerge as leaders.[133] High self-monitor managers tend to be more mobile in their careers, receive more promotions (both internal and cross-organizational), and are more likely to occupy central positions in organizations.[134] However, self-monitoring can be considered a mixed blessing; despite the aforementioned positive benefits, self-monitors may be seen as inauthentic, self-serving, or unprincipled.[135]

Proactive Personality

Did you ever notice that some people take the initiative to improve their current circumstances or create new ones? These are proactive personalities.[136] Those with a **proactive personality** identify opportunities, show initiative, take action, and persevere until meaningful change occurs, compared to others who generally react to situations.[137] For instance, a proactive personality is a key trait that

proactive personality People who identify opportunities, show initiative, take action, and persevere until meaningful change occurs.

Myth or Science?

We Can Accurately Judge Individuals' Personalities a Few Seconds After Meeting Them

Surprisingly, this statement appears to be true.

Research indicates that individuals can accurately appraise others' personalities only a few seconds after first meeting them or sometimes even from a photo. This "zero acquaintance" approach shows that, regardless of the way in which people first meet someone, whether in person or online, their first judgments about the other's personality have some validity. In one study, for example, individuals were asked to introduce themselves in, on average, 7.4 seconds. Observers' ratings of those individuals' extroversion were significantly correlated with the individuals' self-reported extroversion. Other research suggests personalities can be surmised from online profiles at zero acquaintance as well. One study even found that participants could determine the personality traits of individuals at the ends of the trait spectrum from viewing only photos.

Some traits, such as extroversion, are easier to perceive than others upon initial acquaintance, but less obvious traits like self-esteem are also often judged accurately by others. Even being forced to make intuitive, quick judgments rather than deliberate evaluations does not seem to undermine the accuracy of the appraisals.

Situations make a difference in the accuracy of the judgments for some personality traits. For example, although emotional stability is perhaps the most difficult trait to detect accurately, a recent study found emotional stability could be judged much more accurately when the situation made the individual react nervously. This makes sense when you consider that some situations activate or draw out a trait much more readily than others. Almost everybody looks calm when they are about to fall asleep!

The moderate accuracy of these "thin slices" (quick inferences from short experiences) helps explain the moderate validity of employment interviews, which we discuss in the human resources chapter. Specifically, research shows that interviewers make up their minds about candidates within two minutes of first meeting them. While this is hardly an ideal way to make important employment decisions, the research on personality shows that these judgments do have some level of validity. It is important to keep in mind, however, that though we can ascertain people's personalities quickly, we should keep an open mind and suspend judgment. There is always more to people than what first meets the eye.[138]

translates entrepreneurs' visions into reality.[139] Proactive individuals have many desirable behaviors that organizations covet. They have higher levels of job performance[140] and creativity[141] and do not need much oversight (and are given more autonomy as a result).[142] They tend to be satisfied with their jobs, committed to their organizations, and engaged in their work[143] and often achieve career success.[144]

A proactive personality may be important for work team members. Teams with high levels of proactive personality among members were more innovative.[145] Proactive team leaders can quickly manage leadership transitions and can more readily build commitment among team members, leading to heightened team performance.[146] Proactive individuals are also more likely to exchange information with others in a team, which builds trust in teammate relationships.[147] However, they are also more likely to be envied by their coworkers and teammates (and prone to social undermining or the withholding of help from others).[148]

In short, these personality traits predict many important organizational outcomes. However, there has been a renewed interest in how personality interacts with the environment or how traits are affected by the situation or context. The next section will examine how the work environment, including contexts and situations, affects the expression of personality traits.

Personality and Situations

5-5 Describe how the situation affects whether personality predicts behavior.

Some personality traits can be effective in almost any environment or situation. For example, conscientiousness is helpful to the performance of most jobs, and extroversion is related to emergence as a leader in most situations. However, we are learning that the effect of traits on behavior may also depend on the situation. While advancements have been made in terms of mapping the personality domain, similar progress has been made in how people describe *situations*. One impressive study culled 146.7 *billion* words from several different sources that have been used to describe situations. Using AI, these researchers found that situations can be described as positive-negative, complex, typical, important, or humorous.[149] Each of these characteristics can influence behavior or even the "activation" of personality traits.

Two theoretical frameworks, situation strength and trait activation, help describe *how* the context or situations can influence personality and behavior in the workplace.

Situation Strength Theory

Imagine you are in a meeting with your entire office. How likely are you to walk out, shout at a coworker, or turn your back on everyone? Probably highly unlikely. Now imagine you are working from home. You might work in your pajamas, listen to loud music, or shout at your cat walking across your keyboard. From these examples, you can see that many situations vary in their "strength."

Situation strength theory proposes that the way personality translates into behavior depends on the strength of the situation. By *situation strength*, we mean the degree to which norms, cues, or standards dictate appropriate behavior.[150] Strong situations show us what the right behavior is, pressure us to exhibit it, and discourage the wrong behavior. In weak situations, conversely, "anything goes," and thus we are freer to express our personality in behavior. Thus, personality traits better predict behavior in weak situations than in strong ones.[151]

situation strength theory A theory indicating that the way personality translates into behavior depends on the strength of the situation.

Components of Situation Strength Researchers have analyzed situation strength in organizations in terms of four elements:[152]

1. *Clarity*, or the degree to which cues about work duties and responsibilities are available and clear. Jobs high in clarity produce strong situations because individuals can readily determine what to do. For example, the job of janitor probably provides higher clarity about each task than that of a Hollywood actor's agent.
2. *Consistency*, or the extent to which cues regarding work duties and responsibilities are compatible with one another. Jobs with high consistency represent strong situations because all the cues point toward the same desired behavior. The job of acute care nurse, for example, probably has higher consistency than the job of manager.
3. *Constraints*, or the extent to which individuals' freedom to decide or act is limited by forces outside their control. Jobs with many constraints represent strong situations because an individual has limited individual discretion. Bank examiner, for example, is probably a job with stronger constraints than forest ranger.
4. *Consequences*, or the degree to which decisions or actions have important implications for the organization or its members, clients, suppliers, and so on. Jobs with important consequences represent strong situations because the environment is probably heavily structured to guard against mistakes. A surgeon's job, for example, has higher consequences than a language teacher's.

Organizational Situations Some researchers have speculated that organizations are strong situations because they impose rules, norms, and standards that govern behavior. These constraints are usually appropriate. For example, we would not want an employee to feel free to engage in sexual harassment, follow questionable accounting procedures, or clock into work only when the mood strikes.

Beyond the basics, though, it is not always desirable for organizations to create strong situations for their employees for several reasons. The elements of situation strength are often determined by organization rules and guidelines, which adds some objectivity to them. However, the perception of these rules influences how the person will respond to the situation's strength.[153] For instance, a construction supervisor who prioritizes safety will create a strong situation by establishing compelling norms for safety behavior. In turn, this situation may reduce accidents and injuries because it (1) promotes safety behaviors and (2) provides less of an opportunity for workers' personality to influence their behavior. In other words, employees with more careless or lackadaisical traits (e.g., low in conscientiousness) may be urged to comply with norms or risk being fired—so they follow the norms, perhaps begrudgingly. In general, their attitudes and behavior are a function of the strength of the situation.[154] Second, jobs with myriad rules and tightly controlled processes can be dull or demotivating. Imagine that all work was executed with an assembly-line approach. Some people may prefer the routine, but many prefer having some variety and freedom. Third, strong situations might suppress the innovation prized by some organizations or that is needed to be successful in creative occupations.

Interestingly, when organizations tightly control processes that demotivate, suppress innovation, or block employees' preferred way of doing things, sometimes *other* personality traits will shine through even though the situation is strong.[155] As an example, say your supervisor establishes a policy to stop you and your coworkers from accomplishing a task using a very easy method. Now, your job has become harder and limited the extent to which your conscientiousness can "shine through." In response, another trait might come through despite the situations' strength. For example, now your disagreeableness might lead you to engage in CWBs, like purposefully ignoring the policy or shirking your responsibilities because you are angry about the policy change and the strong situation.

In sum, managers need to recognize the role of situation strength in the workplace and find the appropriate balance.

Trait Activation Theory

trait activation theory (TAT) A theory that predicts that some situations, events, or interventions "activate" a trait more than others.

Another important theoretical framework toward understanding personality and situations is **trait activation theory (TAT)**. TAT predicts that some situations, events, or interventions "activate" a trait more than others. Using TAT, we can foresee which jobs suit certain personalities. For example, a commission-based compensation plan would likely activate extroversion because extroverted people are more reward-sensitive, than, say, open people. Conversely, in jobs that encourage creativity, differences in openness may better predict desired behavior than differences in extroversion. See Exhibit 5-4 for specific examples.

TAT also applies to personality tendencies. For example, people learning online respond differently when their behavior is being electronically monitored. Those who had a high fear of failure had higher apprehension from the monitoring than others and learned significantly less. In this case, a feature of the environment (electronic monitoring) activated a trait (fear of failing), and the combination of the two meant lowered job performance.[156] TAT can also work in a positive way. One study found that when your coworkers are supportive, conscientious personality traits are activated so that you have a stronger sense of duty toward your fellow coworkers and, in turn, are more likely to share information with them when conflicted about whether to do so.[157]

Exhibit 5-4 Trait Activation Theory: Jobs in Which Certain Big Five Traits Are More Relevant

Detail Orientation Required	Social Skills Required	Competitive Work	Innovation Required	Dealing with Angry People	Time Pressure (Deadlines)
Jobs scoring high (the traits listed here should predict behavior in these jobs)					
Air traffic controller	Clergy	Coach/scout	Actor	Correctional officer	Broadcast news analyst
Accountant	Therapist	Financial manager	Systems analyst	Telemarketer	Editor
Legal secretary	Concierge	Sales representative	Advertising writer	Flight attendant	Airline pilot
Jobs scoring low (the traits listed here should not predict behavior in these jobs)					
Forester	Software engineer	Postal clerk	Court reporter	Composer	Skincare specialist
Masseuse	Pump operator	Historian	Archivist	Biologist	Mathematician
Model	Broadcast technician	Nuclear reactor operator	Medical technician	Statistician	Fitness trainer
Jobs that score high activate these traits (make them more relevant to predicting behavior)					
Conscientiousness (+)	Extroversion (+) Agreeableness (+)	Extroversion (+) Agreeableness (–)	Openness (+)	Extroversion (+) Agreeableness (+) Emotional Stability (+)	Conscientiousness (+) Emotional Stability (+)

Note: A plus (+) sign means that individuals who score high on this trait should do better in this job. A minus (–) sign means that individuals who score low on this trait should do better in this job.

Together, situation strength and trait activation theories show that the classic debate over nature versus nurture might best be framed as nature *and* nurture. Not only does each affect behavior, but they interact with one another. Put another way, personality and the situation both affect work behavior, but when the situation is right, the power of personality to predict behavior is even higher.[158] In the next sections, we move beyond a discussion of personality toward two other important individual differences for OB: ability and values.

Ability

5-6 Demonstrate the relevance of intellectual and physical abilities to OB.

Regardless of how motivated you are, you may not be able to act as well as Denzel Washington, vault as well as Simone Biles, or write as well as Amanda Gorman. Of course, all of us have strengths and weaknesses that make us relatively superior or inferior to others in performing certain tasks or activities. From management's standpoint, the challenge is to understand the differences and thus increase the likelihood that a given employee will perform the job well. Applicants and employees, then, should market their abilities and develop skills to be successful in the jobs they want.

What does *ability* mean? As we use the term, **ability** is an individual's current capacity to perform the various tasks in a job. Overall abilities are essentially made up of two sets of factors: intellectual and physical.

ability An individual's capacity to perform the various tasks in a job.

Intellectual Abilities

Intellectual abilities are abilities needed to perform mental activities—thinking, reasoning, and problem solving. Most societies place a high value on intelligence, and for good reason. Smart people are generally better performers, earn more money, are promoted more often, and attain higher-level jobs.[159] Jobs differ in the demands they place on intellectual abilities. Research consistently indicates a correspondence between ability and job performance, especially for complex jobs and tasks. Where employee tasks are highly routine and there are few or no opportunities to exercise discretion, a high intelligence quotient (IQ)

intellectual abilities The capacity to do mental activities—thinking, reasoning, and problem solving.

is not as important to performing well.[160] While intelligence (especially when combined with motivation, discussed later in the text)[161] is a huge benefit to performing a job well, it does not make people happier or more satisfied with their jobs.[162] In fact, research suggests that those with higher cognitive ability and who are high performers in the workplace might be victimized, bullied, and mistreated by their peers due to envy and social comparison.[163]

Assessing and measuring intellectual ability are not always simple, partially because people are not consistently capable of correctly assessing their own intellectual abilities.[164] IQ tests are designed to ascertain a person's general intellectual abilities, but the origins, influence factors, and testing of (IQ) are controversial.[165] So, too, are popular college admission tests, such as the SAT and ACT, and graduate admission tests in business (GMAT), law (LSAT), and medicine (MCAT). The firms that produce these tests do not claim that they assess intelligence, but experts confirm that they do.[166] Many organizations use intelligence tests in hiring decisions; for example, if you want to be a professional football player in the NFL, you will have to take an intellectual abilities test![167]

Dimensions of Intellectual Ability The seven most frequently cited dimensions making up intellectual ability are number aptitude, verbal comprehension, perceptual speed, inductive reasoning, deductive reasoning, spatial visualization, and memory.[168] Exhibit 5-5 describes these dimensions. These dimensions are positively correlated, so if you score high on verbal comprehension, for example, you are also more likely to score high on spatial visualization. The correlations are high enough that researchers also recognize that intelligence takes on an overall, global form as **general mental ability (GMA)**.[169]

general mental ability (GMA) An overall factor of intelligence, as suggested by the positive correlations among specific intellectual ability dimensions.

Evidence supports the idea that the structures and measures of intellectual abilities generalize across cultures: GMA was found in 73.2 percent of countries in one study of more than 50,000 individuals.[170] Someone in Venezuela or Sudan, for instance, does not have a different set of mental abilities than an American or Czech individual. There is some evidence that IQ scores vary to

Exhibit 5-5 Dimensions of Intellectual Ability

Dimension	Description	Job Example
Number aptitude	Ability to do speedy and accurate arithmetic	Accountant: Computing the sales tax on a set of items
Verbal comprehension	Ability to understand what is read or heard and the relationship of words to each other	Plant manager: Following corporate policies on hiring
Perceptual speed	Ability to identify visual similarities and differences quickly and accurately	Fire investigator: Identifying clues to support a charge of arson
Inductive reasoning	Ability to identify a logical sequence in a problem and then solve the problem	Market researcher: Forecasting demand for a product in the next time period
Deductive reasoning	Ability to use logic and assess the implications of an argument	Supervisor: Choosing between two different suggestions offered by employees
Spatial visualization	Ability to imagine how an object would look if its position in space were changed	Interior decorator: Redecorating an office
Memory	Ability to retain and recall past experiences	Salesperson: Remembering the names of customers

some degree across cultures, but this gap is decreasing year by year, and those differences become much smaller when we consider educational and economic differences.[171]

The Wonderlic Ability Test It might surprise you that the intelligence test most widely used in hiring decisions, the Wonderlic Ability Test, takes only twelve minutes to complete. There are different forms of the test, but each has fifty questions and the same general construct. Here are two questions to try:

- When rope is selling at $0.10 a foot, how many feet can you buy for $0.60?
- Assume the first two statements below are true. Is the final one true, false, or not certain?

  a. The boy plays baseball.
  b. All baseball players wear hats.
  c. The boy wears a hat.

The Wonderlic measures both speed (almost nobody has time to answer every question) and power (the questions get harder as you go along), so the average score is quite low—about twenty-one out of fifty. Because the Wonderlic can provide valid information cheaply, many organizations use it in hiring decisions, including Aveda, Duracell, Subway, and U-Haul.[172] Most of these companies do not give up other hiring tools, such as application forms or interviews. Rather, they add the Wonderlic for its ability to provide valid data on applicants' intelligence levels.

Regardless of the test used, evidence suggests that using intellectual abilities tests in hiring or other HR practices may lead to disparate impact in organizations (see the chapter on diversity).[173] Managers should exercise caution in implementing intellectual ability tests for HR purposes (e.g., hiring) and should actively monitor whether the test is excluding members from underrepresented groups or protected classes.

Physical Abilities

Though the changing nature of work suggests that intellectual abilities are increasingly important for many jobs, **physical abilities** have been and will remain valuable. Research on hundreds of jobs has identified nine basic abilities needed in the performance of physical tasks.[174] These are described in Exhibit 5-6. High employee performance is likely to be achieved when the extent to which a job requires each of the nine abilities matches the abilities of employees in that job.[175] For example, certain occupations might require more strength than others (e.g., firefighting); as such, measures of physical ability predict long-term firefighter performance in these occupations.[176] Problems with discrimination can occur, however, when using physical abilities tests, as men tend to score substantially better than women on these tests. To some degree, one can improve the extent to which women meet minimum qualifications through physical fitness training.[177] If a job you are seeking employment in requires strength, flexibility, or other physical requirements, it might be best to train to ensure you are sufficiently prepared.

physical abilities The capacity to do tasks that demand stamina, dexterity, strength, and similar characteristics.

In sum, ability-related individual differences are important in a number of types of jobs and occupations (e.g., jobs that require complex tasks or physical prowess). At the same time, organizations are increasingly aware that an optimally productive workforce includes all types of people and does not automatically exclude anyone based on broad categories of abilities. Managers should be careful using ability measures for HR purposes unless the ability measured is absolutely required for the job. Of course,

Exhibit 5-6 Nine Basic Physical Abilities

Strength Factors	
1. Dynamic strength	Ability to exert muscular force repeatedly or continuously over time
2. Trunk strength	Ability to exert muscular strength using the trunk (particularly abdominal) muscles
3. Static strength	Ability to exert force against external objects
4. Explosive strength	Ability to expend a maximum of energy in one or a series of explosive acts
Flexibility Factors	
5. Extent flexibility	Ability to move the trunk and back muscles as far as possible
6. Dynamic flexibility	Ability to make rapid, repeated flexing movements
Other Factors	
7. Body coordination	Ability to coordinate the simultaneous actions of different parts of the body
8. Balance	Ability to maintain equilibrium despite forces pulling off balance
9. Stamina	Ability to continue maximum effort requiring prolonged effort over time

simultaneously aspiring toward diversity yet realizing the predictive benefits of individual differences assessments takes skill and should be a part of any organization's diversity management strategies (see the chapter on diversity).

Having discussed abilities as an individual difference, we now turn to values. Values are often very specific and describe belief systems rather than behavioral tendencies. Some beliefs or values reflect a person's cultural background (see the chapter on diversity for an in-depth explanation), whereas other values reflect personality. However, as we will learn in the next section, we do not always act consistently with our values.

Values

5-7 Contrast terminal and instrumental values.

At the heart of all organizations lie a set of values that are central to their mission. Wells Fargo, for instance, values "what's right for customers" and states that it places "customers at the center of everything we do. We want to exceed customer expectations and build relationships that last a lifetime."[178] However, sometimes the values or behaviors of the people who make up organizations do not match the values they espouse. For example, employees of Wells Fargo, the same organization that values "what's right for customers," opened millions of fake accounts, moved money into these accounts, and signed customers up for online banking without their consent to meet sales goals—opening the company up to legal troubles.[179]

values Basic convictions that some actions and outcomes are more morally, socially, or personally preferable than others.

Values represent relatively stable and enduring,[180] basic convictions that some actions and outcomes are more morally, socially, or personally preferable than others.[181] Values contain a judgmental element because they carry an individual's ideas about what is right, good, or desirable. They have both content and intensity attributes. The content attribute says a mode of conduct or end-state of existence is *important*. The intensity attribute specifies *how important* it is. When a person ranks their values in terms of intensity, we get an idea of that person's **value system**. We all have a hierarchy of values according to the relative importance we assign to values such as freedom, pleasure, self-respect, honesty, obedience, and equality. Values lay the foundation for understanding attitudes and motivation, and they influence our perceptions. We enter an organization with preconceived notions of what "ought" and "ought not" to be. These notions contain our interpretations of right and

value system A hierarchy based on a ranking of an individual's values in terms of their intensity.

wrong and our preferences for certain behaviors or outcomes. Regardless of whether they clarify or bias our judgment, our values influence our attitudes and behaviors at work.

Many of the values we hold are established in our early years—by parents, teachers, friends, and others.[182] If we question our values, they may change, but more often they are reinforced. There is also evidence linking personality to values, implying our values may be partly determined by our personality traits.[183] Open people, for example, value pursuing new ideas (e.g., trying a new sales strategy rather than exercising restraint), while agreeable people may place a greater value on caring for others and cooperating (e.g., being attracted to a collaborative rather than competitive work environment).[184]

While values can sometimes augment decision making, at times they can cloud objectivity and rationality.[185] Suppose you enter an organization with the view that allocating pay based on performance is right while allocating pay based on seniority is wrong. How will you react if you find the organization you have just joined rewards seniority and not performance? You are likely to be disappointed—this can lead to job dissatisfaction and a decision not to exert a high level of effort because "It's probably not going to lead to more money anyway." Would your attitudes and behavior be different if your values aligned with the organization's pay policies? Most likely.

Terminal Versus Instrumental Values

How can we organize values? One researcher—Milton Rokeach—argued that we can separate them into two categories.[186] One set, called **terminal values**, refers to desirable end-states. These are the goals a person would like to achieve during a lifetime. The other set, called **instrumental values**, refers to preferable modes of behavior, or means of achieving the terminal values. Some examples of terminal values are prosperity and economic success, freedom, health and well-being, world peace, and meaning in life. Examples of instrumental values are autonomy and self-reliance, personal discipline, kindness, and goal-orientation. Each of us places value on both the ends (terminal values) and the means (instrumental values).

terminal values Desirable end-states of existence; the goals a person would like to achieve during their lifetime.

instrumental values Preferable modes of behavior or means of achieving one's terminal values.

Building upon Rokeach's value theory, Shalom Schwartz organized Rokeach's values into ten dimensions: achievement, hedonism, stimulation, self-direction, universalism, benevolence, tradition, conformity, security, and power.[187] Schwartz provided evidence across twenty separate countries for this framework of values.[188] Perhaps it is easy to see how some of these values are directly relevant to people in organizations, with some (e.g., universalism, benevolence, etc.) promoting effectiveness and treating others well, while others can cling to what is typically done (e.g., tradition, conformity, and security) or value self-enhancement (e.g., power and achievement). Perhaps Wells Fargo, although valuing benevolence toward customers, was composed of employees who personally valued self-enhancement.

Generational Values

Researchers have integrated several analyses of work values into groups that attempt to capture the shared views of different cohorts or generations in the U.S. workforce.[189] You will surely be familiar with the labels—for example, baby boomers, Gen Xers, millennials, Gen Zers—some of which are used internationally. Exhibit 5-7 segments employees by the era during which they entered the workforce.[190]

Though it is fascinating to think about generational values, remember that these classifications lack solid research support. Early research was plagued by methodological problems that made it difficult to assess whether differences exist. Reviews suggest many of the generalizations are either overblown or incorrect.[191] Differences across generations often do not support popular conceptions of how generations differ. For example, the value placed on leisure has increased over generations from the baby boomers to the millennials, and work centrality has declined, but research did not find that millennials had more altruistic work values.[192] Also, research has failed to support that baby boomers have a higher work ethic than other generations.[193] Another modern criticism of millennials is that they are entitled and remnants of the "participation trophy" generation;[194] however, one study of more than ten thousand people suggests that there are no differences between generations in entitlement. Furthermore, generational research criticisms aside, this study suggested that baby boomers are the ones who tend to become more entitled as they age![195]

Another study tried to uncover whether major events (e.g., the Social Reform era in China) influenced the values of later generations.[196] If generational differences are real, one would expect major, value-defining events to lead to changes in generational values over time for the affected generation. In this study, generational values were largely similar before, during, and after China's Social Reform. Interestingly, *all generations* experienced increasing openness to change as a result of the Reform.[197] As such, perhaps major events do not affect specific generations, as many claim (e.g., the Vietnam War's influence on boomers, the dot-com boom on Gen Xers, the Great Recession on millennials). Instead, maybe these events affect all people who were alive at the time in similar ways.

Despite the lack of support for the validity of generational values, support has been provided for differences in how people *perceive* those of other generations—in the workplace, people place others into generational categories and apply stereotypes that affect workplace decisions.[198] Although there is little validity to generational differences, nevertheless, these differences are still perpetuated as stereotypes that are often applied in the workplace, which can result in ageist or discriminatory climates (see the chapter on diversity) if left unchecked.[199]

Exhibit 5-7 Dominant Generational Work Values in Today's Workforce

Generational Cohort	Born	Entered the Workforce	Dominant Work Values
Baby Boomers	1946–1964	1961–1979	Optimism, Competition, Hard Work, Teamwork, Loyalty, Duty
Generation Xers	1965–1980	1980–1995	Flexibility, Informality, Skepticism, Independence, Diversity, Work-Life Balance, Self-Enhancement
Millennials	1981–2000	1996–2015	Competition, Open-mindedness, Achievement, Responsibility, Uniqueness, Quality Relationships
Generation Zers	2001–2020	2015 to present	Multiculturalism, Diversity, Entrepreneurship, Progressiveness, Ambidexterity, Personalization, Individuality, Creativity, and Innovation

Source: Based on Purdue Global, *Generational Differences in the Workplace,* accessed February 18, 2021, https://www.purdueglobal.edu/education-partnerships/generational-workforce-differences-infographic/

Summary

Personality and individual differences matter to organizational behavior. They are critically important because the fit between people and their jobs, organizations, supervisors, and groups affects employee job attitudes, performance, and intentions to quit. In this chapter, we discussed personality and two individual differences highly relevant to OB (e.g., abilities and values). The Big Five has been a significant advancement, though the Dark Triad and other traits (i.e., proactive personality) matter as well. Emerging theory and research reveal how personality matters more in some situations than others. Every trait and individual difference has advantages and disadvantages for work attitudes and behavior. There is no perfect constellation of characteristics that is ideal in every situation. Personality and individual differences can help you understand why people (including yourself!) act, think, and feel the way they do. Astute managers and employees can put that understanding to use by placing themselves (and assisting others in placing themselves) in situations that best fit their personalities.

Implications for Managers

- Evaluate jobs, workgroups, and your organization to determine the optimal value, interest, and personality fit with employees.
- Consider screening job candidates for the personality traits that are most relevant to your organization's values (e.g., conscientiousness, extroversion) and the requirements most important for success in the job.
- Although many personality frameworks exist, there are striking differences in evidence and empirical support across measures. Based on these findings, managers should critically evaluate personality frameworks and the instruments used to measure them before making substantive decisions based on their results. We recommend the Big Five as this is the most widely supported personality framework to date.
- Although some personality traits are more suitable for predicting job performance while on the job, other personality traits can predict how well employees do in training and onboarding. Employees with certain traits may do better with additional support and guidance to prevent early turnover and contribute to their career development.
- Consider situational factors when evaluating observable personality traits. Policies, practices, and even events can make situations strong or weak or elicit the display of (un)desired personality traits. Attempt to modify the situation to encourage or dissuade certain behaviors, but recognize that this can sometimes have unintended effects.
- Although abilities are often the best predictors of job performance outside of proving that one can directly do the job, they tend to be wrought with disparate impact concerns. Exercise caution in assessing applicants and candidates for ability unless intellectual or physical abilities are necessary and required for the job.
- Resist the temptation to group coworkers and employees into generational categories—the evidence suggests that these differences are not very compelling. Furthermore, these generational categories can lead to harmful stereotyping and potentially to disparate impact or treatment toward employees from protected age classes.

Millennials Are More Narcissistic Than Other Generations

POINT

Millennials have some great virtues: As a group, they are technologically savvy, socially tolerant, and engaged. They value their quality of life as equal to their career, seeking a balance between home and work. In these ways, millennials surpass baby boomers, who are less technologically adept, less tolerant, and who have a history of striving to get ahead at all costs. However, millennials have a big Achilles' heel—they are more narcissistic.

Several large-scale, longitudinal studies found that millennials are more likely than baby boomers to have seemingly inflated views of themselves, and psychologists have found that narcissism has been growing since the early 1980s. More millennials rate themselves as above average on attributes such as academic ability, leadership, public speaking ability, and writing ability. Millennials are also more likely to agree they would be "very good" spouses (56 percent, compared to 37 percent among 1980 graduates), parents (54 percent; 36 percent for 1980 graduates), and workers (65 percent; 49 percent for 1980 graduates).

Cliff Zukin, a senior faculty fellow at Rutgers University, believes the reason is in the childhood upbringing of millennials. "This is the most affirmed generation in history," Zukin said. "They were raised believing they could do anything they wanted to, and that they have skills and talents to bring to a job setting." Jean M. Twenge, author of *Generation Me*, agrees. "People were not saying, 'Believe in yourself' and 'You are special' in the '60s."

Narcissism is bad for society and particularly bad for the workplace. "[Narcissists] tend to be very self-absorbed; they value fun in their personal and their work life," one administrator said. "I can't expect them to work on one project for any amount of time without getting bored."

COUNTERPOINT

Wasn't "the Me Generation" generations ago? Honestly, every generation thinks they are better than the ones that come after! "You can find complaints [about the younger generation] in Greek literature, in the Bible," Professor Cappelli of the Wharton School observed. "There's no evidence Millennials are different. They're just younger." What *is* universally true is that young people share certain characteristics… *because* they are young.

A recent study shows the similarity between how millennials and baby boomers thought about themselves at the same stage of life. As college freshmen, 71 percent of millennials thought they were above average academically, and 63 percent of baby boomers thought the same thing when they were college freshmen. Similarly, 77 percent of millennials believed they were above average in the drive to achieve, versus 68 percent for baby boomers. In other words, "Every generation is Generation Me."

In some ways, millennials may be less narcissistic than baby boomers today. As one manager observed, "[Millennials] don't have that line between work and home that used to exist, so they're doing Facebook for the company at night, on Saturday or Sunday. We get incredible productivity out of them." Millennials also may be more altruistic. For example, 29 percent of millennials believe individuals have a responsibility to remain involved in issues and causes for the good of all, while only 24 percent of baby boomers feel the same level of responsibility.

Rather than comparing different generations, it is more accurate to compare people at one life stage with others at the same life stage. Research supports that younger people do tend to be more narcissistic than those in later life stages. Millennials are no more narcissistic than baby boomers were in their youth.[200]

CHAPTER REVIEW

QUESTIONS FOR REVIEW

5-1 What are the differences between person–job fit and person–organization fit?

5-2 What is personality? How do we typically measure it? What factors determine personality?

5-3 What are the strengths and weaknesses of the Myers-Briggs Type Indicator (MBTI), the Big Five personality model, and the Dark Triad?

5-4 How do the concepts of core self-evaluation (CSE), self-monitoring, and proactive personality help us understand personality?

5-5 How does the situation affect the degree to which personality predicts behavior?

5-6 How are intellectual and physical abilities relevant to OB?

5-7 What is the difference between terminal and instrumental values?

APPLICATION AND EMPLOYABILITY

An insight into your individual differences and an understanding of how these are important in the workplace can help you improve your employability skills. First, the workplace is a complex system filled with many interacting people. By understanding how people have different personalities, abilities, and values, you will be better able to anticipate conflict and avoid personality or value clashes. Many organizations measure and assess personality. Therefore, understanding your own personality can help your career. You can discover your personality strengths, use your personality insights to become more employable, and know what to focus on during your job search. Conversely, understanding how the situation either constrains or activates these behavioral traits or tendencies is also essential for becoming more adaptable in the workplace. This knowledge can help you make better decisions in deciding which companies you would like to work for and understanding how you fit with the culture in these organizations.

In this chapter, you developed your critical thinking and self-management skills by finding out how personalities can be accurately judged within seconds after meeting someone, gaining insight into personality traits that can predict unethical behavior, and debating whether millennials are more narcissistic than other generations. In the next section, you will develop your communication and leadership skills by exploring self-management processes in job interviews, questioning the ethics of working for organizations where you think you may not be the best fit, and critically evaluating the use of a personality assessment in a large technology company.

EXPERIENTIAL EXERCISE Acing the Interview

You have been assigned to the role of a job candidate or interviewer. If you are assigned to the role of the job candidate, you will be assigned to read either "Job Candidate Role Description 1" or "Job Candidate Role Description 2." It is vital that you read *only* your assigned role description. Take ten minutes to individually read your role description and prepare for the role-play exercise. Then you will have ten minutes to engage in the exercise. Lastly, together with your partner, answer the debrief questions.

Interviewer Role Description: Your task is to conduct a brief ten-minute interview. You are seeking a new team member as the hiring manager at a supermarket chain. The team member's primary job duties include working the sales floor, answering questions about services and merchandise, stocking shelves, and organizing displays. You are seeking a proactive and conscientious employee who values hard work. The ideal candidate would be friendly, motivated, someone with customer service experience, and an individual who is passionate about natural foods and healthy living. Now prepare five questions that you will ask the job candidate to determine if their personality and values would fit both the position and the organization.

Job Candidate Role Description 1: You are interviewing for a team member position at a supermarket chain. Your primary job duties include working the sales floor, answering questions about services and merchandise, stocking shelves, and organizing displays.

Job Candidate Role Description 2: You are interviewing for a team member position at a supermarket chain. Your primary job duties include working the sales floor, answering questions about services and merchandise, stocking shelves, and organizing displays.

The company is seeking a proactive and conscientious employee who values hard work. The ideal candidate would be friendly, motivated, someone with customer service experience, and an individual who is passionate about natural foods and healthy living.

Questions

5-8. Did you find you were presenting your personality and values authentically? If you were the interviewer, was your partner presenting themselves authentically during the interview? Why or why not?

5-9. Do you believe that it is unethical to misrepresent your true personality or values during an interview? Why or why not?

5-10. How important are a job candidate's personality and values when considering whether to hire them?

5-11. As the interviewer, how did you decide which questions to ask the job candidate? As the interviewer and job candidate, do you believe these questions did a good job of capturing the candidate's personality and values? Why or why not?

ETHICAL DILEMMA How Long Should You Wait Before Deciding If a Job Is Not a Good Fit?

You have been looking for a job for a month and are not much closer to finding your dream job. However, you recently interviewed with a company, and after going through several rounds of interviews, the company informed you that it is between you and another candidate. You will be informed of their decision in a few days. Truthfully, you are not particularly interested in the position. Still, you have not received any other job offers, so you decide to wait to see if you are offered the position.

After a few days have passed, you are eventually offered the position. But you are still questioning if you should accept the offer. You were hoping for a higher-level position with a higher salary. Although you would be financially able to support yourself without a job for a few more months, you worry that not having a job may hurt your chances of securing your ideal job. Ultimately you decide to accept the position despite your reservations.

Although you are relieved when you accept the position, as you begin the orientation and training process, you soon realize that this job carries more responsibility than you anticipated. You hoped that it would be a job where you could get by doing a minimal amount of work, and in the meantime, you could apply for other jobs. Perhaps you should not have taken the job so that you could have devoted more time and energy to finding a job that was a good fit. However, you are learning skills that will likely be useful in the future and help you advance within your field.

Questions

5-12. Are there ethical implications for accepting a job that you are not serious about committing to long-term?

5-13. Before accepting the position, are you obligated to let the employer know your true intentions? Why or why not?

5-14. Are there any circumstances under which it would be acceptable to take a position even if you cannot commit to staying in the position long-term?

5-15. Should you wait before deciding if the job is not a good fit for you once on the job? Why or why not? What are the ethical implications for deciding later rather than earlier?

CASE INCIDENT Sky Energy

Sky Energy (often referred to as just "Sky") is a large technology company with 45,000 employees located in San Jose, California. The company focuses on developing clean energy, primarily manufacturing electric vehicles as well as solar and wind technology. Sky was founded in 2003 by two engineers, one of whom is the current CEO, Eduardo Malaga. Malaga is known for his innovative thinking and is continually seeking to develop new products that promote clean energy.

Malaga's entrepreneurial spirit has a strong influence not only on the products that the company develops but also on the organizational structure of Sky Energy. Malaga has a vision for creating more of a team structure with less hierarchy and more collaboration on projects. As Malaga considers strategies for developing effective teams, he thinks about the potential obstacles that employees may face as they are frequently required to work closely with others. From personal experience, he knows that managing and working with different personalities can be challenging. One day he remembers a nifty personality test, the Myers-Briggs Type Indicator (MBTI), that he took earlier in his career. Malaga found learning about his "type" really enjoyable and useful in understanding how he interacted with others at work. His belief that he has stumbled on the perfect tool to facilitate the team structure is further reinforced as he does some more research on the MBTI. For instance, the company that sells the MBTI suggests that the assessment is valid and reliable based on data it has collected. Furthermore, Malaga is confident that it would not create division in the work teams even though the assessment would classify each team member as belonging to a certain type. As the MBTI website says, "All types are equal."

Although Sky Energy is by most standards remarkably successful, Malaga knows that the companies that sustain long-term success are those that continue to innovate. He remembers how Facebook overtook Myspace, and that is just one of many examples. After doing his research, Malaga is ready to hit the ground running using the MBTI at Sky. He plans to administer the MBTI to all current employees and have project managers use the data to create project teams. Malaga also plans to use it as a pre-employment assessment. Sky is focused on selecting individuals who can be developed and will stay with the company long-term. As such, Malaga believes it is more important to find "coachable" people who fit with the

company's values and philosophy rather than those with specific qualifications or experience. Soon hiring managers and recruiters are trained in administering and evaluating the MBTI.

For example, as the hiring team is deciding between two final candidates (Carson and Zara) for a software engineer position, they are faced with a difficult decision as to which candidate to hire. While Zara has less experience than Carson, during the interview, Zara was more enthusiastic about the company's mission. She emphatically highlighted how a previous internship at an organization dedicated to environmental activism would make her a great candidate for the position. Furthermore, Zara's MBTI type was an ENTJ (Extroversion + Intuition + Thinking + Judging), while Carson was an ISFJ (Introversion + Sensing + Feeling + Judging). From Carson's interview, it was clear that he was reliable, hard-working, and practical, as his type indicated. Although the hiring staff believed these traits would be beneficial, they noted that a slight majority of the current employees' types included introversion. Not only was Zara an extrovert, but her type also indicated that she was vision-focused and would assume leadership without hesitation. Carson (as an ISFJ) would most likely lack the leadership qualities Sky was looking for in its new hires. In the end, the hiring staff decided that Zara would bring diversity to the teams she would be working on. Given her prior experience and MBTI type, she would be a better match to carry out the company's vision.

Malaga also noted how the MBTI could strengthen teams by ensuring they were diverse in their MBTI types. One of the hiring managers noted that the Big Five Model could be used instead because it also measures extroversion and introversion. While a few of the managers agreed, the team ultimately decided to stick with the MBTI as the tool's use was clearly part of Malaga's vision for the company.

Questions

5-16. After reading the case, what are your thoughts on the MBTI? Why do you think management at Sky responded so favorably to the MBTI? Do you think they would respond differently or change their ways if they knew the lack of empirical evidence for the MBTI? Why or why not?

5-17. Is there another personality framework that would have been more effective in achieving Malaga's goals? If so, why do you think this framework would have been more effective? If you were a hiring manager on the team at Sky, what would you suggest to the rest of your team, and how would you convince them to go with your idea?

5-18. Evaluate the hiring staff's decision-making process for hiring a new software engineer. To what extent should the individual's personality traits factor into the decision-making process? How should the organization use the personality data to make decisions?

6 Perception and Individual Decision Making



Source: David Lyon/Alamy Stock Photo

LEARNING OBJECTIVES

After studying this chapter, you should be able to:

- **6-1** Explain the factors that influence perception.
- **6-2** Describe attribution theory.
- **6-3** Explain the link between perception and decision making.
- **6-4** Contrast the rational model of decision making with bounded rationality and intuition.
- **6-5** Explain how individual differences and organizational constraints affect decision making.
- **6-6** Contrast the three ethical decision criteria.
- **6-7** Describe the three-stage model of creativity.

Employability Skills Matrix (ESM)

	Myth or Science?	An Ethical Choice	Point/ Counterpoint	Toward a Better World	Experiential Exercise	Ethical Dilemma	Case Incident
Critical Thinking & Creativity	✓	✓	✓	✓	✓	✓	✓
Communication				✓	✓		✓
Collaboration					✓		✓
Self-Management	✓	✓		✓		✓	
Social Responsibility	✓	✓		✓	✓	✓	✓
Leadership		✓	✓	✓	✓	✓	✓
Career Management	✓					✓	

INDIVIDUAL INTUITION IGNITING INNOVATION

Richard Branson, Sir James Dyson, and Ella Woodward are three entrepreneurs and very successful business owners operating in completely different industries, but they have one thing in common—a strong, innovative, entrepreneurial intuition. Richard Branson, the English business tycoon, investor, and philanthropist; Sir James Dyson, the British inventor, industrial designer, and founder of the Dual Cyclone bagless vacuum cleaner; and Ella Woodward, the English food writer and founder of the brand Deliciously Ella, have all made key business decisions based on their intuition and "gut feeling," leading to innovative, creative market offerings that ultimately resulted in successful business ventures and strong brand names within the United Kingdom as well as the global marketplace. Richard Branson has admitted to making decisions based on creative instinct, James Dyson has confessed to trusting intuition based on market research, and Ella Woodward has drawn on her emotions and drive in response to a diagnosis of postural tachycardia syndrome to make decisions.

Of course, their business ventures' successes have not been the outcome solely of the entrepreneurs' intuitive decision-making; sound analytical skills and well-informed judgment have played a major role as well. Dyson's decision-making has been based on his knowledge of and expertise in the technology, Branson's is based on his knowledge of the market, and Woodward's is based on her knowledge of the targeted consumer. Decision making is a complex task and process, particularly in a corporate environment, as it requires and engages both intuition (and therefore affective reasoning) as well as rationalized

judgments. The two aspects work in a symbiotic manner, but differently from one individual to another.

Intuition has often been on their side, but not always. Consider, for example, the case of Virgin Cola. In 1994, Virgin Group founder Richard Branson was looking to broaden Virgin's offerings and to bring a rival to Coca-Cola and Pepsi brands. After numerous ups and (mainly) downs, Virgin Drinks U.S.A., the company dealing with Virgin Cola's U.S. market, closed in April 2001, having managed to establish a measly 0.5 percent share of the market by volume. In 2012, the production of Virgin Cola was ceased entirely, and no company acquired the UK Virgin Cola licence in its place.

The hope was to take over Coca-Cola and Pepsi's market shares and even dominate the soft drinks market, but the actual facts revealed a failure in the product, which some attribute to a lack of market research and market knowledge and even misinterpretation of consumer behavior. Others argue that this could have been a result of what is known as bounded rationality, which involves oversimplifying a decision that was complex at that time. Still others state that it was simply a case of bad judgment in the first place. Wherever the truth lies, Branson is not deterred from taking risks or venturing into the unknown; he continues to be intrigued and inspirited by them. And these traits have made him the business magnate he is.[1]

As we will see later in the chapter, the appropriateness, ethicality, and creativity inherent in decision making have a number of implications in the workplace. However, our decision making is only as good as our perceptions, and unfortunately, these can be wrought with error and bias. To better understand what influences us and our organizations, we start at the roots of our thought processes: our perceptions and the way they affect our decision making.

What Is Perception?

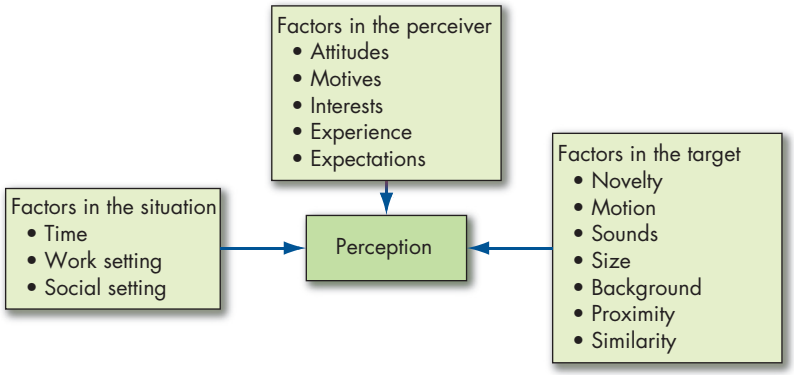
6-1 Explain the factors that influence perception.

Things are not always as they seem, and unfortunately our perceptions can lead to bias. Particularly nefarious is when we perceive another person as belonging to a certain stereotyped group; this can affect how we interact with them. We form our strongest impressions based on what we perceive about other people, including their moral character, but our initial information about this can be sketchy and unfounded.[2] For instance, weight bias and discrimination affect everyone in the office in hurtful ways by activating stereotypes reflecting laziness, meekness, or poor health.[3] **Perception** is a process by which we organize and interpret sensory impressions to give meaning to our environment. What we perceive can be substantially different from objective reality.

perception A process by which individuals organize and interpret their sensory impressions to give meaning to their environment.

Why is perception important in the study of organizational behavior (OB)? People's behavior and decisions are based on their perception of what reality is, not on reality itself. In other words, our perception becomes the reality from which we act. For instance, a Brazilian employee interacting with a Japanese employee in a virtual meeting may perceive the silence in the conversation as awkward or something negative—when silence is important and conveys good listening in some Asian cultures.[4] To understand what all of us have in common in our interpretations of reality, we need to begin with the factors that influence our perceptions.

Exhibit 6-1 Factors That Influence Perception



Factors That Influence Perception

Many factors shape and sometimes distort perception. These factors can reside in the *perceiver*, the object or *target* being perceived, or the *situation* in which the perception is made (see Exhibit 6-1).

Perceiver When you look at a target, your interpretation of what you see is influenced by your personal characteristics—attitudes, personality, motives, interests, past experiences, and expectations.[5] Indeed, people do not always see the same target in exactly the same way. Sometimes, the difference is as stark as one person saying a dress is blue and black and another saying that it is white and gold, like the viral image that circulated the Internet in 2015.[6] In some ways, we hear what we want to hear and we see what we want to see—not because it is the truth but because it conforms to our thinking.[7] For instance, research indicates that supervisors perceived employees who started work earlier in the day as more conscientious and therefore as higher performers; however, supervisors who were night owls *themselves* were less likely to make that erroneous assumption.[8]

Some perceptions created by attitudes like these can be counteracted by objective evaluations, but others can be more insidious. For instance, a perceiver's power or status influences whether they stick up for a victim of incivility in the workplace by directly confronting the perpetrator. On the other hand, if the perceiver is in a lower-status position in the organization, they are more likely to avoid the perpetrator and only step in to offer social support to the victim.[9] As another example, leaders commonly talk or write about their leadership experiences so often that it becomes difficult for them to disentangle what really happened to them from what they recall to be true.[10] This may cause leaders to rely on incorrect beliefs or actions because it fits with what they believe worked well for them. As William Maxwell once wrote, "In talking about the past, we lie with every breath we draw."[11]

Target The characteristics of the target also affect what we perceive. Because we do not look at targets in isolation, the relationship of a target to its background influences perception, as does our tendency to group close things and similar things together. We can also perceive members of any group that has clearly distinguishable characteristics as alike in other, often unrelated ways, leading to the formation of implicit stereotypes (see the chapter on diversity in organizations). These assumptions can be harmful, as when people who have criminal records are prejudged in the workplace even when the perceiver knows that they were wrongly arrested.[12]

Sometimes this can work in the target's favor, in ways that can affect organizations' bottom lines. For example, in more than ten thousand microloan transactions, the more pleasant the appearance of the customer (i.e., loan requester),

the more likely the loan was to be approved, and the quicker the approval occurred.[13] Using artificial intelligence (AI) approaches, these researchers applied machine learning techniques and were able to determine that pleasant appearance could predict loan approval with about 60 percent accuracy.[14] As another example, budding entrepreneurs benefit from the extent to which crowdfunders perceive them as passionate people. In one series of experiments, crowdfunders (e.g., using Kickstarter and Indiegogo) were more likely to admire and fund entrepreneurs they perceived to be passionate.[15] Conversely, target characteristics can also nefariously "crowd out" and positively bias what we perceive. For instance, one study of more than ten thousand employees enrolled in professional development courses demonstrated that the course evaluations were largely affected by the trainers of these courses (who made the courses fun and enjoyable)—even beyond the quality of the course content itself, which should have been the primary focus of the evaluations.[16] Based on these results, charismatic customers, leaders, entrepreneurs, and trainers can distort and sway perceptions of others.

Context Context matters too. The time at which we see an object or event can influence our attention, as can location, light, heat, or situational factors. For instance, if you invite a potential client into your office, and it is messy, they may be more likely to think you are not conscientious and that you are more disagreeable and anxious than if your office was neat.[17] The group membership of both the target and perceiver matter as well, although the group membership of the *perceiver* seems to be the most important. As a member of a team, you likely have strong norms regarding what is acceptable and unacceptable behavior. This "team context" would create a strong situation (see the chapter on personality and individual differences) that substantially affects how you perceive and rate others' performance and organizational citizenship behaviors (OCBs).[18]

People are usually not aware of the factors that influence their view of reality. In fact, people are not even that perceptive about their *own* abilities.[19] Thankfully, awareness and objective measures can reduce our perception distortions. For instance, when people are more aware of their own racial biases, they are more motivated to control their own prejudice and more attuned to perceiving their own biases.[20] Let us next consider *how* we make perceptions of others.

Person Perception: Making Judgments About Others

6-2 Describe attribution theory.

The perception concepts most relevant to OB include *person perceptions*, or the perceptions people form about each other. Many of our perceptions of others are formed by first impressions and small cues that have little supporting evidence. Let us unravel some of our other human tendencies that interfere with correct person perception, beginning with the evidence behind attribution theory.

Attribution Theory

attribution theory An attempt to explain the ways we judge people differently, depending on the meaning we attribute to a behavior, such as determining whether an individual's behavior is internally or externally caused.

When we observe people, we attempt to explain their behavior. Our perception and judgment of a person's actions are influenced by the assumptions we make about that person's state of mind.

Attribution theory tries to explain the ways we judge people differently depending on the meaning we attribute to their behavior.[21] For instance, if your coworker is late to work, you might think it was because they were lazy or partying too hard

the night before—but would you say the same if *you* were late for work (or was it just the bad traffic)? Attributions also try to explain what we do as a result of our attributions. For example, supervisors are more likely to exploit or treat subordinates poorly (e.g., making them work extra hours, giving them tedious tasks) if they judge them as being "passionate" about their work.[22] In other words, they think it is okay to make them work harder if they see them as passionate about their work (e.g., they like what they do, so they will not mind doing more!). As another example, restaurant waitstaff who are mistreated by customers (and blame the customer) may stop going above and beyond for customers, resulting in negative customer reviews and recommendations for the restaurant.[23]

Internal and External Causation Attribution theory suggests that when we observe an individual's behavior, we attempt to determine whether it was internally or externally caused. That determination depends largely on three factors: (1) distinctiveness, (2) consensus, and (3) consistency.[24] Let us clarify the differences between internal and external causation, and then we will discuss the determining factors.

Internally caused behaviors are those an observer believes to be under the personal behavioral control of another individual (e.g., coming to work late because the coworker is lazy). *Externally* caused behavior is what we imagine the situation forced the individual to do (e.g., coming to work late because of bad traffic). New research suggests that there may be another kind of external attribution, where our relationship with the other person is the reason for the behavior.[25] For example, you may think a customer stopped doing business with your company because they are (1) disloyal to the company (e.g., internal), (2) cutting expenditures due to hard financial times (e.g., external), or (3) not getting along with the new employee assigned to their account (e.g., relational).

A great deal of research is demonstrating how *relational* attributions impact interpersonal dynamics in the workplace. For instance, if you work with an exceptionally well-known performer (e.g., a star), you tend to be shielded from blame *and* credit for your contributions because others attribute your performance to your relationship with the star employee.[26] As another example, if you think your leader is only treating you and your coworkers well to keep the peace and maintain leader–follower relationships, you may feel less "special" and, as a result, engage in fewer OCBs.[27]

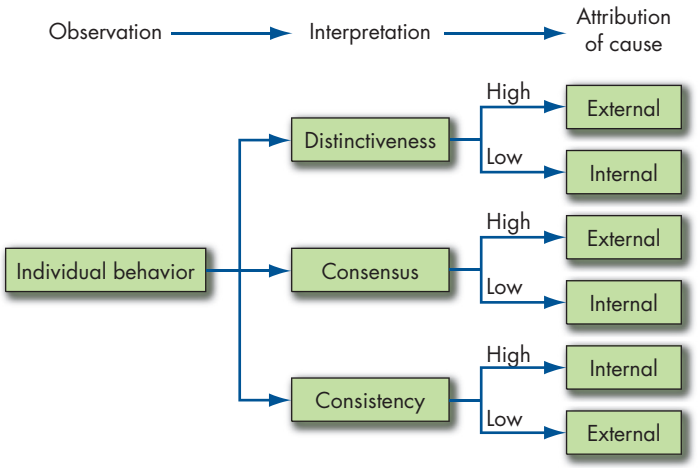
Distinctiveness, Consensus, and Consistency *Distinctiveness* refers to whether an individual displays different behavior in different situations. Is the employee who arrives late today also one who regularly "blows off" other kinds of commitments? If no, we are likely to give it an external attribution. If yes, we will probably judge the behavior to be internal.

If everyone who faces a similar situation responds in the same way, we can say the behavior shows *consensus*. Were all employees who took the same route also late? If yes, you would probably give an external attribution to the employee's tardiness (e.g., traffic or weather). If no, you would be more likely to attribute their lateness to an internal cause.

Finally, an observer looks for *consistency* in a person's actions. Does the person respond the same way over time? Coming in ten minutes late for work is not perceived the same for an employee who has not been late for several months as for an employee who is late three times a week. The more consistent the behavior, the more we are inclined to attribute it to internal causes.

Exhibit 6-2 summarizes the key elements in attribution theory described in this section. It tells us, for instance, that if an employee, Alex, generally performs at about the same level on related tasks as they do on the current task (low distinctiveness), other employees frequently perform differently—better or

Exhibit 6-2 Attribution Theory



worse—than Alex on that task (low consensus), and Alex's performance on this current task is consistent over time (high consistency), anyone judging Alex's work will likely hold them primarily responsible for their task performance (internal attribution).

Errors and Biases in Attribution When we make judgments about the behavior of other people, we tend to underestimate the influence of external factors and overestimate the influence of internal or personal factors.[28] This **fundamental attribution error** might explain why we might perceive the wealthy as intelligent, savvy, or innately effective without considering the external factors that precluded their success (e.g., being born into a wealthy family).[29]

fundamental attribution error The tendency to underestimate the influence of external factors and overestimate the influence of internal factors when making judgments about the behavior of others.

Similarly, people tend to attribute ambiguous information as relatively flattering, accept positive feedback, and reject negative feedback. This is called **self-serving bias**.[30] Although much research focuses on the self-serving bias in business leaders and their negative effects, not all executives are self-serving—many studies suggest that executives who are modest experience better career success and upward mobility, elicit positive investor reactions, and generally lead to higher team and firm performance.[31]

self-serving bias The tendency for individuals to attribute their own successes to internal factors and put the blame for failures on external factors.

The evidence on cultural differences in perception is mixed, but most suggests there are differences across cultures in the attributions people make, with collectivist cultures making external attributions more frequently than internal attributions.[32] For example, an experimental study of Chinese and American collective arbitrators (people adjudicating disputes between an employer and a group of employees) found that in similar scenarios, Chinese arbitrators tend to impose harsher penalties than their American counterparts on organizations that have violated the terms of their contracts. This difference has been attributed in part to a tendency for Chinese arbitrators to attribute responsibility for a violation to organizations and context rather than to individuals—a difference shaped by the influence of collectivist culture. This may also explain the findings of another study, based on the coverage of several well-known business scandals: American newspapers referred more to the individual involved in each scandal, whereas Japanese newspapers referred more to the institution, implying a greater focus by the Japanese on the group than on the individual as an agent.[33]

Having introduced person perception, let's consider the common shortcuts we use to simplify our processing of others' behavior.

Toward a Better World

Volkswagen: Going Green or Just Greenwashing?

Just as people make sense of their immediate world, observing coworker, supervisor, and customer behaviors to figure out their actions, people do the same with organizations. Unfortunately, many employees, managers, and executives are aware of this fact, sometimes trying to use this to their advantage. Of course, it is one thing to manage others' perceptions and put your best foot forward as a company—that's just good marketing. However, it is another thing entirely for organizations to misrepresent themselves or manipulate others' perceptions to suit their interests. In the modern cutthroat, competitive corporate world, many are doing everything they can to retain or capture market share. They do so even if it means behaving unethically through performative marketing. As Professor Burbano of the Columbia Business School notes, "These things create a demand for good environmental performance—and if you have poor environmental performance, there's a temptation to pretend that that's not the case." For instance, some organizations try to "greenwash" their practices to make them appear as engaging in socially responsible practices.

One example was a scandal that hit Volkswagen (VW), referred to by some as "Dieselgate" or the "Diesel Dupe." As a part of a major push to sell diesel-powered cars in the United States, VW engaged in a massive marketing campaign to tout its cars' (e.g., the Jetta, Beetle, Golf, Passat) low emissions. The Environmental Protection Agency (EPA) discovered that more than 11 million VW vehicles were being sold in America and Europe that did not meet the low emissions standards. However, it was not a mistake in manufacturing, a glitch, or some other unforeseen issue that caused the unmet standards. VW fitted its cars with complex software designed to provide false emission test readings. Dubbed a "defeat device," this software could detect whether it was being tested and alter its readings to improve performance on the test. When tested under controlled laboratory conditions, these cars would sense these conditions and monitor speed, engine operation, air pressure, and even steering wheel position to operate below typical performance. Once outside of these conditions, the car would switch out of this mode and operate below standards. By some estimates, these un-green engines emitted forty times the legal limit for pollutant emissions. Worse yet, this is not the first time an automobile company, let alone VW, has attempted to install these defeat devices in its automobiles. General Motors (GM) faced a similar scandal in the 1990s. VW was accused and found guilty of similar practices as early as the 1970s.

Although such actions are illegal, there is often more incentive for an organization to "take a chance" on deceptive practices than to do the right thing. The Federal Trade Commission (FTC) can issue cease-and-desist orders, prison sentences, and fines of up to $16,000 per violation. However, it is not required for companies to report corporate social responsibility (CSR) performance data, and compliance guidelines are ambiguous. Furthermore, many terms surrounding green practices are vague (e.g., how would one define "all-natural?"). When greenwashing is caught, a different set of attributional processes begin that many companies do not anticipate. Customers become aware of the company's practices and make separate attributions of their intent and worthiness of their business. In the wake of this scandal, VW America's head said, "We've totally screwed up" and "broken the trust of our customers and public." The replacement head of VW America further noted, "My most urgent task is to win back trust for the Volkswagen Group—by leaving no stone unturned."

But can companies survive the fallout after greenwashing attempts? Research makes it clear that these attributional processes play a role at all stages of this process: when customers initially view corporate CSR messaging, in the wake of a scandal and corporate apologies, and even at lower levels when viewing their supervisors' or coworkers' prosocial efforts. In other words, people harbor perceptions of others' seemingly prosocial actions and may begin to think negatively of them (e.g., as "sucking up" or "going through the motions"). For instance, one study examined customers who became aware of a product recall that a company was responsible for preventing (and had control over). These customers were more likely to blame that company, develop negative attitudes toward that company, commit to no longer purchasing the product, and even recommend legal damage payouts to those affected. On the other hand, the opposite is true when people perceive that CSR actions are genuine. As such, CSR, when done well, can still be an excellent practice for the manager, employee, and consumer advocacy of a company.[34]

Common Shortcuts in Judging Others

Shortcuts for judging others often allow us to make perceptions rapidly and provide data for making predictions. However, they can often result in significant distortions.

Selective Perception We often choose (sometimes unconsciously) the information we take in from the environment based on our background, motivations, and characteristics. This is called **selective perception**. For example, organizational leaders are motivated to focus on financial metrics and the bottom line while effectively ignoring employees and their job satisfaction, which we know from the chapter on job attitudes is important to organizational effectiveness.[35] Some research suggests that if we are directed to focus on more in our environment, we will; for example, if job satisfaction is emphasized as important by the top management team, then other managers will see it as important and will no longer ignore it.[36]

selective perception The tendency to choose to interpret what one sees based on one's interests, background, experience, and attitudes.

Halo and Horns Effects When we draw a positive impression about an individual based on a single characteristic, such as intelligence, sociability, or appearance, a **halo effect** is operating.[37] The **horns effect**, on the other hand, is when we draw a *negative* impression from a single characteristic. These effects are easy to demonstrate. Imagine a recruiter meeting with two applicants for an initial interview.[38] One was very friendly and sociable—it is easy for the recruiter to conclude that this applicant will also be clever, smart, or good at their job, even though the characteristics may be unrelated. In other words, the halo effect creates a positive, clouded first impression. The other applicant was loud and off-putting—it would be easy, again, to conclude that this applicant will not be clever, smart or good at their job. In other words, the horns effect creates a negative, clouded first impression.

halo effect The tendency to draw a positive general impression about an individual based on a single characteristic.

horns effect The tendency to draw a negative general impression about an individual based on a single characteristic.

Contrast Effects It is performance appraisal "season," and everyone in your workplace is anxious to receive their evaluation. The boss begins scheduling meetings, and you hear through the grapevine that Regan is going up first—Regan is the star performer in the office and will be a hard act to follow. Everyone in the office will probably look bad in comparison to Regan! This example demonstrates how the **contrast effect** can distort perceptions.[39] We do not evaluate a person in isolation. Our reaction is influenced by other people we have recently encountered. For example, one study examined teams in an organization that was undergoing radical change and new leader appointments. Teammates provided support toward and reacted more positively to an effective new leader when the previous leader was not very effective (i.e., a contrast effect). However, if the previous leader was effective, the new leader's behaviors mattered much less, even if what the new leader was recommending was desirable.[40]

contrast effect Evaluation of a person's characteristics that is affected by comparisons with other people recently encountered who rank higher or lower on the same characteristics.

Stereotyping We deal with our complex world's unmanageable number of stimuli by using stereotypes or shortcuts called *heuristics* to make decisions quickly. For example, it does make sense to assume that your coworker from finance will be able to help you figure out a forecasting problem. The challenge occurs when we generalize inaccurately or make irrational "leaps" based on these shortcuts. When we judge someone based on our perception of the group to which they belong, we are *stereotyping*.[41] As you may recall from our discussion earlier in the text, stereotyping is an extreme shortcut taken in organizational decision making. Stereotyping can mar business processes, like recruitment and hiring. For example, in one study, more than 6,500 U.S. professors were sent fake letters by fictitious students asking about graduate school and research opportunities—the content of these letters was all the same, except the names were changed to correspond with "stereotypically"



Nurse Li Hongfei, who works at No. 4 People's Hospital in Shenyang, China, experiences negative stereotyping based on his gender. Like Li, male nurses in many countries report that gender stereotyping generalizes inaccurately that nursing is a profession for women only because men lack the patience, empathy, and compassion required to succeed as a nurse.

Source: Zhang Wenkui Xinhua News Agency/ Newscom

Black, Chinese, Hispanic, Indian, and White names.[42] These professors tended to be significantly more responsive to White males than other students.

It should be obvious by now that our perceptions distort our outlook. These perceptions filter into several business processes, such as employment interviews and performance evaluations.

Specific Applications of Shortcuts in Organizations

People in organizations are always judging each other. Managers must appraise their employees' performances. We evaluate how much effort our coworkers are putting into their jobs. Team members immediately "size up" a new person. In many cases, our judgments have important consequences for the organization. Let's look at the most obvious applications.

Employment Interview Few people are hired without an interview. But interviewers make perceptual judgments that are often inaccurate and draw from early impressions that quickly become entrenched.[43] Research shows that we form impressions of others within a tenth of a second based on our first glance.[44] Most interviewers' decisions change very little after the first four or five minutes of an interview. Thus, information elicited early in the interview carries greater weight than does information elicited later, and a "good applicant" is probably characterized more by the absence of unfavorable characteristics than by the presence of favorable ones.[45] Our individual intuition about a job candidate is not reliable in predicting job performance, so collecting input from multiple independent evaluators can be predictive.[46]

Performance Expectations People attempt to validate their perceptions of reality even when these perceptions are faulty. The terms **self-fulfilling prophecy** and *Pygmalion effect* describe how an individual's behavior is determined by others' expectations.[47] If a manager expects big things from the team, they are not likely to let the manager down. Similarly, if the manager expects only minimal performance, the employees will likely meet those low expectations. Expectations become reality. The self-fulfilling prophecy has been found to affect the performance of students, soldiers, accountants, and a number of other occupations.[48]

self-fulfilling prophecy A situation in which an individual's behavior is determined by others' expectations, even if untrue. In other words, if someone holds misrepresented or unfounded expectations about another person, that person may make these hypothetical, unfounded expectations into a reality.

Performance Evaluations We will discuss performance evaluations more in the human resources chapter, but note that they very much depend on perceptual processes.[49] An employee's future is closely tied to their appraisal—promotion, pay raises, and continuation of employment are among the outcomes. Although the appraisal can be somewhat objective (for example, a salesperson is appraised on how many dollars of sales generated), many jobs are evaluated subjectively. Subjective evaluations, though often necessary, are problematic because of the errors we have discussed. Sometimes performance ratings say as much about the evaluator as they do about the employee!

Social Media Social media and the Internet have made it easier than ever to obtain information about other people. This imperfect window into others' lives opens the possibility of employees and managers making shortcut evaluations of others, such as applicants and candidates—sometimes without even meeting them in person. And the evaluations work both ways—customer and client evaluations of organizations (e.g., negative reviews on Twitter) can have a massive impact on organizations,[50] in some cases even leading stock analysts to make or withhold recommendations of the target companies.[51]

Within the context of recruitment and hiring, about four in every ten organizations use social media or online searches to screen applicants or candidates for jobs, according to a 2016 Society for Human Resource Management (SHRM) survey.[52] Despite its increasing popularity, using social media for hiring can result in biased decision making that could potentially spell legal trouble for companies if they discriminate against protected classes (see the chapter on diversity).[53] For instance, the University of Kentucky paid a $125,000 settlement to an astronomy professor when they removed him from consideration for a position due to his outspoken belief of creationism on social media.[54]

Indeed, research supports the social media decision-making bias link. In a series of studies using Facebook profiles, researchers found that when the applicant's political affiliation displayed on their social media matched the hiring manager's, the manager was more likely to perceive the applicant as similar, likeable, a potentially strong performer, and more hirable than one with a different political affiliation.[55] Furthermore, a separate series of studies demonstrated that Facebook profiles provide hiring managers with non-work-related information (e.g., demographic characteristics, profanity, and sexual behavior) that should not be the basis for hiring. Even systematically structuring the assessment of Facebook profiles (like a structured interview; see the chapter on human resources) was not enough to eliminate these biases,[56] although some research has shown promise for networking sites *specifically* dedicated to work-relevant information (e.g., LinkedIn).[57]

Potential Remedies Technology has been proving useful in combatting these biases—for example, AI-assisted performance assessments and other decision-support systems can help reduce these common shortcuts in judging others.[58] These types of "mechanical" data analytic methods are very effective—in fact, one review of studies found that mechanical methods were 50 percent more effective than subjective methods at judging job performance.[59] However, as we note in the introductory chapter, it is still unclear whether AI itself can lead to bias depending on how it is programmed. As another example, research suggests that decision-making errors stem from lapses in attention and memory. Organizations should do what they can do to ensure that employees feel as if they are in control of their environment to lessen attentional resource-draining demands. Since the advent of COVID-19, telecommuting and remote work have become more common and may be ways in which cognitive errors at work can be avoided by enabling employees to have control over their environments and protect resources.[60]

Myth or Science?

All Stereotypes Are Negative

This statement is false. Positive stereotypes exist as much as negative ones.

A study of Princeton University students shows, for example, that even today many people believe Germans are better workers, Italians and Black people are more loyal, Jews and Chinese are more intelligent, and Japanese and English are more courteous. What is surprising is that positive stereotypes are not always positive.

We may be more likely to "choke" (fail to perform) when we identify with positive stereotypes because they induce pressure to perform at the stereotypical level. For example, men are commonly believed to have higher math ability than women. A study showed that when this stereotype is activated before men take a math test, their performance on the test decreases. The belief that White men are better at science and math than women or ethnic minorities caused White men in another study to leave science, technology, engineering, and math majors. One study used basketball to illustrate the complexity of stereotypes. Researchers provided evidence to one group of undergraduates that White players were better at free throws than Black players. Another group was provided evidence that Black players were better at free throws than White players. A third group was given no stereotypical information. The undergraduates in all three groups then shot free throws while observers watched. The people who performed the worst were those in the negative stereotype condition (Black undergraduates who were told White players were better and White undergraduates who were told Black players were better). However, the positive stereotype group (Black undergraduates who were told Black players were better and White undergraduates who were told White players were better) also did not perform well. The best performance was by those in the group without stereotypic information.

"Choking" is not the only negative thing about positive stereotypes. Research revealed that when women or Asian Americans heard positive stereotypes about themselves ("women are nurturing"; "Asians are good at math"), they felt depersonalized and reacted negatively to the individual expressing the positive stereotype. Another study showed that positive stereotypes about Black people solidified negative stereotypes because any stereotype tends to reinforce group-based differences, whether positive or negative.

Stereotypes are understandable. To function, we need shortcuts; however, shortcuts run both ways. Because stereotypes are socially learned, we need to be vigilant about not accepting or propagating them among our coworkers and peers.[61]

One problem with stereotypes and other biases is that they *are* based on generalizations, although they may not contain a shred of truth when applied to a particular person or situation. We must monitor ourselves to make sure we are not unfairly applying a stereotype in our evaluations and decisions. Stereotypes are an example of the warning "The more useful, the more danger from misuse." Regardless, understanding the link between perception and decision making, as we discuss in the next section, can help us recognize when our perceptions are interfering with our ability to make effective decisions.

The Link Between Perception and Individual Decision Making

6-3 Explain the link between perception and decision making.

Individuals make **decisions**, or choices from among two or more alternatives.[62] Ideally, decision making would be objective rather than subjective, but the ways individuals make decisions are largely influenced by their perceptions. In fact, according to a recent survey (see OB Poll), many managers spend at least 31 percent of their time on decision making. It may be tempting to think that spending more time on decision making naturally makes you better at it—but over 60 percent of managers report that less than half of the time they spend on decision making is actually effective *regardless of the amount of time they spend on it.*

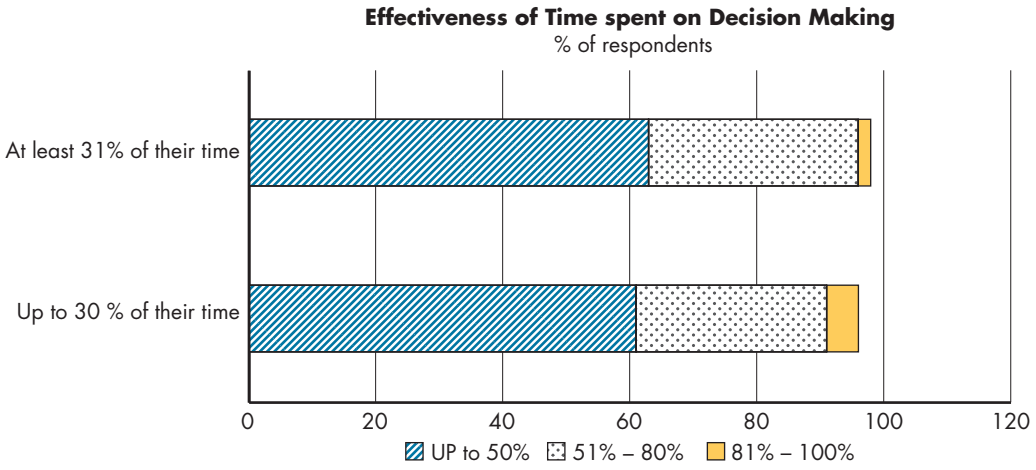
Decision making occurs as a reaction to a **problem**. That is, a discrepancy exists between how things are and how we want them to be, requiring us to consider

decisions Choices made from among two or more alternatives.

problem A discrepancy between the current state and some desired state.

OB POLL

Are Managers Using Decision-Making Time Effectively?



Source: Based on I. Aminov, A. De Smet, G. Jost, and D. Mendelsohn, "Decision Making in the Age of Urgency," *McKinsey & Company*, April 30, 2019, https://www.mckinsey.com/business-functions/organization/our-insights/decision-making-in-the-age-of-urgency

how we can address this discrepancy. If your Wi-Fi router breaks down and you rely on it to telecommute, you have a problem that requires a decision on your part. Unfortunately, most problems do not come neatly labeled. One person's *problem* is another's *desired state*. One manager may view their division's 2 percent decline in quarterly sales to be a serious problem requiring immediate action on their part. The manager's counterpart in another division, who also had a 2 percent sales decrease, might consider it quite acceptable. Awareness that a problem exists and that a decision might (or might not) be needed is a perceptual issue.

Every decision requires us to interpret and evaluate information. We typically receive data from multiple sources that we need to screen, process, and interpret. Which data are relevant to the decision, and which are not? Our perceptions help us, accurately or inaccurately, answer that question. We must consider how our perceptions of the situation influence our decisions, sometimes in ways we would not expect. For example, employees *should* be especially receptive to problems during times of economic instability. (Times are hard, and they want to keep their jobs!) However, when other employment opportunities are scarce, employees may be motivated to deny or ignore that there are problems in their organization.[63]

Decision Making in Organizations

6-4 Contrast the rational model of decision making with bounded rationality and intuition.

Business schools typically train students to follow rational decision-making models. While such models have merit, they do not always describe how people make decisions. OB improves the way we make decisions in organizations by addressing both perceptual and decision-making errors. First, we describe some decision-making approaches, and then we outline a few of the most common errors.

The Rational Model, Bounded Rationality, and Intuition

In OB, rational decision making, bounded rationality, and intuition are generally accepted approaches to decision making. However, they may not lead to the most accurate (or best) decisions. More importantly, there are times when one strategy may lead to a better outcome than another in a given situation.

Exhibit 6-3 Steps in the Rational Decision-Making Model

1. Define the problem.
2. Identify the decision criteria.
3. Allocate weights to the criteria.
4. Develop the alternatives.
5. Evaluate the alternatives.
6. Select the best alternative.

Rational Decision Making We often think the best decision maker is **rational** and makes consistent, value-maximizing choices within specified constraints.[64] In other words, good decision makers consistently make choices that enable them to enjoy the most benefits, given the situation. Rational decisions follow a six-step **rational decision-making model**[65] (see Exhibit 6-3).

rational A style of decision making characterized by making consistent, value-maximizing choices within specified constraints.

rational decision-making model A decision-making model that describes how individuals should behave to maximize some outcome.

The rational decision-making model assumes the decision maker has complete information, can identify all relevant options without bias, and chooses the option with the highest utility.[66] However, most decisions do not follow this model; people are usually content to find an acceptable or reasonable solution to a problem rather than an optimal one. We tend to be limited in time, resources, and awareness, leading us to focus on the symptoms of the problem and current, possible solutions. As one expert in decision making put it, "Organizations pursue intelligence. It is not a trivial goal. Its realization is imperfect and the pursuit is endless."[67] Despite this "imperfect" and "endless" pursuit, people are remarkably unaware that they are making constrained, suboptimal decisions.[68]

Bounded Rationality Often, we do not follow the rational decision-making model for a reason: Our limited abilities to process information make it impossible to assimilate all the information we need, even if it is readily obtainable.[69] Because we cannot solve complex problems with full rationality, we operate within the confines of **bounded rationality**. We take a simplified approach, perceiving and interpreting the essential features of problems without capturing their complexity. We then behave rationally within these boundaries.

bounded rationality A simplified process of making decisions by perceiving and interpreting the essential features of problems without capturing their complexity.

To use the rational model, you need to gather a great deal of information about all the options, compute applicable weights, and then calculate values across a huge number of criteria. All these processes can cost time, energy, and money. Many problems do not have an optimal solution because they are too complicated to fit the rational decision-making model. Furthermore, if we were to use the rational approach, we may run into a situation where the problem is *intractable*. An **intractable problem** occurs when we spend so much time organizing the decision-making process, gathering information, and engaging in analysis and judgment that by the time we finish doing so, the problem has changed entirely or become irrelevant.[70]

intractable problem A problem that may change entirely or become irrelevant before we finish the process of organizing our thoughts, gathering information, analyzing the information, and making judgments or decisions.

Instead of engaging in these intensive, rational processes, in some situations we reduce complex problems to a level we can readily understand. One outcome of bounded rationality is a tendency to *satisfice,* or seek solutions that are merely sufficient (e.g., "good enough"). While the satisficing answer is acceptable but not necessarily optimal, it is not always a bad method. Often, a simple process may frequently be more sensible than the traditional rational decision-making model.[71]

Bounded rationality can be of concern in ethical decision making (as discussed later in this chapter). Not only are we prone to make systematic and predictable errors in ethical decisions, but our perceptions of whether we have the freedom or *right* to behave in a particular way are bounded by our *duties* toward the people our actions affect.[72] For example, you *want* to take the last doughnut in the break room, but you know that you *should not* in case someone has not

had one yet. Researchers have identified ways in which the automatic effects of our bounded rationality can be addressed: Be sure to ask multiple questions to understand the situation better, draw on multiple sources of information, evaluate your sources of information, and leave enough time to decide.[73]

intuitive decision making An unconscious process created out of distilled experience.

Intuition Perhaps the least rational way of making decisions is **intuitive decision making**, an unconscious process created from distilled experience.[74] Intuitive decision making occurs outside conscious thought; relies on holistic associations, or links between disparate pieces of information; is fast; and is *affectively charged*, meaning it engages the emotions.[75] While intuition is not rational, it is not inherently bad or necessarily wrong, nor does it always contradict rational analysis. Within the confines of bounded rationality, in situations requiring quick decisions (e.g., crises) or highly risky or uncertain contexts, we may need to rely on experts' intuitions to identify quick solutions or take desirable risks.[76]

Does intuition help effective decision making? Researchers are divided, but most experts are skeptical, in part because intuition is hard to measure and analyze. Furthermore, intuition can lead you to "close your eyes to follow your heart," or ignore contradictory information to protect your intuition, even when it is not correct.[77] Much of the research on dozens of decision-making studies suggests that intuition, although it "feels right," does not correspond with rationally made decisions and perhaps leads to inaccurate decisions.[78] Probably the best advice from one expert is "Intuition can be very useful as a way of setting up a hypothesis but is unacceptable as 'proof.'" Use hunches derived from your experience to speculate, yes, but always make sure to test those hunches with objective data and rational, dispassionate analysis.[79]

As you can see, the more we use objective processes for decision making, the more likely we are to correct some of the problems with our perceptual process. Just as there are biases and errors in the perception process, it stands to reason there are identifiable biases and errors in our decision making, which we will outline next.

Common Biases and Errors in Decision Making

We often think of vital, critical judgments of decision makers as careful and deliberate. However, bias and error affect decision makers at all levels of organizations. For instance, scientific peer review is not immune; many of the same biases that behavioral scientists study also infect the peer review process.[80] Indeed, systematic biases and errors can creep into the judgments of decision makers.[81] To minimize effort and avoid trade-offs, people tend to rely too heavily on experience, impulses, gut feelings, and convenient rules of thumb. Exhibit 6-4 provides some suggestions for avoiding these biases and errors.

overconfidence bias A tendency to be overconfident about our own abilities or the abilities of others.

Overconfidence Bias We tend to be too confident about our abilities and the abilities of others, but we are usually not aware of this **overconfidence bias**.[82] This overconfidence can emerge in organizations, especially during informal interviews. For example, hiring managers may be overconfident about how well they evaluate candidates after an informal interview.[83] Furthermore, some research shows hiring managers can be overconfident in their evaluation of stigmatized candidates (e.g., candidates with facial scars or birthmarks), even when it is clear they were prejudiced in their decisions.[84]

Individuals whose intellectual and interpersonal abilities are *weakest* are most likely to overestimate their performance and ability.[85] There is also a negative relationship between entrepreneurs' optimism and performance of their new ventures: the more optimistic, the more likely they are to start a new business quickly, persist too long in the market, and overall become the least successful.[86] The tendency to be too confident about their ideas might keep some from

Exhibit 6-4 Reducing Biases and Errors

Focus on Goals. Without goals, you cannot be rational, you do not know what information you need, you do not know which information is relevant and which is irrelevant, you will find itdifficult to choose between alternatives, and you are far more likely to experience regret over the choices you make. Clear goals make decision making easier and help you eliminateoptions that are inconsistent with your interests.

Look for Information That Disconfirms Your Beliefs. One of the most effective means for counteracting overconfidence and the confirmation and hindsight biases is to actively look for information that contradicts your beliefs and assumptions. When we overtly consider various ways we could be wrong, we challenge our tendencies to think we are smarter than we actually are.

Do Not Try to Create Meaning out of Random Events. The educated mind has been trained to look for cause-and-effect relationships. When something happens, we ask why. And when we cannot find reasons, we often invent them. You have to accept that there are events in life that are outside your control. Ask yourself if patterns can be meaningfully explained or whether they are merely coincidence. Do not attempt to create meaning out of coincidence.

Increase Your Options. No matter how many options you have identified, your final choice can be no better than the best of the option set you have selected. This argues for increasing your decision alternatives and for using creativity in developing a wide range of diverse choices. The more alternatives you can generate, and the more diverse those alternatives, the greater your chance of finding an outstanding one.

Source: Based on S. P. Robbins, *Decide & Conquer: Making Winning Decisions and Taking Control of Your Life* (Upper Saddle River, NJ: Financial Times/Prentice Hall, 2004), 164–68.

planning how to avoid problems that arise. Research also demonstrates that once entrepreneurs establish their businesses, founder CEOs tend to be much more overconfident than their successors. One study "scraping" CEO earnings calls, press releases, and social media posts found that founder CEOs use highly optimistic language, inflate earnings forecasts, and perceived their firms to be undervalued compared to their successor counterparts.[87]

Investor overconfidence operates in a variety of ways.[88] Finance professor Terrance Odean says, "People think they know more than they do, and it costs them." Investors, especially novices, overestimate not just their skill in processing information but also the quality of the information. Most investors will do only as well as or just slightly better than the market.

Overconfidence also has a relationship with leadership emergence (which we discuss in the chapter on leadership). People are more likely to select the overconfident as leaders as they tend to ease their sense of ambiguity and overconfidence fits the perceiver's understanding of what it means to be a leader.[89] Furthermore, overconfidence bias is more likely to emerge in leaders who are powerful, ambitious, and of a higher social class and, in some cases, leads to higher firm performance.[90] However, despite initial benefits, overconfidence may eventually backfire: As overconfidence is revealed (the person's behaviors are not as good as they say they are or their claims are falsifiable), people begin to perceive the overconfident person negatively, which damages their reputation.[91] Overconfidence also affects the extent to which managers and executives take risks, viewing all feedback (e.g., financial performance data) optimistically.[92]

Anchoring Bias **Anchoring bias** is a tendency to fixate on initial information and fail to adequately adjust to subsequent information.[93] Similar to the halo and horns effects discussed earlier, the mind appears to disproportionately emphasize the first information it receives. Anchors are widely used by people

anchoring bias A tendency to fixate on initial information, from which one then fails to adjust adequately for subsequent information.

in professions in which persuasion skills are important—advertising, management, politics, real estate, and law. For instance, executives might draw on the numbers from others' recent international acquisition decisions to determine how much equity to purchase in international firms.[94]

Any time a negotiation takes place, so does anchoring. When a prospective employer asks how much you made in your prior job, your answer typically anchors the employer's offer. (Remember this when you negotiate your salary, but set the anchor only as high as you truthfully can.) The more precise your anchor, the smaller the subsequent adjustments during negotiation. Some research suggests people think of making an adjustment after an anchor is set as rounding off a number: If you suggest a salary of $55,000, your boss will consider $50,000 to $60,000 a reasonable range for negotiation, but if you mention $55,650, your boss is more likely to consider $55,000 to $56,000 the range of likely values.[95]

confirmation bias The tendency to seek out information that reaffirms past choices and to discount information that contradicts past judgments.

Confirmation Bias The rational decision-making process assumes we objectively gather information. But we do not. We *selectively* gather it. **Confirmation bias** represents a case of selective perception: We seek out (and accept) information that reaffirms our past choices and current views, and we discount (or are skeptical of) information that challenges them.[96] We even tend to seek sources most likely to tell us what we want to hear, and we give too much weight to supporting information and too little to contradictory information. The confirmation bias applies to person perception (discussed earlier in this chapter): Once we settle on a trait attribution, we seek out and accept information that reaffirms this perception.[97] For example, if your supervisor sees you as unreliable, they are more likely to perceive when you are unreliable than when you are reliable. Confirmation bias may be especially troublesome for entrepreneurs and startups, given the consequences of making faulty decisions in new ventures and failing to learn quickly.[98]

The advent of social media has created an "echo chamber" of sorts, with confirmation bias running rampant.[99] Advertising algorithms profit off confirmation bias by tailoring messages toward people inclined to believe them.[100] To combat these confirmation biases in your work and nonwork lives, seek out and critically evaluate information that counters your beliefs or opinions. As Walt Whitman wrote in *Song of Myself*, "Listen to all sides and filter them from yourself."[101]

availability bias The tendency for people to base their judgments on information that is readily available to them.

Availability Bias **Availability bias** is our tendency to base judgments on readily available information. Events that evoke emotions are particularly vivid, and those that are more recent tend to be more available in our memory, leading us to overestimate the chances of unlikely events.[102] This can lead us to overestimate the chances of unlikely events, such as being in an airplane crash, suffering complications from medical treatment, or getting fired.[103] Availability bias can help explain why managers give more weight in performance appraisals to recent employee behaviors than to behaviors of six to nine months earlier.[104]

Because the challenges people have faced are often more salient than times when things have gone well, employees may also tend to believe they have it worse than others.[105] For example, employees who have been on the job longer may discount the work experiences of newer employees as "easier" because they focus more on their own challenging experiences rather than when things were easier for them. Availability bias might even be operating now as you are navigating and exploring potential careers and occupations—you may be attracted toward or repelled from careers based on (potentially inaccurate) information or experiences with those careers.[106]

Escalation of Commitment Another distortion that creeps into decisions is a tendency to persist even when there is evidence that one should try a

different approach or give up, often driven by nonrational reasons. **Escalation of commitment**, also referred to as the *sunk cost effect*, refers to our staying with a decision even if there is clear evidence that it is wrong.

escalation of commitment An increased commitment to a previous decision despite negative information.

When is escalation most likely to occur? Evidence indicates that it occurs when individuals view themselves as responsible for the outcome or when they feel like they will eventually succeed.[107] The fear of personal failure even biases the way we search for and evaluate information so that we choose only information that supports our dedication.[108] It does not appear to matter whether we chose the failing course of action or it was assigned to us—we feel responsible and escalate in either case. Also, the sharing of decision authority—such as when others review the choice we made—can lead to higher escalation.[109] Recent research on entrepreneurial teams suggests that it is not only sharing authority that leads to escalation, but rather the collective emotions the team experiences: Hope of eventually attaining the goal tends to trump the fear of failure.[110]

We usually think of escalation of commitment as ungrounded. However, persistence in the face of failure is responsible for many of history's greatest feats: the building of the Pyramids, the Great Wall of China, the Panama Canal, and the Empire State Building among them. Researchers suggest that a balanced approach includes frequent evaluation of alternative courses of actions, the spent costs, and whether the next step is worth the anticipated costs.[111] What we want to combat is the tendency to *automatically* escalate commitment.

Randomness Error People default toward believing that they have some control over the world. Our tendency to believe we can predict the outcome of random events is the **randomness error**.

randomness error The tendency of individuals to believe that they can predict the outcome of random events.

Decision making suffers when we try to create meaning in random events, particularly when we turn imaginary patterns into superstitions.[112] These can be completely contrived ("I never make important decisions on Friday the 13th") or they can evolve from a reinforced past pattern of behavior (Tiger Woods wears a red shirt playing golf on Sundays because he won many junior tournaments wearing red shirts).[113] They can also result from the stress of emotional dissonance (see the chapter on emotions and moods). Studies show that stress reduces the individual's sense of control, and that to regain control, people may engage in magical rituals or superstitions like knocking on wood.[114]

Risk Aversion Mathematically speaking, we should find a fifty-fifty flip of the coin for $100 to be worth as much as a sure promise of $50. After all, the expected value of the gamble over several trials is $50. However, nearly everyone would rather have the sure thing than a risky prospect.[115] For many people, a fifty-fifty flip of a coin even for $200 might not be worth as much as a sure promise of $50, even though the gamble is mathematically worth twice as much! This tendency to prefer a sure thing over a risky outcome is **risk aversion**.

risk aversion The tendency to prefer a sure gain of a moderate amount over a riskier outcome, even if the riskier outcome might have a higher expected payoff.

Overall, the framing of a decision has an effect on whether people will engage in risk-averse behavior—when decisions are framed positively, such as a potential gain of $50, people will be more risk averse. (Conversely, when the decision is framed in a negative manner, such as a loss of $50, people will engage in riskier behaviors.)[116] Based on a storied program of research several decades ago, Professor Daniel Kahneman won a Nobel Prize in 2002 for the finding that people assess their gains and losses in this way.[117] The influence of framing and risk aversion are undoubtedly some of the most critical biases that can be encountered in the workplace.

CEOs at risk of termination are exceptionally risk averse, even when a riskier investment strategy is in their firms' best interests.[118] Organizations have a stronger hold on employees who are more risk averse because these employees tend to

perceive that they have more to lose and are less likely to leave the organization.[119] Risk preference is sometimes reversed: People take chances when trying to prevent a negative outcome.[120] They may thus risk losing a lot of money at trial rather than settle for less out of court. Stressful situations can make risk preferences stronger. People under stress are more likely to engage in risk-seeking behavior to avoid negative outcomes and in risk-averse behavior when seeking positive outcomes.[121]

hindsight bias The tendency to believe falsely, after an outcome of an event is known, that one would have accurately predicted that outcome.

Hindsight Bias **Hindsight bias** is the tendency to believe falsely, after the outcome is known, that we would have accurately predicted it.[122] When we have feedback on the outcome, we seem good at concluding it was obvious.

For instance, Or Shani, the founder of Albert Technologies (the maker of the first autonomous digital marketer), notes that marketers this decade struggled with creating seamlessly digital technologies to replace their cumbersome manual processes—it was easy to conclude in hindsight that *cumbersome* digital systems would merely replace *cumbersome* manual processes (and that innovation was a futile exercise).[123] The state of marketing, according to Shani, has not fully realized its digital transformation as a result (although Shani believes AI will be the final "push" that will fully bring marketing into the digital age).[124] What seems obvious now in hindsight tempts us to think we would have predicted it, and many experts actually fail to predict industry trends in advance or give up altogether in the face of one failure or setback. Though criticisms of decision makers may have merit, as Malcolm Gladwell, author of *Blink* and *The Tipping Point,* writes, "What is clear in hindsight is rarely clear before the fact."[125]

outcome bias The tendency to judge the quality of a decision based on the desirability or believability of its outcome.

Outcome Bias **Outcome bias** is the tendency to judge the quality of a decision based on the desirability or believability of its outcome.[126] If we have information about the quality of an outcome, we may jump to the conclusion that the decision was strong (even though the decision-making process itself may have been flawed). Furthermore, we may also judge decisions with outcomes that do not seem believable or logical as faulty. These processes occur if the effort that it would take to thoroughly judge a decision is more cumbersome than just evaluating the believability or desirability of the outcome.[127] In turn, decision makers use more lenient criteria in judging decisions with believable, desirable outcomes.[128]

Outcome bias is particularly an issue with performance ratings and appraisal.[129] For instance, sales managers who focus too much on the outcome (e.g., increased sales) in evaluating sales professionals may overlook the methods through which they attain increased sales (e.g., fudging the numbers, high-pressure tactics directed toward customers). Outcome bias can also operate in the extent to which employees and managers accept evidence and information that might guide their actions. For instance, although evidence may support or refute the effectiveness of a politicized business practice (e.g., government regulation),[130] employees or managers may dismiss it outright because it goes against their beliefs (e.g., claiming that it is "fake news").[131] Finally, outcome bias is often used to sales professionals' advantage.[132] For instance, sales professionals will often focus on the desirability of the outcome (e.g., "Imagine a life free of back pain") or ask rapid-fire, logical questions to capitalize on customer beliefs (e.g., "Do you wake up in back pain every day?" "Have you tried other solutions?" "Would you do anything to free yourself from back pain?") in their sales pitches.

Before we move on to the next sections, it is important to consider what we *can* do to limit the extent to which biases affect our decision making. Employees and managers would do well to take a step back and (1) reflect and reframe problems in different ways; (2) undergo training on structured decision-making approaches to rely less on fast, emotional heuristics; and (3) alter the way in which decisions are made to reduce bias, such as through setting explicit standards for decisions.[133] The first piece of advice is especially salient, given newer

research that suggests that all biases are rooted in focusing on the most salient information and insensitivity to alternatives—the more we truly consider other options (and not the most salient), the less likely we are to default to biased decision making.[134] We are all susceptible to biases, but are we all susceptible to the same degree? It is not likely. Our individual differences play a significant role in our decision-making processes, while our organizations constrain the range of our available decision choices.

Influences on Decision Making: Individual Differences and Organizational Constraints

6-5 Explain how individual differences and organizational constraints affect decision making.

Many factors, such as individual differences and organizational constraints, influence the way people make decisions and the degree to which they are susceptible to errors and biases.

Individual Differences

As we discussed, decision making in practice is characterized by bounded rationality, common biases and errors, and the use of intuition. Individual differences such as personality also create deviations from the rational model.

Personality Several personality traits are related to taking on specific decision-making strategies or to experiencing errors or biases during decision-making. First, employees differ in the extent to which they trust their intuitions, and this can lead them to make a riskier decision or even to be harsher when condemning unethical behavior.[135] Second, people with high self-esteem (see the chapter on personality and individual differences) are strongly motivated to maintain it, so they use the self-serving biases to preserve it. They may be more prone to blame others for their failures while taking credit for successes.[136] Third, narcissists (see the chapter on personality and individual differences) naturally tend to be prone to overconfidence or overclaiming and to self-serving biases.[137]

Several personality traits from the Big Five Model are also relevant for decision making. For instance, employees who are less close-minded (or higher on openness) tend to be less prone toward selective perception or the confirmation bias, as they are more receptive to contradictory information.[138] Furthermore, extroversion has been linked to riskier behavior among CEOs, with these executives being more likely to pursue acquisitions of other firms and engage in behaviors that pose a threat to their equity.[139] Specific facets of conscientiousness—particularly achievement-striving and dutifulness—may affect escalation of commitment.[140] First, achievement-oriented people hate to fail, so they escalate their commitment, hoping to forestall failure. Dutiful people, however, are more inclined to do what they see as best for the organization, so they are less likely to escalate their commitment. Second, achievement-striving individuals appear more susceptible to hindsight bias, perhaps because they have a need to justify their actions.[141]

Gender Identity Does gender influence decision making? Most research supports the *gender similarities hypothesis* in which there are little to no differences between genders on psychological variables. Even when differences are found, we must resist the urge to think of them categorically. For instance, even though some research has found that young women score higher than men on self-control, their distributions exhibit substantial overlap and disappear after age eleven.[142] That having been said, there are a handful of gender differences in decision making. For one, research suggests that men are more prone to sensation seeking and

risk taking than women to a non-trivial degree.[143] Research during the COVID-19 pandemic suggests that women are more likely to engage in preventive health practices (e.g., social distancing, handwashing, mask-wearing). Further, using GPS data collected from 15 million smartphones at the onset of the pandemic, these researchers found that a greater percentage of women exhibited greater social distancing.[144] Although there is less research on gender differences in decision-making biases in workplace settings, one meta-analysis based on dozens of studies and thousands of people found that men tend, to a moderate degree, to make employment decisions that are gender-role biased for positions that are stereotypically masculine.[145] Women, on the other hand, did not experience the same bias.

Intellectual Abilities We know people with higher levels of general mental ability (GMA; see the chapter on personality and individual differences) can process information more quickly, solve problems more accurately, and learn faster,[146] so you might expect them to be less susceptible to common decision errors. However, GMA appears to help people avoid only some of them.[147] Smart people are just as likely to fall prey, probably because being smart does not alert you to the possibility that you are too confident or emotionally defensive. It is not that intelligence is irrelevant. For instance, research on a particular intellectual ability, *cognitive flexibility* (i.e., the ability to select the appropriate decision-making strategy to match the problem), suggests that it can lead to better decisions for both ill-defined and well-structured problems.[148]

Cultural Differences The cultural background of a decision maker can significantly influence the selection of problems, the depth of analysis, the importance placed on logic and rationality, and whether organizational decisions should be made by a leader or collectively as a group.[149] Cultures differ in time orientation, the value they place on rationality, their belief in the ability of people to solve problems, and their preference for collective decision making. While the overt rationality of the decision-making processes is valued in North America, this is not necessarily true elsewhere. For example, research on Swedish and German teams found that the Swedish generally took longer to make decisions than the German teams did, which was attributed to the consensus-orientation of the Swedish teams' members. German teams preferred a more formal decision-making style based on clear roles. Other researchers found that Turkish employees expect senior managers to make decisions, but they like their opinion to be asked, a preference shaped by cultural power distance; in Japan, on the other hand, team decision-making tends to emphasize consensus-orientation.[150]

Organizational Constraints

Organizations can constrain decision makers, creating deviations from the rational model. For instance, managers make decisions that are influenced by the organization's performance evaluation and reward systems, comply with formal regulations and company precedents, and meet organizationally imposed time constraints.

Performance Evaluation Systems Managers are influenced by the criteria on which they are evaluated. If a division manager, who oversees a group of manufacturing plants, believes they are operating best when there is no negative feedback from staff or auditors, the plant managers will spend a good part of their time ensuring that negative information does not reach the division manager.

Reward Systems The organization's reward systems influence decision makers by suggesting which choices have better personal payoffs. If a significant percentage of an employee's pay is based on incentives and an organization sets goals for employees that are too unrealistic, there is a greater risk of dysfunctional and unethical behaviors. For example, Wells Fargo's[151] aggressive incentives program led employees to open two million fake accounts to earn higher incentive payouts.

Formal Regulations A shift manager at a Taco Bell restaurant in San Antonio, Texas, describes constraints faced on the job: "I've got rules and regulations covering almost every decision I make—from how to make a burrito to how often I need to clean the restrooms. My job doesn't come with much freedom of choice." The manager's situation is not unique. All but the smallest organizations create rules and policies to program decisions and get individuals to act in the intended manner. In doing so, they limit decision choices—but they also structure the decision-making process to reduce bias. For instance, research has shown that CEO succession planning processes results in a greater quality and quantity of a candidate pool for hiring a replacement CEO.[152]

Time Constraints Almost all important decisions come with explicit deadlines. For example, a report on new-product development may have to be ready for executive committee review by the first of the month. Such conditions often make it difficult, if not impossible, for managers to gather all information before making a final choice, thus harming decision performance.[153]

Historical Precedents Decisions are not made in a vacuum; they have context. Individual decisions are points in a stream of choices; those made in the past are like ghosts that haunt and constrain current choices. It is common knowledge that the largest determinant of the size of any given year's budget is last year's budget. Choices made today are largely a result of choices made over the years. For instance, even the changing nature of school curriculum can impact strategic choice. For instance, research on CEOs who ran more than six hundred large corporations



Manager Kely Guardado (center) prepares hamburgers alongside employees at a Five Guys Burger and Fries restaurant. The autonomy of Five Guys crew members are limited because workers are required to follow rules and regulations for food preparation that meet the firm's high standards of quality, safety, and service.

Source: Yuri Gripas/Reuters

between 1985 and 2015 found that those who graduated with their MBA before 1970 were more likely to pursue diversification strategies, whereas those graduating after 1970 were less likely to do so, reflecting differences in typical MBA curricula.[154]

Decision Making in Times of Crisis During the COVID-19 pandemic of 2020, employees and leaders of businesses alike were forced to make extremely difficult decisions amid chaos, confusion, and uncertainty.[155] For instance, one senior analyst at Forrester reflected that COVID-19 resulted in unprecedented uncertainty coupled with rapidly incoming information–a combination that left people without a template for what to do and without the luxury of time to thoughtfully consider how to respond.[156] Decision makers are particularly susceptible to biases and distortion during times of crisis. For example, expert credit-rating agencies are more likely to provide negative or pessimistic ratings of creditworthiness during times of crisis, even when the creditworthiness of these target people or organizations would not be affected by the crisis.[157] Furthermore, decisions made during times of crisis are more likely to be emotionally charged and intuitive.[158] Not only does the strain of the crisis add an additional layer of anxiety and negative emotions to typical decisions, but the decisions in and of themselves may become highly charged, such as how doctors and nurses had to make extremely tough decisions as to who would receive treatment during the COVID-19 pandemic.[159] Relatedly, justice and ethics in decision making (see the following section for more discussion) play a huge role in times of crisis. Indeed, perceptions of justice are incredibly important during times of crisis, influencing employee attitudes and customer reactions alike.[160] Consumers are always watching, and they are vigilant of the actions companies take. As a result, the values of these companies are apparent through their actions. Therefore, leaders should look to their employees and customers for insight and direction when making decisions during crises.[161]

Ethics in Decision Making

6-6 Contrast the three ethical decision criteria.

As discussed in the prior section, ethical considerations should be important to organizational decision making, but not just during times of crisis. In this section, we present three ways to frame ethical decisions and address the important issue of how lying affects decision making.

Three Ethical Decision Criteria

utilitarianism An ethical perspective in which decisions are made to provide the greatest good for all.

The first ethical yardstick is **utilitarianism**, which proposes making decisions solely based on their *outcomes*, ideally to provide the greatest good for all.[162] This view dominates business decision making and is consistent with goals such as rationality, efficiency, productivity, and high profits.[163] Keep in mind that utilitarianism is not always as objective as it sounds. One study indicated that the ethicality of utilitarianism is influenced in ways we do not realize. Participants were given a moral dilemma: The weight of five people bends a footbridge so it is low to some train tracks. A train is about to hit the bridge. The choice is to let all five people perish or push the one heavy person off the bridge to save four people. In the United States, South Korea, France, and Israel, 20 percent of respondents chose to push the person off the bridge; in Spain, 18 percent chose to do so; and in Korea, none did. These might speak to cultural utilitarian values, but a minor change, asking people to answer in a non-native language they knew, caused more participants to push the person overboard: In one group, 33 percent pushed the person, and in another group, 44 percent

did.[164] The emotional distance of answering in a non-native language seemed to foster a utilitarian viewpoint.[165] It appears that even our view of what we consider pragmatic is changeable.

Another ethical criterion is to make decisions consistent with fundamental liberties and privileges, as set forth in documents such as the U.S. Bill of Rights. An emphasis on *rights* in decision making means respecting and protecting the basic rights of individuals, such as the right to privacy, free speech, and due process.[166] This criterion protects **whistleblowers**[167] when they reveal an organization's unethical practices to the press or government agencies, using their right to free speech.

whistleblowers Individuals who report unethical practices by their employer to outsiders.

A third criterion is to impose and enforce rules fairly and impartially to ensure *justice* or an equitable distribution of benefits and costs.[168] This criterion is often approached from a **deonance** standpoint (employees feel as if they *ought* to behave in a certain way, as laid out in rules, laws, norms, or moral principles).[169] For example, some employees might feel as if they *should not* steal from their workplace because it is ethically "wrong" by moral norms, principles, or standards or it is forbidden by rules or laws. Notably, this "ought force" is present regardless of whether organizational rules exist; often, a decision is regarded as unfair or unjust because it violates a moral norm or principle.

deonance A perspective in which ethical decisions are made because you "ought to" in order to be consistent with moral norms, principles, standards, rules, or laws.

Choosing Between Criteria

Decision makers, particularly in for-profit organizations, feel comfortable with utilitarianism. The "best interests" of the organization and its stockholders can justify a lot of questionable actions, such as large layoffs. However, while raising prices, selling products with questionable effects on consumer health, closing inefficient plants, laying off large numbers of employees, and moving production overseas to cut costs can be justified in utilitarian terms, there may no longer be a single measure by which good decisions are judged. This presents a challenge because satisfying individual rights and social justice creates far more ambiguities than utilitarian effects on efficiency and profits. Indeed, the ethical decision-making process itself is complex, and the traditional perspective of viewing these criteria as completely separate is giving way to one that views them as interrelated and contingent upon whether decisions are made about the self or judging others' behavior.[170]

This is where CSR comes in to effect a positive change. As we can see by looking at utilitarian ideals, organizations may approach decisions in a certain way when they are looking only at a balance sheet. However, public pressure on organizations to behave responsibly has meant that sustainability issues clearly affect the bottom line: Consumers increasingly choose to purchase goods and services from organizations with effective CSR initiatives, high performers are attracted to work at CSR organizations, governments offer incentives to organizations for sustainability efforts, and so forth.[171]

Behavioral Ethics

Increasingly, researchers are turning to **behavioral ethics**—an area of study that analyzes why people behave the way they do when confronted with ethical dilemmas.[172] While ethical standards exist collectively in societies and organizations, as well as individually in the form of personal ethics, we do not always follow ethical standards promoted by our organizations. Sometimes we even violate our own standards. Our ethical behavior varies widely from one situation to the next. Simply put, behavioral ethics is the study of *why good people can still do bad things.*[173]

behavioral ethics Analyzing why people behave the way they do when confronted with ethical dilemmas.

You may be wondering how behavioral ethics is different from business ethics. We do not blame you, given how similar the terms appear. However, there is

a difference between the two.[174] Business ethics primarily focuses on the *how* and *what* questions. Questions relevant to business ethics include "How can we manage ethical behavior?" and "What are the outcomes of injustice in the workplace?" On the other hand, behavioral ethics primarily concerns the *why* questions, such as "What are the psychological processes that inform (un)ethical behavior?" Behavioral ethics operates at multiple levels, concerning individuals, groups, and organizations, similar to our overarching model of OB introduced in the first chapter. At the individual level, behavioral ethics focuses on ethically relevant personality traits and individual differences along with cognitive, affective, and identity-relevant processes. At the group level, we are concerned with the phenomena of (un)ethical leadership, including the influence of power, corruption, and collective action among followers. At the organization level, we are interested in the ethical infrastructure (e.g., the policies and structures that lead to unethical behavior, such as botched coercive reward systems), environmental pressures (e.g., failing industries during the COVID-19 pandemic), and, finally, ethical climates and cultures.

Beyond the organizational level, behavioral ethics research stresses the importance of culture to ethical decision making. There are few global standards for ethical decision making,[175] as contrasts between cultures illustrate. What is ethical in one culture may be unethical in another. For example, because bribery is more common in countries such as China, a Canadian working in China may face a dilemma: Should I pay a bribe to secure business if it is an accepted part of that country's culture? Although some companies explicitly address this issue, many do not. Without sensitivity to cultural differences as part of the definition of ethical conduct, organizations may encourage unethical conduct without even knowing it.

Lying

Although lying might depend on both situational characteristics and individual differences, a large volume of research suggests that lying and dishonest behavior are very common.[176] Perhaps one of the reasons we lie is that lying is difficult for others to detect.[177] In more than two hundred studies, individuals correctly identified people who were lying only 47 percent of the time, which is less than what we would expect if they randomly picked people.[178]

One lie detection technique is to study a person's body language, but researchers found that the probability of detecting lying based solely on body language was also less than a random guess. Psychologist Maria Hartwig observed, "The common-sense notion that liars betray themselves through body language appears to be little more than a cultural fiction."[179] For example, one technique used by police officers is based on the theory that people look up and to the right when they lie. Unfortunately, researchers who tested the technique could not substantiate the underlying theory.[180] Still another technique is to study facial expressions. Here again, many researchers could not support the technique with evidence.

Although people often try to justify lying as necessary in certain situations (e.g., job interviews or sales contexts) or because honesty can be difficult,[181] lying is deadly to decision making. Managers—and employees—simply cannot make good decisions when facts are misrepresented and people give false motives for their behaviors. Lying is a big ethical problem as well. From an organizational perspective, using fancy lie-detection techniques and entrapping liars when possible yield unreliable results.[182] The most lasting solution comes from OB, which studies ways to prevent lying by working with our natural propensities to create environments that are not conducive to lying.

An Ethical Choice

Are We as Ethical as We Think We Are?

In the past ten years, corporate scandals seem to be frequent features in the news cycle. These scandals are often large-scale ethical violations, like Wells Fargo employees opening millions of unauthorized bank accounts to meet their sales goals. It is often not until significant offenses like this occur that organizations call for reforms, which primarily target extensive and conspicuous criminal offenses. Generally, everyday unethical behaviors are overlooked. Many studies, however, have detailed the pervasiveness of unethical practices like slightly altering business expenditure reports, stealing office supplies, and conflicts of interest. Although these behaviors may seem trivial, they can create undesirable norms and impair trust within an organization if they are frequent enough. If left uncontrolled, minor violations can eventually escalate, becoming much more severe and with far more significant consequences.

Research in behavioral ethics suggests that a large population segment, as high as more than 50 percent, engages in unethical behavior. These people do not necessarily act with malicious intent. Instead, these individuals have "blind spots," meaning they often do not understand that their behavior is unethical and may have negative consequences. There are also certain situations in which unethical behavior is more likely to occur: Norms about how people should behave are ambiguous, the victim is often not directly visible, and performance goals are unrealistic (as was the case at Wells Fargo). When these conditions are ripe, employees are more prone to committing ethical violations. Research from behavioral ethics offers some recommendations for organizations to prevent this type of behavior:

1. Focus on raising individuals' awareness of behaviors that are unethical and illegal. In situations where employees are not aware of the unethicality, focusing on awareness and clarification can help curb unethical behavior before it happens. Training employees in ethical leadership, awareness of ethical issues, and restraining biases that may promote unethical behavior may help.
2. Communicate to employees that there will be consequences for misconduct. Formal consequences are necessary when employees have deliberately engaged in unethical behavior and are fully aware that it is harmful.
3. Encourage employees to speak up when they observe behavior or practices that might be unethical. Actively encourage whistleblowing by creating channels whereby people can bring to light potential instances of unethical behavior, processes to establish the claims' veracity, and the removal of barriers to whistleblowing (e.g., retaliation).
4. Create formal and informal systems through which everyday unethical behavior can be detected, monitored, and prevented. Formally, this includes hiring practices, onboarding programs, continuous training, performance management systems, decision-making processes, and accountability structures. Informally, this involves crafting an ethical culture by establishing role models for employees to look up to and norms, rituals, and language that provide ethical guidance to employees.[183]

Creativity, Creative Decision Making, and Innovation in Organizations

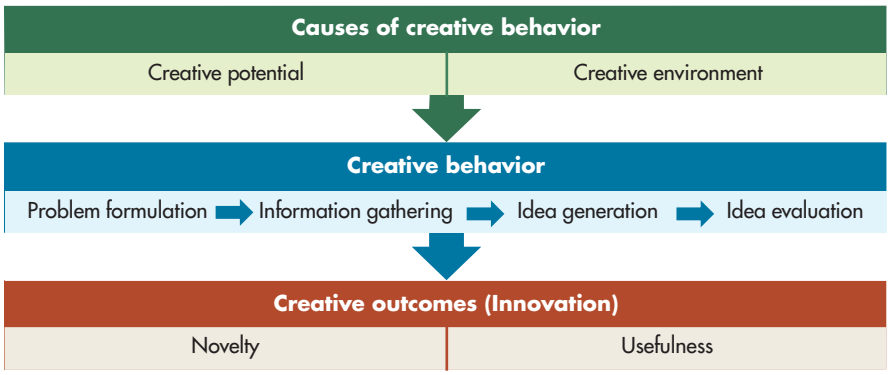
6-7 Describe the three-stage model of creativity.

Although alternatives to solving problems may often be clear or readily available, sometimes a decision maker also needs **creativity**, the ability to produce novel and useful ideas. Novel ideas are different from what has been done before but are appropriate for the problem.

creativity The ability to produce novel and useful ideas.

Creativity allows the decision maker to appraise and understand problems fully, including seeing problems others cannot see. Although all aspects of OB are complex, this is especially true for creativity. To simplify, Exhibit 6-5 provides a three-stage model of creativity in organizations. The core of the model is *creative behavior*, which has both *causes* (predictors of creative behavior) and *effects* (outcomes of creative behavior).

Exhibit 6-5 Three-Stage Model of Creativity in Organizations



Creative Behavior

Creative behavior occurs in four steps, each of which leads to the next:[184]

problem formulation The stage of creative behavior that involves identifying a problem or opportunity requiring a solution that is yet unknown.

1. **Problem formulation.** Any act of creativity begins with a problem that the behavior is designed to solve. Thus, **problem formulation** is the stage of creative behavior in which we identify a problem or opportunity that requires a solution that is yet unknown. For example, Marshall Carbee and John Bennett founded Eco Safety Products after discovering that even paints declared safe by the Environmental Protection Agency (EPA) emitted hazardous chemical compounds. Thus, Eco's development of artist-safe soy-based paint began with identifying a safety problem with paints currently on the market.[185]

information gathering The stage of creative behavior when possible solutions to a problem incubate in an individual's mind.

2. **Information gathering.** Given a problem, the solution is rarely clear at the outset. We need time to learn more and process what we have learned. Thus, **information gathering** is the stage of creative behavior when knowledge is sought and possible solutions to a problem incubate. Information gathering leads us to identifying innovation opportunities.[186] Niklas Laninge of Hoa's Tool Shop, a Stockholm-based company that helps organizations become more innovative, argues that creative information gathering means thinking beyond usual routines and comfort zones. For example, have lunch with someone outside your field to discuss the problem. "It's so easy, and you're forced to speak about your business and the things that you want to accomplish in new terms. You can't use buzzwords because people don't know what you mean," Laninge says.[187]

idea generation The process of creative behavior that involves developing possible solutions to a problem from relevant information and knowledge.

3. **Idea generation. Idea generation** is the process in which we develop possible solutions to a problem from relevant information and knowledge. Curiosity has been found to be a driver of idea generation: When you are curious about something, you are more likely to link earlier ideas or earlier solutions to help solve the current problem.[188] Idea generation has implications for group dynamics. For example, when NASA engineers developed the idea for landing a spacecraft on Mars, they did so collaboratively. Before coming up with the *Curiosity*—an SUV-sized rover that lands on Mars from a sky crane—the team spent three days scribbling potential ideas on whiteboards.[189] Research shows that individual success during idea generation may lead one's coworkers to evaluate and select that individual as a leader, especially if no one else is coming up with good ideas.[190] However, collaborative efforts during idea generation can be a "double-edged sword" for team members, as they can involve higher coordination costs and sharing credit for a successful idea.[191]

4. **Idea evaluation.** Finally, it is time to choose from the ideas we have generated. Thus, **idea evaluation** is the process of creative behavior in which we evaluate potential solutions to identify the best one. Sometimes the method of choosing can be innovative. When Dallas Mavericks owner Mark Cuban was unhappy with the team's uniforms, he asked fans to help design and choose the best uniform. Cuban said, "What's the best way to come up with creative ideas? You ask for them. So we are going to crowd source the design and colors of our uniforms."[192] Generally, you want those who evaluate ideas to be different from those who generate them to eliminate the obvious biases and diffusion of responsibility. First, people often derive quite a bit of self-worth and identity from the ideas they come up. Any potential evaluations threaten these ideas, which leads people to evaluate their own ideas more leniently, in what has been referred to as the *ideator's bias*.[193] Second, although hierarchy can harm the idea generation phase (people feel less free to share ideas), it can be helpful during the idea evaluation phase because authority figures take charge and select the best idea out of the pool. (Without authority, people may be less willing to voice their opinions on which idea to select.)[194]

idea evaluation The process of creative behavior involving the evaluation of potential solutions to problems to identify the best one.

Causes of Creative Behavior

Having defined creative behavior, the main stage in the three-stage model, we now look back to the causes of creativity: creative potential and creative environment.

Creative Potential Is there such a thing as a creative personality? Indeed. While creative genius is rare—whether in science (Neil deGrasse Tyson), the arts (Camae Ayewa [Moor Mother]), or business (Daymond John)—most people have some of the characteristics shared by exceptionally creative people. The more of these characteristics we have, the higher our creative potential. Consider these indicators of creative potential:

1. **Intelligence and creativity.** Intelligence is related to creativity—some research has even shown that some degree of intelligence is necessary in order to be creative.[195] Smart people are more creative because they are better at solving complex problems.[196] However, they may also be more creative because they have greater "working memory"; that is, they can recall more information related to the task at hand.[197] Along the same lines, research indicates that an individual's high need for cognition (desire to learn) and cognitive abilities geared toward updating information is correlated with greater creativity.[198]
2. **Personality and creativity.** The Big Five personality trait of openness to experience (see the chapter on personality and individual differences) correlates with creativity, probably because open individuals are less conformist in action and more divergent in thinking. Other traits of creative people include proactive personality, self-confidence, risk taking, tolerance for ambiguity, and perseverance.[199] Hope, self-efficacy (belief in your capabilities), and positive affect also predict an individual's creativity.[200]
3. **Expertise and creativity.** *Expertise* is the foundation for all creative work. For example, film writer, producer, and director Quentin Tarantino spent his youth working in a video rental store, where he built up an encyclopedic knowledge of movies. The potential for creativity is enhanced when individuals have abilities, knowledge, proficiencies, and similar expertise to their field of endeavor. The expertise of others is important, too. People with larger social networks have greater exposure to diverse ideas and informal access to the expertise and resources of others.[201]

4. **Ethics and creativity.** Although creativity is linked to many desirable individual characteristics, its relationship with ethicality is unclear. Research has demonstrated that people who cheat may be more creative than those who behave ethically. It may be that dishonesty and creativity can both stem from a rule-breaking desire.[202] Some recent research has found that people who tend to have creative personalities (or who are members of more creative teams) tend to be imaginative concerning moral issues (e.g., able to better envision consequences of their actions) and, as such, are actually *more* ethical.[203]

Creative Environment Most of us have creative potential we can learn to apply, but as important as creative potential is, by itself it is not enough. We need to be in an environment where creative potential can be realized.[204] Perhaps most important is *motivation*. Intrinsic motivation, or the desire to work on something because it is interesting, exciting, satisfying, and challenging (discussed in more detail in the chapters on motivation), correlates strongly with creative outcomes.[205] As such, environments should foster employees' motivations to be creative.[206] What other environmental factors affect whether creative potential translates into creative behaviors?

First, it is valuable to work in an environment that rewards and recognizes creative work.[207] A study of health care teams found that team creativity translated into innovation only when the climate actively supported innovation.[208] The organization should foster the free flow of ideas, including providing fair and constructive judgment. Freedom from excessive rules encourages creativity; employees should have the freedom to decide what work is to be done and how to do it. One study revealed that both structural empowerment (in which the structure of the work unit allows sufficient employee freedom) and psychological empowerment (which lets the individual feel personally enabled to decide) were related to employee creativity.[209] However, other research found that creating a competitive climate where achievement is valued at any cost stymies creativity.[210]

Second, certain job characteristics can foster creativity. Specifically, jobs that are complex, autonomous, and have clear role expectations for innovation are related to innovative behavior—these job characteristics can be especially important in inspiring creative behavior.[211] Managers and leaders play a large role in establishing these characteristics as a part of the organizational infrastructure and culture. They may be able to heighten innovation when resources are limited by encouraging employees to find resources for their novel ideas and by giving direct attention to appropriate tools when resources are plentiful.[212] Managers also serve an important role in encouraging employees to share knowledge and information with one another. When managers link teams to additional information and resources, radical creativity (introducing creative ideas that break the status quo) is more likely.[213] The weaker ties between team members and manager networks may have more impact on creativity than the direct, stronger ties that team members have with their own networks because the weaker sources provide more divergent thinking.[214]

As we will learn in the chapter on teams, more work today is being done in teams, and many people believe diversity will increase team creativity. Past research has suggested that the effect of team diversity depends on which type of diversity we are talking about (surface versus deep-level diversity; see the chapter on diversity). Although surface-level diversity is unrelated to team creativity, deep-level diversity is related to higher levels of team creativity, especially when tasks are interdependent and team members are collocated.[215] Leadership might make the difference. Meta-analyses of the effect of leadership on both team and follower

creativity suggest that transformational and empowering leadership (see the chapter on leadership) are positively related to creativity.[216] These leaders enhance follower empowerment, leader–member exchange, trust, knowledge sharing, and motivation to be creative and establish climates for creativity.[217]

What is the role of culture? Although a recent nation-level study suggests that countries scoring high on Hofstede's culture dimension of individuality (see the chapter on diversity) are more creative,[218] later work suggested that it is more the *collection* of cultural characteristics that influences creativity, such as collective motivational and skill-based, creativity-relevant competencies present in the culture.[219]

Creative Outcomes (Innovation)

The final stage in our model of creativity is the outcome. Creative behavior does not always produce *innovation*, or a creative outcome. An employee might generate a creative idea and never share it. Management might reject a creative solution. Teams might squelch creative behaviors by isolating those who propose different ideas. Many people may have a bias against accepting creative ideas because ideas create uncertainty. When people feel uncertain, their ability to see any idea as creative is blocked.

We can define *innovations* as ideas or solutions judged to be novel and useful by relevant stakeholders. Novelty itself does not generate an innovative outcome if it is not useful. Thus, "off-the-wall" solutions are innovative only if they help solve the problem. The usefulness of the solution might be self-evident (the function of an iPad), or it might be considered successful only by the stakeholders initially.[220]

An organization may harvest many creative ideas from its employees and call itself innovative. However, as one expert stated, "Ideas are useless unless used." Soft skills help translate ideas into results. One researcher found that, in a large agribusiness company, creative ideas were most likely to be implemented when an individual was motivated to translate the idea into practice—and had strong networking ability.[221] Furthermore, data from more than one hundred studies conducted in forty-two countries suggests that family-owned businesses are better equipped to translate creative ideas into useful innovations, likely due to the strong relational ties between members.[222] These studies highlight an important fact: Creative ideas do not implement themselves; translating them into innovative outcomes is a social process that requires utilizing other concepts addressed in this text, including power and politics, leadership, and motivation.

Summary

A great deal of what goes on around us is attributable to differences in the decisions we make and how we perceive things in the working world. People make sense of other people, groups, things, events, ideas, and so on—and the organizational or team contexts affect these sensemaking processes. Furthermore, we make sense of what happens and make attributions regarding which forces are responsible for people's circumstances and behavior. These processes are wrought with many errors and biases in our perception. Why? Because the world is so complex, our minds need to take shortcuts to make sense of what goes on around us efficiently. Unfortunately, these errors and biases trickle into many human resources (HR) processes relevant to OB, such as performance appraisal, promotion decisions, recruitment, and selection. HR processes become infused with error and bias because our perception is inextricably linked to our understanding of work problems and our decisions to solve those problems.

Although we often assume that we are making decisions rationally, the truth is that forces beyond our control often bound our rationality. Instead, we often rely on our intuition, or gut feelings, when making decisions. Armed with an understanding of perception and decision making, students of OB can enter the work world with knowledge of what it takes to make ethical decisions and foster innovation in organizations.

Implications for Managers

- Behavior follows perception. To influence behavior at work, assess how *people* perceive their work, understand how the *environment* affects their perceptions, and examine how *you* perceive other people. Often behaviors we find puzzling can be explained by understanding the initiating perceptions.
- When judging others' (e.g., clients, coworkers) behavior, be wary of jumping to conclusions about why they behave the way they do (or why certain things happen to them). Recognize that your perception of what causes their behavior, such as internal or external forces, can cause you to come to flawed conclusions about them.
- Make better decisions in recruitment, selection, and performance appraisal by recognizing perceptual errors, heuristics, and biases in decision making. Learning about these problems does not always prevent us from making mistakes, but it does help. You can also leverage technology as an aid to reduce perceptual errors.
- Adjust your decision-making approach by recognizing constraints on your decision making and understanding whether some other factor might be affecting your perception at the moment. For instance, your personality traits and other individual differences, as well as the organizational context, may be influencing how you see the problem.
- Be flexible in your approach to solving problems. Know the situations in which rational analysis is preferable and which situations may require quick, intuitive decisions. Understand that forces beyond our control bound our rationality. It is our responsibility to navigate the problem space to select the right strategy given the problem.
- Use a common language of consequences, responsibilities, duties, and rights when considering ethical dilemmas you may face. Ask yourself questions about whether your behavior would result in the greatest good for the greatest number of people or infringes upon others' rights or if you have a responsibility or duty to behave in a certain way.
- Try to enhance your creative process and foster an environment where creativity is encouraged. To solve a problem creatively, formulate the problem, gather information on it, generate ideas on how to solve the problem, and evaluate those ideas. Try to remove work and organizational barriers that might impede creativity, and nurture an atmosphere that rewards creativity and innovation. Consider employees' and coworkers' creative potential when delegating creative tasks.

Implicit Assessment

POINT

As mentioned earlier in this chapter, some decisions are made intuitively—they are made nonconsciously, quickly, and emotionally in the moment. So isn't it likely that we may be acting prejudicially toward others without even realizing it?

Project Implicit, an initiative at Harvard started by Tony Greenwald, Mahzarin Banaji, and Brian Nosek, sought to uncover hidden biases that are outside our conscious awareness. Much of this research has used the Implicit Association Test (IAT), which successfully enabled researchers to examine how quickly people make prejudicial associations (e.g., Black and negative or White and positive) versus nonprejudicial associations (e.g., Black and positive or White and negative). The differences between decision speeds (in milliseconds) for these two associations provides an estimate of one's prejudice or bias.

The IAT has been very helpful in furthering research on nonconscious decision making and prejudice, suggesting that "milliseconds matter" in understanding nonconscious, intuitive behavior. On average, data from millions of people participating in Project Implicit research over the course of decades has revealed potential subconscious biases in a number of domains, including age, religion, gender identity, and race, among other areas.

The IAT has helped us understand that people prefer women over men and mothers over fathers implicitly, but as soon as women are judged within a "male" domain, the preferences shift: People tend to prefer male authority figures and leaders over female ones. A 2009 meta-analysis of nearly 15,000 people found that the IAT was moderately related to predicting future prejudiced judgments, behaviors, and physiological indices.

COUNTERPOINT

Although intuition certainly plays a role in decision making, can a test actually tell us whether we are prejudiced? Is the number of milliseconds it takes to select an association between two concepts enough to tell someone that they are biased? This link between the IAT and biased behavior has long been questioned by scholars, notably Hart Blanton.

Beyond the ethical implications of using a test to label someone as prejudiced or biased, which Emily Bazelon of *The New York Times* has likened to taking our societal discussions of bias and changing them "from a psychological observation to a political accusation," Blanton notes that there are many issues with the measure itself: "The IAT isn't even predicting the IAT two weeks later… how can a test predict behavior if it can't even predict itself?" One study has also determined that it is impossible to separate true variability in the IAT versus variability due to faking (when people are instructed to fake the IAT).

In an updated meta-analysis published in 2015, Blanton and colleagues found that the IAT does very little to predict behavior, perceptions, policy preferences, nonverbal behaviors, and response times (although sometimes small effects can have societally large effects); the only element that the IAT seemed to predict moderately well was brain activity of some kind. Blanton has also sparked debate by reanalyzing data from influential IAT tests from the earlier 2000s and found that some of the findings were smaller than anticipated and have changed substantially because of outliers and other factors (although this was debated by the original authors).[223]

CHAPTER REVIEW

QUESTIONS FOR REVIEW

6-1 What are the factors that influence our perception?

6-2 What is attribution theory?

6-3 What is the link between perception and decision making?

6-4 How is the rational model of decision making different from bounded rationality and intuition?

6-5 How do individual differences and organizational constraints influence decision making?

6-6 What are the three ethical decision criteria, and how do they differ?

6-7 What are the parts of the three-stage model of creativity?

APPLICATION AND EMPLOYABILITY

Our perception is our first window into the world—it gives us a sense of the world around us, with whom we are interacting, where we are, and what we should or should not be doing. These perceptions are instrumental in guiding our decision making. In the world of business, the prevailing assumption is that we make decisions rationally. However, additional research counters this assumption because perceptions and biases impose a limit on decision quality. Becoming aware of your own biases and decision-making errors can help you make more informed decisions and, in turn, make you more employable. This understanding can help you improve not only your ethical decision making but also your creative performance. In this chapter, you developed your critical thinking, creativity, and self-management skills by examining the role of attributions in CSR, challenging the assumption that all stereotypes are negative, uncovering how our personality influences our propensity to behave (un)ethically, and examining the feasibility of measuring prejudicial intuitions. In the section that follows, you will continue to develop these skills, along with your communication and collaboration skills, by collaboratively solving a problem with classmates, confronting cheating as a decision, and evaluating the perils of collaboration overload in organizations.

EXPERIENTIAL EXERCISE Bringing Life to a Food Desert

Imagine you and your partner are leaders in a community commonly referred to as a "food desert." A food desert is an area where it is difficult to find and afford quality, fresh food. Instead, the most accessible food is unhealthy, fast food. Your goal is to develop a creative solution to this problem facing your community using the four steps of creative behavior:

- Problem formulation. Explicitly identify a problem for which a solution is currently unknown.
- Information gathering. Research the problem to assist in developing solutions.
- Idea generation. Develop possible solutions to the problem based on the context, information, and knowledge of the problem.
- Idea evaluation. Choose from the ideas generated by evaluating the solutions to determine which one is best.

Questions

6-8. What factors do you believe influenced your ability to develop creative solutions?

6-9. Did you face any obstacles when trying to develop creative solutions? If so, were you able to overcome these obstacles?

6-10. Do you think everyone is capable of being creative, or do you think certain people are more predisposed to being creative in an organization? Explain.

ETHICAL DILEMMA Max's Burgers: The Dollar Value of Ethics

Max's Burgers is an emerging American fast-food chain with franchised outlets across the globe. When Nassar Group, a well-diversified conglomerate operating in Dubai, bought the rights to manage Max's Burgers' network of franchised outlets in Dubai, the move was a personal project of Houssam Nassar, the Group's managing director and a businessman with an excellent reputation.

Dubai's fast-food market is overwhelmed with franchised restaurants. Meat quality at Max's Burgers, however, was lower than the standards set by franchisors. This was all about to change, because Nassar did not intend to jeopardize his reputation and image. Accordingly, as the new operator of Max's Burgers outlets, he issued a directive instructing the warehouse manager to decline any frozen meat shipment that did not comply with the franchisor's set standards.

A few weeks after Nassar Group took over the management of Max's Burgers, a frozen meat shipment was delivered to the Max's Burgers main warehouse. Upon measuring the temperature of the meat, the warehouse manager found that it was a few degrees outside acceptable limits. In terms of governmental regulations, a couple of degrees' difference in temperature would present no risk to customers' health; however, such a difference could have a minor effect on the taste and texture of the meat.

Prior to the change of management, and for many years before, the warehouse manager had had no second thoughts about accepting such a shipment: no food poisoning claim was ever filed against Max's Burgers, and taste inconsistencies never bothered anyone enough to complain. Further, the company supplying the meat to Max's Burgers was owned by a relative of the warehouse manager.

With the new directive in place, however, the warehouse manager was unsure about his decision. Even though he knew that Nassar would have no way of finding out that the received meat was noncompliant, he wasn't sure about his decision this time around.[224]

Questions

6-11. Does the decision to accept or refuse the frozen meat shipment call for ethical or legal considerations? Why?

6-12. Identify the stakeholders who will be influenced by the decision to accept or refuse the frozen meat shipment.

6-13. What type of decision-making framework would you advise the warehouse manager to adopt in order to help him reach an optimal decision? How will your suggestion help?

CASE INCIDENT Warning: Collaboration Overload

"Regardless of what you're giving us, we're dying by e-mail," an executive told Jamie McLellan, a CTO at an advertising agency. McLellan invested in many different collaboration tools with the goal of helping the employees work more efficiently. Many organizations have taken this same approach through open-plan offices, such as those in many knowledge-intensive companies like Facebook, which has a notorious 430,000-square-foot open office space. Among these tools, employees can use them to create internal team websites, chat, and share documents. However, almost everyone tended to stick to what they knew and were used to using: e-mail, with the employees sending and receiving between 3,000 to 5,000 e-mails per month.

This influx of various collaboration mechanisms has led to a real problem for organizations: collaboration overload. According to data spanning two decades, employees spend about 50 percent or more of their time collaborating with others. Although this may seem beneficial on the surface, this pattern has many drawbacks that are not readily apparent. For one, nearly 20 to 35 percent of collaborations that actually add value come from only 3 to 5 percent of employees. Unfortunately, people become known for their capabilities and willingness to help, and thus the scope of their positions increases in a phenomenon known as escalating citizenship. Another major problem with collaboration overload is that time and energy spent collaborating with others (rather than working on one's work) translates to depleted personal resources.

Collaboration overload can have drastic effects on decision making within organizations. By increasing the number of collaboration tools and therefore increasing communication complexity, the number of people involved in decision making increases exponentially, requiring more meetings, e-mails, and instant messages. Although there is much evidence that suggests we may need to tone down the richness, variety, and depth of our communication due to how little "deep" work can get done, there seems to be an escalation of commitment to the cult of collaboration, with not many offices agreeing to become at least partially unplugged.

Questions

6-14. In what ways do you think collaboration overload can have an impact on decision making?

6-15. What biases do you think play into managers continued use of collaboration tools and modes?

6-16. How does collaboration overload (e.g., requiring employees to use multiple collaboration mechanisms or become employed in open-office environments) compare to the three ethical decision criteria (i.e., utilitarianism, liberties/rights, and deonance) discussed in this chapter?[225]

7

Motivation Concepts



Source: Darron Cummings/AP/Shutterstock

LEARNING OBJECTIVES

After studying this chapter, you should be able to:

7-1 Describe the three key elements of motivation.

7-2 Compare the classic theories of motivation.

7-3 Contrast the content-based theories of motivation, including self-determination theory, regulatory-focus theory, and job engagement theory.

7-4 Understand the differences between the context-based theories of motivation: reinforcement theory and social learning theory.

7-5 Compare the process-based theories of motivation: expectancy theory, goal-setting theory, and self-efficacy theory.

7-6 Describe the forms of organizational justice, including distributive justice, procedural justice, informational justice, and interactional justice.

7-7 Describe how the contemporary theories of motivation complement one another.

Employability Skills Matrix (ESM)

	Myth or Science?	An Ethical Choice	Point/ Counterpoint	Toward a Better World	Experiential Exercise	Ethical Dilemma	Case Incident
Critical Thinking & Creativity	✓	✓	✓		✓	✓	✓
Communication	✓		✓	✓	✓		
Collaboration				✓	✓		
Self-Management					✓		✓
Social Responsibility	✓	✓	✓	✓		✓	
Leadership	✓	✓	✓	✓	✓	✓	✓
Career Management	✓						

ENGAGING EMPLOYEES AT SALESFORCE

Eighty-five percent of employees worldwide are actively disengaged or not engaged in their jobs. How do some companies maintain high job engagement levels while most other organizations struggle so much to do so? Salesforce is one such organization, included on Fortune's "100 Best Companies to Work For" list for the twelfth year in a row. Part of Salesforce's high workforce engagement levels may stem from its unique company culture and employee benefits. Salesforce differentiates itself from other organizations with exceptionally generous paid time off and leave policies, including fantastic child care assistance perks, commuter benefits, and career development (i.e., Salesforce will reimburse 100 percent of all college costs up to a limit for job-related courses).

The founders of Salesforce were intentional about developing a company culture that would directly foster job engagement and motivation. As a result, they prioritize employee well-being through dedicated mindfulness zones in offices and a Wellness Reimbursement Program. Employees receive $100 each month to use toward their well-being in whichever way they please, from enrolling in fitness classes to seeking nutrition counseling. Beyond offering innovative perks, Salesforce can also sustain high job engagement by continuously monitoring engagement levels. All Salesforce employees complete engagement surveys twice a year, but Salesforce does not withhold employees' data. Employees are able to access the data from these surveys through a company app. The company is very transparent about its assessment practices. Through data sharing, employees are encouraged to take responsibility for the work environment and take a proactive role in shaping the culture.

The company also takes a somewhat unconventional approach by providing the same amount of transparency to its managers. All employees can access the data on their *manager's* engagement levels and team performance. The goal is not to publicly discredit the managers and their teams but rather to determine which management practices are working and which ones are not. This transparency helps the organization transform abstract strategies that encourage engagement and motivation into specific behaviors and policies. For example, explicitly recognizing that work-life balance prevents burnout is not enough. Companies need to help employees find this balance through their benefits, policies, practices, and management.

Salesforce offers training for teams exhibiting low engagement levels, including "Fearless Teaming," which focuses on cultivating "psychological safety" or an environment in which people feel comfortable taking risks. Jody Kohner, senior vice president of employee engagement at Salesforce, suggests that employees are empowered to do their best work when they feel comfortable taking risks. Employees and managers are also empowered to maximize the fit between employees and their teams. For instance, Salesforce launched an internal mobility program that empowers employees to switch teams if they do not feel like they fit with their current team. The organization's investment in these initiatives has paid off as it can retain employees for longer and continue to be a successful, profitable company.[1]

Motivation is a powerful force. It can drive employees through encouragement and reward to accomplish challenging goals. However, it can also prompt employees to cheat when they experience injustice or are threatened by unattainable goals. Navigating and predicting these forces becomes a challenge to both workers and managers. Despite the challenges, knowing more about motivation theories can help increase an understanding of how motivation may operate and how employees become motivated.

Millions of people each year spend money in the hopes that they will become more "motivated." In the United States alone, self-improvement and motivational services is an $11 billion market that is expected to grow 5.1 percent on average until 2027.[2] Motivation is also one of the most frequently researched topics in organizational behavior (OB),[3] and full-time OB practitioners (e.g., industrial-organizational psychologists, management consultants, human resource professionals) list it as one of the top most-needed areas for continued research in the field.[4] Beyond interest in the topic, people do appear to be generally unmotivated at least for a part of the workweek. In one survey, 69 percent of workers reported wasting time at work every day, and nearly a quarter said they waste between thirty and sixty minutes each day. How? Usually by surfing the Internet (checking the news and visiting social network sites) and chatting with coworkers.[5] Although times change, the problem of motivating a workforce stays the same.

In this chapter, we will review the basics of motivation, assess motivation theories, and provide an integrative model that fits these theories together. In the next chapter, we will apply what we know about motivation to solve motivation problems in the workplace.

Motivation Defined

7-1 Describe the three key elements of motivation.

The same student who struggles to dedicate time to read an assigned book for class may devour a *New York Times* best seller in a day. The difference lies in levels of motivation.

We define **motivation** as the processes that account for an individual's *intensity*, *direction*, and *persistence* of effort toward attaining a goal.[6] While general motivation is concerned with effort toward *any* goal, we will narrow the focus to *organizational* goals. Levels of motivation can vary from moment to moment and can also be meaningful individual differences (see the chapter on personality and individual differences). In other words, motivation can take form as both a personality trait and a temporary state.

motivation The processes that account for an individual's intensity, direction, and persistence of effort toward attaining a goal.

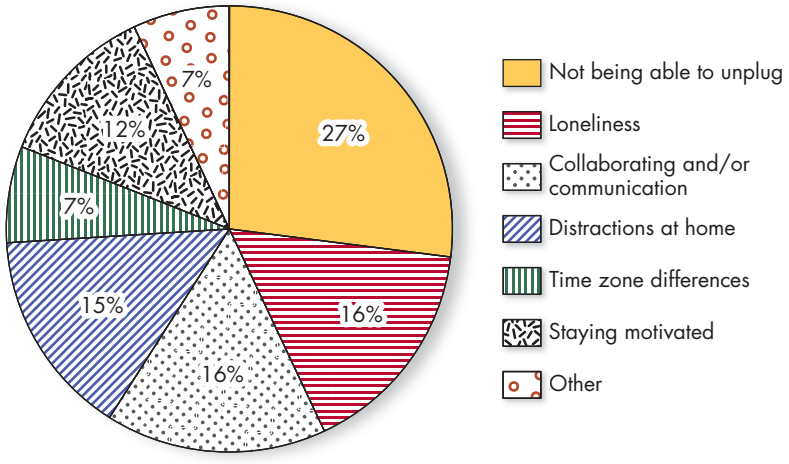
Intensity describes how hard a person tries. This is the element most of us focus on when we talk about motivation. However, high intensity is unlikely to lead to favorable job performance outcomes unless the effort is channeled in a *direction* that benefits the organization. Effort directed toward and consistent with the organization's goals is the kind of effort organizations should be seeking to improve. Finally, motivation has a *persistence* dimension. This measures how long a person can maintain effort. Motivated individuals work intensely on an appropriate task long enough to achieve their goals.

Many classic and contemporary theories of motivation focus on employee needs as goals to attain and describe whether their organizations, jobs, and work fulfill those needs. Other theories portray goals as means toward organizational ends, such as the fulfillment of job duties and responsibilities. Although we discuss remote work to a greater extent in the next chapter on motivation applications, the issues facing remote workers reflect both perspectives. As shown in the OB Poll,

OB POLL

Is a Lack of Motivation the Biggest Issue Remote Workers Face?

What is your biggest struggle with working remotely?



Source: Based on "The 2021 State of Remote Work," *Buffer*, January 4, 2021, https://buffer.com/2021-state-of-remote-work

remote workers' biggest struggles include the difficulty of fulfilling people's need to interact with other people as well as obstacles that thwart goal attainment, like household distractions and time zone differences. In the next section, we describe more classic theories of motivation, which portray motivation as a process involving people's psychological needs and the extent to which work meets or neglects those needs.

Classic Theories of Motivation

7-2 Compare the classic theories of motivation.

Three theories of employee motivation formulated during the 1950s are considered to be classics in the study of motivation. They represent a foundation of motivation theory, with many practicing managers still using their terminology. However, now they are of questionable validity (as we will discuss), and as evidence-based OB practitioners, we should carefully and cautiously consider their use when compared with more contemporary theories, discussed later in this chapter.

Hierarchy of Needs Theory

hierarchy of needs Abraham Maslow's hierarchy of five needs—physiological, safety, social, esteem, and self-actualization.

The best-known theory of motivation is Abraham Maslow's **hierarchy of needs**,[7] which hypothesizes that within every human being there is a hierarchy of five needs humans are motivated to meet. A sixth need has been proposed for a highest level—intrinsic values—which is said to have originated from Maslow, but it has not gained widespread acceptance.[8] The original five needs are:

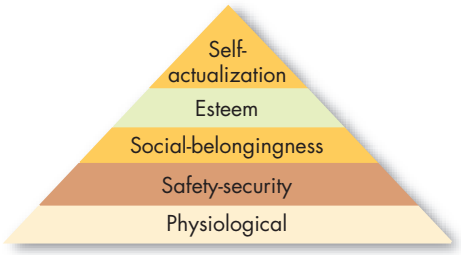
1. **Physiological.** Hunger, thirst, shelter, and other bodily needs.
2. **Safety.** Security and protection from physical and emotional harm.
3. **Social-belongingness (originally love).** Affection, love, belongingness, acceptance, and friendship.
4. **Esteem.** Internal factors such as self-respect, autonomy, and achievement as well as external factors such as status, recognition, and attention.
5. **Self-actualization.** Drive to become what we can become; includes growth, achieving our potential, and self-fulfillment.

According to many interpretations of Maslow's work,[9] as each need becomes well satisfied, the next one becomes dominant. This has led to the popularized depiction of the hierarchy as a pyramid or a ladder. Maslow himself, however, merely outlined the need categories and suggested that some may take precedence depending upon the situation.[10] We depict the hierarchy as a pyramid in Exhibit 7-1 because this is its best-known presentation, but it is important to recognize that Maslow did not depict the hierarchy of needs in this way. Maslow's theory has broadly received long-standing recognition, particularly among practicing managers. Perhaps the broad recognition is because it is intuitively logical and easy to understand, especially in its ladder or pyramid form. Unfortunately, however, most research does not support its validity, and it has not been frequently researched since the 1960s.[11] Nonetheless, it is thus important to be aware of the prevailing public acceptance of the hierarchy when discussing motivation but also to recognize that psychological needs paint an incomplete portrait of motivation in the workplace.

Two-Factor Theory

Believing an individual's relationship to work is basic and that the attitude toward work can determine success or failure, psychologist Frederick Herzberg wondered, "What do people want from their jobs?" He asked people to describe, in detail, situations in which they felt exceptionally *good* or *bad* about their jobs.

Exhibit 7-1 Maslow's Hierarchy of Needs



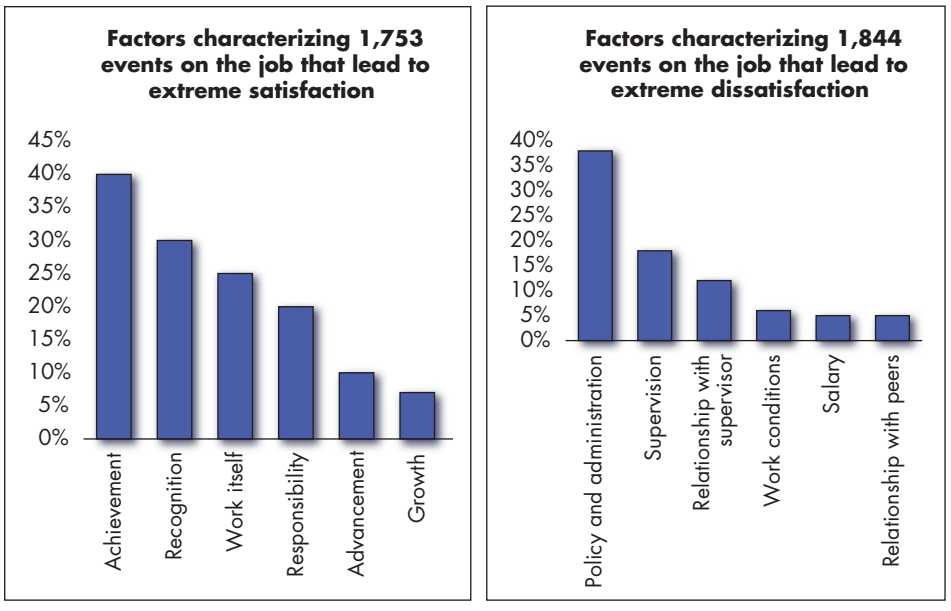
Source: Based on H. Skelsey, "Maslow's Hierarchy of Needs—the Sixth Level," *Psychologist* (2014): 982–83.

The responses differed significantly and led Hertzberg to his **two-factor theory** (also called *motivation-hygiene theory*, but this term is not used much today).[12] Two-factor theory is inherently tied to job satisfaction (see the chapter on job attitudes) and expresses motivation in terms of intrinsic and extrinsic factors that impact job satisfaction.

two-factor theory A theory that relates intrinsic factors to job satisfaction and associates extrinsic factors with dissatisfaction. Also called motivation-hygiene theory.

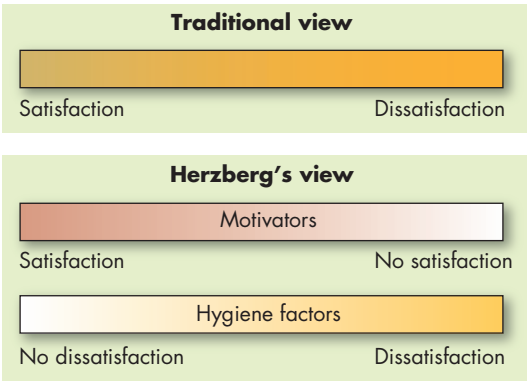
Under two-factor theory, the factors that lead to job satisfaction are separate and distinct from those that lead to job dissatisfaction. As shown in Exhibit 7-2, intrinsic factors such as advancement, recognition, responsibility, and achievement seem related to job satisfaction. Respondents who felt good about their work tended to attribute these factors to their situations, while dissatisfied respondents tended to cite extrinsic factors, such as supervision, pay, company policies, and work conditions.

Exhibit 7-2 Comparison of Satisfiers and Dissatisfiers



Source: Based on Harvard Business Review, "Comparison of Satisfiers and Dissatisfiers," An exhibit from *One More Time: How Do You Motivate Employees?* by Frederick Herzberg, January 2003. Copyright © 2003 by the Harvard Business School Publishing Corporation. All rights reserved.

Exhibit 7-3 Contrasting View of Satisfaction and Dissatisfaction



To Herzberg, the data suggest that the opposite of satisfaction is not dissatisfaction, as was traditionally believed (see Exhibit 7-3). Removing dissatisfying characteristics from a job does not necessarily make the job satisfying; managers would be placating rather than motivating employees. Herzberg proposed a dual continuum: The opposite of "satisfaction" is "no satisfaction," and the opposite of "dissatisfaction" is "no dissatisfaction."

hygiene factors Factors—such as company policy and administration, supervision, and salary—that, when adequate in a job, placate workers and limit job dissatisfaction.

Conditions such as quality of supervision, pay, company policies, physical work conditions, relationships with others, and job security are **hygiene factors**. When they are adequate, people will not be dissatisfied; neither will they be satisfied. If we want to *motivate* people on their jobs, we should emphasize factors associated with the work itself or with outcomes directly derived from it, such as promotional opportunities, personal growth opportunities, recognition, responsibility, and achievement. These are the characteristics people find intrinsically rewarding.

The two-factor theory has not been well supported in research. Criticisms center on Herzberg's original methodology and his assumptions, such as how the participants may be biased in thinking back to times when they felt good or bad about their jobs.[13] Furthermore, if hygiene and motivational factors are equally important to a person, both should be capable of motivating. Regardless of the criticisms, Herzberg's theory has been quite influential and has been used in many studies.[14] Most managers worldwide are familiar with its recommendations.

McClelland's Theory of Needs

Imagine that you are a sales manager in a well-known mountaineer outfitting company, reviewing the bonus memo you received earlier in the day. If you meet the easier, level 1 sales goal, you will get a $2,000 bonus. If you meet the level 2 sales goal (which only 80 percent of the people who attempt actually attain), you will get a $4,000 bonus. Level 3 pays $8,000, but only half the people who try can attain it. Finally, Level 4 pays $32,000, but it is almost impossible to achieve. Which would you try for? If you selected level 3, you are likely a high achiever.

McClelland's theory of needs A theory that achievement, power, and affiliation are three important needs that help explain motivation.

McClelland's theory of needs, unlike Maslow's hierarchy, suggests that needs are more like motivating factors than prerequisites for survival.[15] In McClelland and colleagues' theory, there are three primary needs:

need for achievement (nAch) The need to excel or achieve to a set of standards.

- **Need for achievement (nAch)** is the need to excel or achieve to a set of standards.

- **Need for power (nPow)** is the need to make others behave in a way they would not have otherwise.
- **Need for affiliation (nAff)** is the need to establish friendly and close interpersonal relationships.

need for power (nPow) The need to make others behave in a way in which they would not have behaved otherwise.

need for affiliation (nAff) The need to establish friendly and close interpersonal relationships.

McClelland and subsequent researchers focused most of their attention on nAch.[16] In general, high achievers perform best when they perceive their probability of success as 0.5—that is, a fifty-fifty chance. Similarly, they dislike low odds (high probability of success) because then there is no challenge to their skills. Based on prior nAch research, we can predict some relationships between nAch and job performance. First, when employees have a high level of nAch, they tend to exhibit more positive moods and be more interested in the task at hand.[17] Second, employees high on nAch tend to perform very well in high-stakes conditions on the job, like work walkthroughs or sales encounters.[18]

The other needs within the theory have also been empirically supported. First, the nPow concept has research support, but it may be more familiar to people in broad terms than in relation to the original definition.[19] We will discuss power much more in the chapter on power and politics. Second, the nAff concept is also well established and accepted in research—for example, one study of 145 teams suggests that groups composed of employees with a high nAff tend to perform the best, exhibit the most open communication, and experience the least amount of conflict (compared with the other needs).[20] Additional research suggests that our individual differences (discussed in the chapter on personality and individual differences) may affect whether we can satisfy these needs. For example, a high degree of neuroticism can prevent one from fulfilling the nAff, whereas agreeableness supports fulfillment of this need; interestingly, extroversion had no significant effect.[21] Furthermore, some evidence suggests that women may be more likely to have more nAff needs then men.[22]

The degree to which we have each of the three needs is difficult to measure, and therefore the theory is difficult to put into practice. A behavior may be directed at satisfying many different needs, and many different behaviors may be directed at satisfying one given need, making needs difficult to isolate and examine.[23] Therefore, the concepts are helpful, but they are not often used objectively.

Contemporary Theories: A Primer

Although these three classic theories are quite common, they do not represent the universe of influential motivation theories in management. In fact, a number of distinct motivation theories have made a substantial contribution, helping illuminate the nature of motivation in organizations. Some of these theories may also be considered "classics" (e.g., behaviorism, expectancy theory), while others may be relatively more modern. Regardless, these theories share the fact that they are still the focus of (mostly supportive) research and practice in OB to this day, which makes them "contemporary" theories in our view. These "contemporary theories" represent the latest thinking in explaining employee motivation. This does not mean they are unquestionably right, however.

To help categorize these motivation theories, it might be helpful to break down the core components of these theories. Researchers, for instance, have classified motivation theories into three categories: (a) *content*, (b), *context*, and (c) *processes*.[24] The *content* category is primarily concerned with fundamental motives and individual differences in motivation states common to all people. This category includes self-determination theory, regulatory-focus theory, and job engagement theory. The *context* category involves sources of motivation that

stem from the contexts people find themselves in. For instance, the theories of reinforcement, behaviorism, and social learning (which some would also consider to be classics) would fit in here. Next, the *process* category involves the direct motivation theories that focus on the process of choosing and striving toward goals. This includes expectancy, goal-setting, and self-efficacy theories. Although some may correctly suggest that justice and organizational justice are fundamental motives and would fit into the "content" category, given their importance to ethics in organizations, we close our discussion of motivation theories by devoting an entire section to them.

Contemporary Theories of Motivation: Content-Based

7-3 Contrast the content-based theories of motivation, including self-determination theory, regulatory-focus theory, and job engagement theory.

Self-Determination Theory

Think of what led you to choose your college major. Did you feel like you had a choice in the matter? Did you feel free to explore and choose a major that was right for you? Were others pressuring you to choose a major? Did you feel like you had the support of your parents, friends, and teachers? These questions are all relevant to a self-determination theory (SDT) perspective on motivation.[25]

self-determination theory A meta-theory of motivation at work that is concerned with autonomy, intrinsic motivation, extrinsic motivation, and the satisfaction of psychological work needs.

Self-determination theory (SDT) proposes that employees' well-being and performance are influenced by the nature of their motivation for certain job activities.[26] For instance, a sense of choice over what they do, how motivating the task is in and of itself, how rewards influence motivation, and how work satisfies psychological needs are all fundamental components of SDT. The theory is actually a *meta-theory* (or a collection of related theories behind a common theme) and is widely used in psychology, management, education, and medical research. A key tenant of SDT is that motivation can be either *autonomous* (e.g., freely chosen) or *controlled* (e.g., as a result of others' pressure or direction). Supporting SDT, data from approximately 40,000 schoolteachers showed that autonomous motivation had pronounced effects on teacher well-being, stress, and teaching quality.[27]

Cognitive Evaluation Theory "It's strange," said Jordan. "I started work at the Humane Society as a volunteer. I put in fifteen hours a week helping people adopt pets. I loved coming to work. But then, three months ago, they hired me full-time at $11 an hour. I am doing the same work I did before. But I'm not finding it as much fun." Does Jordan's reaction seem counterintuitive?

cognitive evaluation theory A sub-theory of self-determination theory in which extrinsic rewards for behavior tend to decrease the overall level of motivation if the rewards are seen as controlling or reduce their sense of competence.

One explanation can be found in **cognitive evaluation theory (CET)**, a sub-theory that suggests that extrinsic rewards (e.g., pay) reduce people's intrinsic interest in a task.[28] When people are paid for work, it feels less like something they *want* to do and more like something they *must* do. For example, if a computer programmer values writing code out of a love for solving problems, a bonus for writing a certain number of lines of code every day could feel coercive, and the programmer's intrinsic motivation could suffer.

CET suggests that some caution in the use of extrinsic rewards to motivate is wise and that pursuing goals from intrinsic motives (such as a strong interest in the work itself) is better for sustaining motivation. Similarly, CET suggests that providing extrinsic incentives may, in many cases, undermine intrinsic motivation. In support, research confirms that intrinsic motivation contributes to the quality of work, while incentives contribute to the quantity of work. The effects of intrinsic motivation may be weaker when incentives are directly tied to performance (such as a monetary bonus for each call made in a call center).[29]

Self-Concordance Theory Another aspect of self-determination theory is **self-concordance theory**, which considers how strongly people's reasons for pursuing goals are consistent with their interests and core values.[30] People who pursue work goals that align with their interests and values are more satisfied with their jobs, feel they fit into their organizations better, and may perform better.[31] Across cultures, if individuals pursue goals because of intrinsic interest, they are more likely to attain goals, are happier when they do so, and are happy even if they are unable to attain them.[32] Why? Because they feel like they are more competent at accomplishing the goal and feel like they fit better with their organization. When people do not enjoy their work for intrinsic reasons, those who work because they feel obligated to do so can still perform acceptably, though they experience higher levels of strain.[33] On the other hand, even gig workers who work short-term contracts (defined explicitly by rewards) are likely to be motivated if their psychological needs, values, and interests are met by their job.[34] Self-concordance has recently been extended toward research on social responsibility. If your interests in sustainability align with your organization's, you may be more likely to engage in more socially responsible behaviors.[35]

self-concordance The degree to which people's reasons for pursuing goals are consistent with their interests and core values.

Basic Psychological Needs Similar to Maslow's and McClelland's theories, discussed in the prior section, SDT also suggests that there are several basic psychological needs that affect work motivation. When they are satisfied, we tend to be more motivated; when they are frustrated, we tend to be less motivated. *Need for relatedness* is very similar to nAff, discussed in the prior section. However, **need for autonomy** and **need for competence** are two newer needs that correspond with the need to feel in control and autonomous at work and the need to feel like we are good at what we do and proud of it.[37] SDT proposes that, in addition to being driven by a need for autonomy, people seek ways to achieve competence and make positive connections with others. Of all the three needs, however, the need for autonomy is the most important for attitudinal and affective

need for autonomy The need to feel in control and autonomous at work.

need for competence The need to feel like we are good at what we do or proud of it.

Myth or Science?

Work Has to Be Purposeful to Be Motivating

Describing the impact employees' work has on the world has become a familiar strategy that organizations use to inspire employees. For example, Amazon tells employees they are building the future, and Microsoft describes how employees empower individuals and organizations around the world to achieve more. The belief is that if workers view their job as purposeful, organizations can avert demotivation.

However, only a small percentage of employees worldwide, regardless of the company they belong to, appear to be motivated and engaged. While employees who find work meaningful experience significantly higher job satisfaction, a fixation on purpose could have unintended consequences. Although workplaces from IKEA to Microsoft promise meaningful work with a greater purpose, employees' tasks may be routine and disconnected from the inspirational purpose organizations are promising. One survey of seven hundred employees across twenty-two industries demonstrates this disconnect. In this study, all but one employee were able to very quickly identify a trivial or meaningless task that they were required to do regularly for their job. In other words, most employees seem to recognize that their jobs have some tasks that seem mundane or trivial. When their supposed impact and the reality do not match up, employees are more likely to reflect on their work's lack of impact than their actual impact. The result is lower levels of meaning, enjoyment, and motivation.

However, just because some jobs require employees to do more of these routine tasks does not mean these employees have to be any less motivated or engaged. One promising intervention is "superordinate framing." Employees can use this framing tool to think about how seemingly unimportant tasks work to achieve a greater purpose. If organizations invest in helping employees find meaning and purpose in even the most mundane tasks, the payoff could be considerable. Such an intervention may make employees less likely to quit their jobs, more satisfied with their work, and potentially more productive.[36]

outcomes, whereas the need for competence appears to be most important for predicting performance.[38] Also, when using extrinsic rewards, need satisfaction matters less for performance when the rewards are directly salient and clear.[39]

What does all this mean? Managers need to design jobs so that they are motivating, provide recognition, and support employee growth and development. These actions are especially critical for new employee onboarding, as many employees are still deciding whether the job is a good fit for them.[40] Employees who feel autonomous and free in what they choose to do are likely to be more motivated by their work and committed to their employers. Furthermore, employees can satisfy many of these needs through helping others,[41] but do not *pressure* them to help each other![42] As Walmart leadership coach Lucy Duncan suggests about Walmart associates, if you take the time to incorporate SDT in your workplace, "you will be blown away with associate satisfaction."[43]

Regulatory Focus Theory

People differ in the way they regulate their thoughts and behaviors during goal pursuit.[44] Generally, people fall into one of two categories, or *regulatory foci*, though they could belong to both. Those with a **promotion focus** strive for advancement and accomplishment and approach conditions that move them closer toward desired goals. Those with a **prevention focus** strive to fulfill duties and obligations and avoid conditions that pull them away from desired goals. People do not necessarily stick with one strategy permanently, however.[45] It is just as accurate to think of promotion and prevention as potential motivational states workers experience: Sometimes they are more focused on striving for accomplishment, and other times they are more focused on avoiding failure. In general, it is best when employees' regulatory "foci" fit with the demands of the environment—sometimes promotion is preferable, and sometimes prevention is preferable.[46] For instance, messages that fit with citizens' regulatory foci helped encourage compliance of safety behaviors during COVID-19: Promotion-focused people responded better to "what you can do to help you stay healthy," while prevention-focused people responded better to "what you can do to keep America safe."[47]

promotion focus A self-regulation strategy that involves striving for goals through advancement and accomplishment.

prevention focus A self-regulation strategy that involves striving for goals by fulfilling duties and obligations and avoiding failure.

Although you would be right in noting that both strategies are in the service of goal accomplishment, the way they get there is quite different. As an example, consider studying for an exam. You could engage in promotion-focused activities such as reading class materials, or you could engage in prevention-focused activities such as refraining from doing things that would get in the way of studying, such as playing video games.

You may ask, "Which is the better strategy?" Well, the answer depends on the outcome you are striving for. A promotion (but not a prevention) focus is related to higher levels of task performance, citizenship behavior, and innovation; a prevention (but not a promotion) focus is related to safety performance. Ideally, it is probably best to be both promotion- *and* prevention-oriented, depending upon the situation.[48] Employees and managers should set achievable goals, remove distractions, and provide structure for these individuals.[49] The role of the manager is particularly important because they set the tone for the rest of the employees; regulatory focus is contagious and can "trickle down" through the ranks.[50] Furthermore, research suggests that if an individuals' focus matches their supervisor's, they will report higher relationship quality, be more committed to the relationship, and engage in more organizational citizenship behaviors (OCBs) directed at their supervisor to maintain the relationship.[51]

Job Engagement Theory

When Addison reports to work as a hospital nurse, it seems that everything else melts away. Addison becomes completely absorbed in the job: All emotions,

thoughts, and behavior are all directed toward patient care. In fact, Addison can get caught up in work to the point of not even being aware of the time. As a result of this state, Addison is more effective in providing patient care and feels uplifted by the work.

Addison has a high level of **job engagement**, the investment of an employee's physical, cognitive, and emotional energies into job performance.[52] Many also portray job/work engagement as a motivational state characterized by vigorous completion of the work, dedication to the task, and complete absorption in what one is doing,[53] although more research appears to support the "energy-investment" state referenced in this text's definition.[54] If this term seems familiar to you, you are correct—*employee engagement* was a term introduced in the chapter on job attitudes. Why are we introducing it again here? OB scholars actually view engagement in two different ways:[55] One is as a job attitude, a level of enthusiasm people have toward their work. The other is as a motivational state.

job engagement The investment of an employee's physical, cognitive, and emotional energies into job performance.

Practicing managers and scholars have become interested in facilitating job engagement, given that disengaged employees cost U.S. businesses up to $550 billion annually in lost productivity.[56] Job engagement appears to matter for organizations and has been found to predict higher levels of task performance and citizenship behavior.[57] However, as described in the chapter on job attitudes, the construct is partially redundant with job attitudes like organizational commitment.[58]

What makes people more likely to be engaged in their jobs? One review of over 40,000 employees suggests that apart from a proactive personality, conscientiousness, and extroversion, one key trait predicts job engagement: employees' tendencies to experience positive moods and emotions (e.g., positive affectivity; see the chapter on emotions and mood).[59] Context factors also play a role. For example, job characteristics and access to sufficient resources to work effectively, person–organization value fit, and inspirational leadership all affect job engagement as well.[60]

Contemporary Theories of Motivation: Context-Based

7-4 Understand the differences between the context-based theories of motivation: reinforcement theory and social learning theory.

The contemporary content theories of motivation are similar to the classical theories discussed earlier as they primarily concern the fundamental, universal "truths" of motivation that exist across people. They cover content like psychological needs and individual differences in people's motivation. However, they are far from the only noteworthy OB theories on the subject. For instance, a number of other classic theories that emphasize the role of the context or environment on motivation are still used and supported to this day.

Reinforcement Theory

Reinforcement theory argues that reinforcement conditions behavior.[61] Reinforcement theory is *behaviorist,* meaning that it portrays behavior as caused by the context or environment. You need not be concerned, behaviorists would argue, with internal cognitive events (such as the psychological aspects of autonomy, regulatory focus, or job engagement or the process-based theories to come). Instead, what controls behavior are reinforcers—any consequences that, when they immediately follow responses, increase the probability that the behavior will be repeated. For example, when you are given a compliment for doing something at work, you might be more likely to do it again.

reinforcement theory A theory suggesting that behavior is a function of its consequences.

Reinforcement theory ignores the inner state of the individual and concentrates solely on what happens when the individual acts. Although it is not strictly

a motivation theory, it does provide a powerful means of analyzing what controls behavior, and therefore we typically do consider reinforcement when we think about motivation in OB. It is also important to note that strict adherence to reinforcement and behaviorism is not recommended because, clearly, people have rich psychological worlds that impact their motivations and behavior. However, there is a great deal of truth to be found in behaviorist approaches concerning the roles of reinforcement and conditioning on human behavior.

Operant Conditioning/Behaviorism and Reinforcement *Operant conditioning* suggests that people *learn* to behave in a certain way to either get something they want or avoid something they do not want. Reinforcement strengthens a behavior and increases the likelihood it will be repeated. Operant conditioning was part of B. F. Skinner's broader concept of **behaviorism**, which argues that behavior follows stimuli in a relatively unthinking manner. Skinner's form of radical behaviorism rejects feelings, thoughts, and other states of mind as causes of behavior. In short, people learn to associate stimulus and response, but their conscious awareness of this association is irrelevant.[62] For instance, a commissioned salesperson wanting to earn a sizable income finds doing so is contingent on generating high sales, so the salesperson sells as much as possible. Skinner demonstrated that people will likely engage in desired behaviors if they are positively reinforced for doing so; rewards are most effective if they immediately follow the desired response; and behavior that is not rewarded or is punished is less likely to be repeated.

behaviorism A theory stating that behavior follows stimuli in a relatively unthinking manner.

Of course, the linkage can also teach individuals to engage in behaviors that work against the best interests of the organization. Assume your supervisor says that if you work overtime during the next three-week busy season, you will be compensated for it at your next performance appraisal. However, when performance appraisal time comes, you are given no positive reinforcement for your overtime work. The next time your boss asks you to work overtime, what will you do? You will probably decline! Moreover, many of the predictions of the other theories we have discussed so far are at odds with reinforcement theory. Although reinforcement theory would predict that rewards pretty much *always* reinforce behavior, you may recall that cognitive evaluation theory suggests that sometimes rewards can *undermine* behavior by putting a damper on intrinsic motivation.

Social Learning Theory

Individuals can learn by being told or by observing what happens to other people as well as through direct experience. Much of what we have learned comes from watching models—coworkers, supervisors, customers, and so forth. The view that we can learn through both observation and direct experience is called **social learning theory**.[64]

social learning theory The view that we can learn through both observation and direct experience.

Social learning theory, like reinforcement theory, assumes behavior is a function of consequences—but it also clarifies the effects of observation and perception in motivation. People respond to the way they perceive and define consequences, not to the objective consequences themselves. As an essential component of social learning theory, people learn from and "model" their behavior from other people. More specifically, they pay attention to what others are doing, commit and retain what they do to memory, and reproduce the behaviors from memory. Moreover, we are more likely to repeat behaviors in the future if they are also reinforced by the model (e.g., positive feedback from a coach or trainer).

Researchers in organizations have become particularly interested in how supervisors model behavior to their employees and whether the employees actually learn and apply what they observe on the job. This is especially

An Ethical Choice

Motivated by Big Brother

Technology is a great thing. The Internet provides us with instant access to an abundance of information, and smartphones allow us to stay connected with others through e-mail, texting, and tweeting. Yet that ease of connectivity has also given employees the sinking feeling they are being watched—and they are right. But is tracking employees ethical?

Some companies are using technology to track their employees' activities, and some of this tracking is done in the name of science. For example, Bank of America Corp. wanted to learn whether face-to-face interaction made a difference to the productivity of its call center teams, so it asked around a hundred workers to wear badges for a few weeks that tracked their whereabouts. Discovering that the most productive workers interacted most frequently with others, the company scheduled work breaks for groups rather than individually. This is a nice outcome, but how did the monitoring affect the behavior and motivation of the workers?

Other companies track employees to ensure that they are hard at work, which risks completely demotivating some. Accurate Biometrics, for example, uses computer monitoring to oversee its telecommuters. Says Timothy Daniels, VP of operations, looking at websites his employees have visited "enables us to keep a watchful eye without being overinvasive." Currently, around 70 percent of organizations monitor their employees.

Practically speaking, managers may not want to adopt technologies that demotivate their employees through micromanagement. Perhaps more important, though, how can they use monitoring technology ethically in workplace applications? First and foremost, employees should be informed that their activities will be tracked. Second, the purpose of tracking should be made clear to employees. Are workers being monitored to learn something that might help them and the organization as a whole? Or are they being monitored to ensure that they never slack off? Finally, it should be made clear which behaviors are inappropriate. Taking a legitimate work break is different from spending hours on a social networking site. These guidelines should increase the likelihood that monitoring programs are accepted and perceived to be fair.[63]

true concerning leader behaviors like servant leadership (see the chapter on leadership).[65] However, the *way in which work is completed* is also a hot topic: Research has demonstrated that employees are motivated to act pragmatically, autonomously, and even unethically if they observe their supervisors acting that way.[66] Furthermore, many might assume that team members would "pick up the slack" if their leader defaults toward doing nothing. However, this does not appear to be the case: Team members are less likely to fill the leadership gap in teams when the supervisors are not fulfilling their duties and instead "slack off" themselves.[67]

Contemporary Theories of Motivation: Process-Based

Expectancy Theory

7-5 Compare the process-based theories of motivation: expectancy theory, goal-setting theory, and self-efficacy theory.

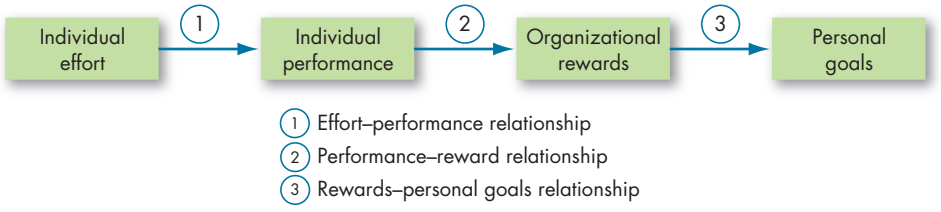
One of the most widely accepted explanations of motivation is Victor Vroom's **expectancy theory**.[68] Although it has critics, most evidence supports the theory.[69] Expectancy theory argues that the strength of our tendency to act a certain way depends on the strength of our expectation of a given outcome and its attractiveness. In practical terms, employees will be motivated to exert a high level of effort when they believe that it will lead to a good performance appraisal, that a good appraisal will lead to organizational rewards such as salary increases and/or intrinsic rewards, and that these rewards will satisfy their personal goals. Therefore, the theory focuses on three relationships (see Exhibit 7-4) that, in many ways, establish a common language to describe the motivational process:

expectancy theory A theory that suggests that the strength of a tendency to act in a certain way depends on the strength of an expectation that the act will be followed by a given outcome and on the attractiveness of that outcome to the individual.

1. **Expectancy: the effort–performance relationship.** The degree to which the individual believes exerting a given amount of effort will lead to performance.
2. **Instrumentality: the performance–reward relationship.** The degree to which the individual believes performing at a particular level will lead to the attainment of a desired outcome.
3. **Valence: the rewards–personal goals relationship.** The degree to which organizational rewards satisfy an individual's personal goals or needs and the attractiveness of those potential rewards for the individual.

Expectancy theory helps explain why a lot of workers are not motivated on their jobs and do only the minimum necessary to get by. It can also explain employees' efforts toward goal accomplishment. For example, let us consider a work contest. The prize? An employee of the month parking spot. Some may really want this; others could not care less (valence). Maybe if the business shares a parking lot with Trader Joe's (and is thus frequently crowded), this spot would be more coveted. Next, what is the contest like? Let us say it is whoever solicits the most donations to the company charity

Exhibit 7-4 Expectancy Theory





The performance–reward relationship is strong at Mary Kay Cosmetics, which offers a rewards and recognition program based on the achievement of personal goals set by each salesperson. The associates shown here in China pose before a pink sedan, one of many rewards that motivate Mary Kay's independent sales force.

Source: China Photos/Getty Images

that year. If an employee puts forth the effort to solicit donations, will they actually receive donations (expectancy)? Maybe people would be more likely to donate in one-dollar increments over $50 increments. Finally, if you do get several people to donate, how likely is it that you will win the parking spot (instrumentality)? Are there multiple parking spots up for grabs? Or just one that Avery wins every year (maybe Avery knows someone who donates a ton of money every year to this contest)? Several factors play into decisions to put forth effort, and expectancy theory suggests that these may be in part explained by valence, instrumentality, and expectancy.

Goal-Setting Theory

You have likely heard this several times: "Just do your best. That's all anyone can ask." But what does "do your best" mean? How do we ever know whether we have achieved that vague goal? Research on **goal-setting theory**, proposed by Edwin Locke and Gary Latham, reveals the impressive effects of goals on performance. Under this theory, intentions to work toward a goal are considered a major source of work motivation.[70] How do goals affect performance? According to the theory and decades of evidence supporting it, goals do four things: (1) They direct attention, (2) they mobilize effort, (3) they encourage persistence, and (4) they facilitate the development of strategy.[71]

goal-setting theory A theory that intentions to work toward a goal are considered a major source of work motivation and lead to higher performance.

Goal Origins If employees can participate in the setting of their own goals, will they try harder? The evidence is mixed, although across studies it appears that they will not perform any better.[72] In some studies, self-set goals yielded superior performance; in others, individuals performed best when assigned goals by their supervisor. If goals are not set by the employee, then the supervisor needs to ensure that the employee clearly understands their purpose and importance.[73] However, self-set goals do have some psychological benefits: Research shows that self-set goals can lead to greater employee enthusiasm, whereas supervisor-set goals may lead to heightened anxiety and perceptions of uncertainty and threat. Ultimately, these differences can have very real consequences for employee emotional exhaustion and OCBs (e.g., employees with supervisor-set goals may be less likely to go above and beyond the call of duty).[74] As a final note, sometimes *we do not have a choice* in goal setting, and instead we may subconsciously "catch" goals from other people. It is important to be aware of the goals that we consciously set versus those we subconsciously adopt.[75]

Goal Characteristics Goal-setting theory is well supported. Evidence strongly suggests that *specific* goals increase performance and that *difficult* goals, when accepted, result in higher performance than do easy goals.[76] Why? First, goals that are specific explicitly direct attention toward what needs to be accomplished. Imagine you just graduated from college—after putting your video game controller down, you add "start applying to jobs" to your agenda. Although this may seem like a step in the right direction, it is a vague and nonspecific goal. A better goal would be "apply to ten to fifteen jobs per week": It specifically defines when and how much of the task you need to accomplish.

Second, once a difficult task has been accepted, we can expect that individual to exert a high level of effort to try to achieve it. Think back to that job application goal you just set—do you think the goal was too difficult or too easy? Delving deeper, the way we frame these goals matters. For instance, you could either set a goal for the number of applications to complete each week (i.e., a *maintenance* goal), or you could set an overall goal for the entire summer,



Cofounders Anthony Thomson, left, and Vernon Hill launched the Metro Bank in London in 2010 with the goal of adding 200 new branches and capturing 10 percent of London's banking market. This challenging goal motivates employees to exert a high level of effort in giving customers exceptionally convenient, flexible, and friendly—including pet-friendly—service.
Source: Toby Melville/Reuters

"complete 130 job applications by the end of the summer" (i.e., an *attainment* goal).[77] Which one seems more difficult to you? Instead of establishing a range of ten to fifteen job applications, you could also set yourself either a minimal standard (e.g., "apply to *at least* ten jobs a week") or a maximal standard (e.g., "apply to fifteen jobs a week *ideally*"). The maximal standard is clearly more difficult, but prior research suggests you would feel more satisfied and accomplished with the maximal than the minimal standard.[78]

Factors That Help or Hurt Goal Setting Although goal setting has a direct impact on performance in organizations, a number of factors can either help or hurt goal-setting efforts. These include (1) goal commitment, (2) task characteristics, (3) feedback, (4) goal orientation, and (5) goal conflict.

Goal Commitment Goal-setting theory assumes an individual is committed to the goal and determined not to lower or abandon it. The individual (1) believes they can achieve the goal and (2) wants to achieve it.[79] Goal commitment is most likely to occur when employees expect that their efforts will pay off in goal attainment, when accomplishing the goal is attractive to them, and when they actively participate in goal setting.[80]

Goal commitment does not happen in a vacuum, however. For instance, we often subconsciously mimic others, which can affect our goal commitment (e.g., see the earlier section on social learning). What if our friends who also graduated recently are not putting all that effort into their job search? Research suggests that we may be likely to mimic this underachievement.[81] Similarly, what if you attend a party with your college friends, everyone is talking about their careers post-graduation, and you feel like you are being evaluated? Would that make you become more committed to the job search? Research suggests that focusing on the "goal audience" and the uneasiness about being evaluated compared to your peers can affect goal commitment.[82]

Goal pursuit is not always "smooth sailing." In fact, in working toward goals, we may often experience setbacks that affect our progress (e.g., finding out you

have been applying to jobs incorrectly by not including a cover letter) or our progress over time (e.g., finding out that you have to help your parents move to a new apartment, limiting how many applications you can fill out). These types of disturbances can be frustrating and cause us to lose commitment toward our goals and perhaps even abandon them.[83] Paradoxically, goal abandonment following an initial failure is more likely for individuals with strong core values, possibly because they internalize the implications of failure more strongly than others do.[84]

Task Characteristics Goals seem to affect performance more strongly when tasks are simple rather than complex (although when the goal is to learn something, challengingly complex material can be inherently motivating).[85] Also, goal setting is more effective when the tasks are independent rather than interdependent.[86] However, on interdependent tasks, group-centered goals that emphasize the person's contribution to the dyad or group are better than goals focused on the person's own performance.[87] Furthermore, when people depend on one another and do not know each other well, goals to cooperate with one another can be effectively motivating.[88] There may also be gender implications: Research suggests that expectations and stereotypes that women are more "communal" than men may cause women to be more sensitive to group goals in interdependent contexts.[89]

Feedback Feedback, in general, leads to higher performance.[90] People do better when they get feedback on how well they are progressing toward their goals because it helps identify discrepancies between what they have done and what they should do next. That is, feedback guides behavior. For example, managers who coach their sales employees and provide feedback can directly facilitate sales goal attainment.[91] But all feedback is not equally potent. Self-generated feedback—with which employees can monitor their own progress or receive feedback from the task process itself—is more powerful than externally generated feedback.[92] In making progress toward your career goals following graduation, it may be helpful to seek the feedback of a career counselor or mentor.[93] However, many of us can recall a time when we received feedback that did not sit well with us, especially if we do not believe we can do much to change or feel like we do not have the psychological and physical resources to actually incorporate the feedback.[94] In general, feedback is a good thing, but it is tricky—the usefulness of feedback depends on the person giving the feedback, the person receiving the feedback, the nature of the task, and the quality of the feedback itself.

Goal Orientations Similar to the content-based regulatory focus theory discussed earlier, goal orientation suggests that people systematically differ in the extent they are motivated to prove themselves through good performance (i.e., *performance-prove*) and avoiding poor performance (i.e., *performance-avoid*) and the extent to which they are motivated to master the task (i.e., *mastery*).[95] However, like regulatory focus, goal orientations can also emerge in situations as motivational states,[96] like how a friendly competition between departments in your organization can momentarily result in a performance-prove orientation. As another example, if you adopt a mastery goal orientation, you are more likely to be effective in accomplishing your goal of completing job applications than if you adopted a performance-avoid orientation.[97]

Considering psychological health and performance outcomes, research on these orientations generally suggests positive outcomes for mastery orientations, undesirable outcomes for performance-avoid orientations, and weak or relatively

mixed effects for performance-prove orientations.[98] Furthermore, conflicting goal orientations can also wreak havoc in teams working toward interdependent goals, with performance-avoid orientations leading to team members hiding and manipulating information when interacting with their teammates.[99] These orientations can even effect how you see your teammates as role models to look up to (*mastery*) or as people to compare yourself to (*performance-prove and -avoid*).[100] Want to develop a mastery goal orientation? Next time you are confronted with a goal, take a step back to reflect on the goal and focus on what you are excited about learning from the situation.[101]

Goal Conflict We often find ourselves confronted with goals that compete with one another. At the executive level, for instance, executives may think they need to pursue profitability at the expense of safety and employee well-being (regardless of whether they may actually go hand in hand in reality).[102] At the personal level, you may have two separate, time-sensitive tasks you need to complete—but only enough time to complete one of them. In general, hundreds of studies suggest that goal conflict has a nefarious effect on employee stress and anxiety[103] and can even linger and affect your performance on tasks that are completely unrelated.[104] How can you manage goal conflict? First, some research suggests you can manage goal conflict by establishing a routine of regulation, in which you recognize and accept the conflict between the goals (i.e., *splicing*), focus on the actions that can lead toward accomplishing both goals (i.e., *activating*), and do not let the actions that are impossible completely thwart progress toward either goal (i.e., *repressing*).[105] Second, if the goals are split between groups with competing goals, inspiring collaboration between the groups and co-constructing solutions can be effective.[106]

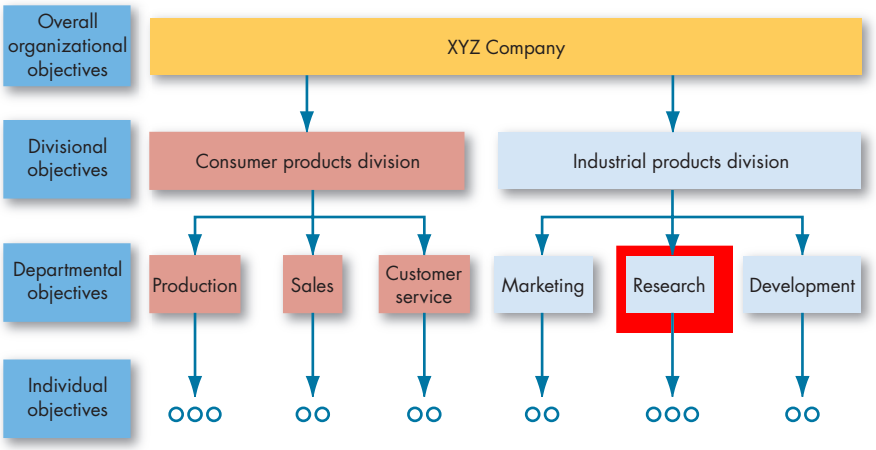
Implementing Goal Setting How do managers set goals in their organizations? That is often left up to the individual manager. Some managers set aggressive performance targets—what General Electric called "stretch goals." For example, Motorola once sought to reduce how long it took to close its year-end books from *six weeks* to *four days*.[107] Some leaders, such as the CEO of Telltale games, are known for their demanding performance goals—some of which even suggest that game developers weather the "crunch," a sudden spike in work hours that requires them to work as many as 20 hours a day.[108] But many managers do not set goals. When asked whether their jobs had clearly defined goals, only a small number of respondents to a survey of managers said yes.[109]

management by objectives (MBO) A program that encompasses specific goals, participatively set, for an explicit time period, with feedback on goal progress.

A more systematic way to utilize goal setting is with **management by objectives (MBO)**, an initiative most popular in the 1970s but still used today.[110] MBO emphasizes participatively set goals that are tangible, verifiable, and measurable. Four ingredients are common to MBO programs: goal specificity, participation in decision making (including the setting of goals or objectives), an explicit time period, and performance feedback.[111] Many elements in MBO programs match the propositions of goal-setting theory. As Exhibit 7-5 shows, the organization's overall objectives are translated into specific cascading objectives for each level (divisional, departmental, individual). But because lower-unit managers jointly participate in setting their own goals, MBO works from the bottom up as well as from the top down. The result is a hierarchy that links objectives at one level to those at the next level.

You will find MBO programs in many organizations from different industries, and many of these have led to performance gains. A version of MBO, called management by objectives and results (MBOR), has been used for thirty years in the governments of Denmark, Norway, and Sweden.[112] However, the popularity of these programs does not mean they always work.[113] When MBO

Exhibit 7-5 Cascading of Objectives



fails, the culprits tend to be unrealistic expectations, lack of commitment by top management, and inability or unwillingness to allocate rewards based on goal accomplishment.

Although goal setting can, be positive, employees and managers should be careful not to overdo it.[114] For example, goals might impede learning because we become too focused on achievement; we may choose the wrong type or form of goal which may impede performance; and we may fall prey to escalation of commitment (see the chapter on perception and decision making) if we are not careful. If you want to maximize the extent to which goal setting is successful, recent research suggests that setting a cadence of accountability can help and monitoring of goals can lead to more frequent goal attainment, especially when goal progress is publicly announced.[115]

Goal Setting and Ethics The relationship between goal setting and ethics is quite complex: If we emphasize the attainment of goals, what is the cost? The answer is probably found in the standards we set for goal achievement. For example, when money is tied to goal attainment, we may focus on getting the money, become willing to compromise ourselves ethically, and disengage from the ethical aspects of the situation (e.g., justify what we are doing even though it is unethical).[116] The context also matters. Time pressure often increases as we are nearing a goal, which can tempt us to act unethically to achieve it.[117] Goal setting can also lead to unethical behavior through depletion.[118] For example, if the kitchen staff is exhausted and overloaded, they might be more prone to take shortcuts in food preparation and cleaning that put food safety in danger. Even personal characteristics matter. For instance, our goal orientation can have an influence—if we are focused more on proving our worth or avoiding failure rather than mastering the process, we may be more likely to engage in unethical behavior.[119]

Self-Efficacy Theory

Self-efficacy refers to an individual's belief of being capable of performing a task.[120] The higher your self-efficacy, the more confidence you have in your ability to succeed. For example, if you feel like your college education equipped

self-efficacy An individual's belief of being capable of performing a task.

you with the employability skills to establish a rewarding career, you may feel more capable of succeeding in your job search and more motivated to apply for jobs post-graduation.[121] In contrast, in difficult situations, people with low self-efficacy are more likely to lessen their effort or give up altogether, while those with high self-efficacy will try harder to master the challenge.[122] Intelligence and personality are linked to higher self-efficacy.[123] People who are intelligent, conscientious, and emotionally stable are so much more likely to have high self-efficacy that some researchers argue self-efficacy is more important than prior research suggested.[124]

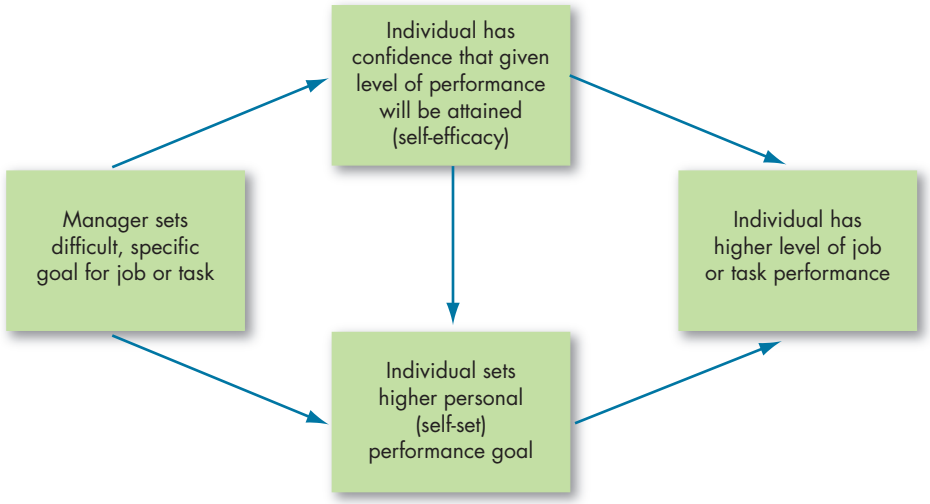
At first glance, this may appear to be more of a content-based approach to motivation, as described in earlier sections. Although self-efficacy theory was originally formulated in this way, later research demonstrated that self-efficacy is integral to the process of maintaining motivation over time. As you move through the job search process, for instance, your perceived progress will in turn affect your self-efficacy perceptions and how intensively you continue to search.[125] To deal with the ebb and flow, it would be helpful to adopt self-management and emotion regulation practices (see the chapter on emotion and mood).[126] Self-efficacy can (but does not always) create a positive spiral in which those with high efficacy become more engaged in their tasks and then in turn increase performance, which increases efficacy further.[127] Self-efficacy may also create situations in which people get "cocky" and start to perform more poorly and become less motivated as a result.[128] However, this may also be attributable to the idea that resources are being conserved and preserved. (You cannot perform well all the time or you would burn out.)[129] What is perhaps important is that people have self-efficacy when and where it counts. For example, entrepreneurs who experienced more variability in self-efficacy were more successful in starting businesses.[130] This indicates that they, at times, demonstrated humility and adapted to setbacks instead of getting cocky.

Increasing Self-Efficacy How can employees achieve high levels of self-efficacy? By bringing goal-setting theory and self-efficacy theory together. As Exhibit 7-6 shows, supportive managers who set difficult goals for their employees may lead them to have a higher level of self-efficacy and set higher goals for their own performance.

Research also suggests that there are four ways of increasing self-efficacy: (1) Give employees relevant experiences with the task (i.e., *enactive mastery*), (2) enable them to watch someone else do the task (i.e., *vicarious modeling*), (3) reassure the employees, letting them know that they have "what it takes" to do the task (i.e., *verbal persuasion*), and (4) tell them to "get psyched up" (i.e., *arousal*)—getting energized will enable the employees to approach the task more positively (although this last step is probably not a good idea if the task is "low-key," like writing a sales report). The vicarious learning aspect may seem familiar—indeed, this recommendation coincides with social learning theory described earlier. It is an especially important aspect to increasing self-efficacy, especially during COVID-19: Globally, health professionals had to vicariously learn from one another in order to adopt best practices for combating the pandemic.[131]

Training programs often make use of enactive mastery by having people practice and build their skills. In fact, one reason training works is that it increases self-efficacy, particularly when the training is interactive and feedback is given afterward.[132] For instance, training programs can be used to help build the career and entrepreneurial self-efficacy of underrepresented students in STEM fields.[133] However, some research suggests that if the employee is unable to see their own improvement, then they will not experience enhanced

Exhibit 7-6 Joint Effects of Goals and Self-Efficacy on Performance



Source: Based on E. A. Locke and G. P. Latham, "Building a Practically Useful Theory of Goal Setting and Task Motivation: A 35-Year Odyssey," *American Psychologist* (September 2002): 705–17.

self-efficacy.[134] Regardless, individuals with higher levels of self-efficacy also appear to reap more benefits from training programs and are more likely to use their training on the job.[135]

The Pygmalion Effect One of the best ways for a manager to use verbal persuasion is through the *Pygmalion effect,* a term based on a Greek myth about a sculptor (Pygmalion) who fell in love with a statue he carved. The Pygmalion effect is a form of *self-fulfilling prophecy* in which believing something can make it true. Here, it is often used to describe "that what one person expects of another can come to serve a self-fulfilling prophecy."[136] For example, if we identify those in the office with the highest leadership potential, we may treat them in such a way where they eventually become a leader.[137] However, we may find leaders in unexpected places, as "diamonds in the rough"—Dov Frohman notes, "Leaders are found in the strangest places. Often the best candidates turn out to be people from outside the mainstream . . . who at first glance one would never expect would have leadership potential."[138] The Pygmalion approach can be effective in the workplace, with replicable results and enhanced effects when leader–subordinate relationships are strong.[139]

Organizational Justice

Equity Theory

7-6 Describe the forms of organizational justice, including distributive justice, procedural justice, informational justice, and interactional justice.

Ainsley is a student working toward a bachelor's degree in finance. Ainsley has accepted a summer internship in the finance department at a pharmaceutical company and is quite pleased with the pay: $20 an hour is more than other students in the cohort receive for their summer internships. At work Ainsley meets

Exhibit 7-7 Equity Theory

Ratio Comparisons*	Perception
$\frac{O}{I_A} < \frac{O}{I_B}$	Inequity due to being underrewarded
$\frac{O}{I_A} = \frac{O}{I_B}$	Equity
$\frac{O}{I_A} > \frac{O}{I_B}$	Inequity due to being overrewarded

*Where $\frac{O}{I_A}$ represents the employee and $\frac{O}{I_B}$ represents relevant others

Kai, a recent graduate working as a middle manager in the same finance department. Kai makes $30 an hour and is dissatisfied.

Specifically, Kai tells Ainsley that compared to managers at other pharmaceutical companies, this position pays much less. "It isn't fair. I work just as hard as they do, yet I don't make as much. Maybe I should go work for the competition?"

How could someone making $30 an hour be less satisfied with their pay than someone making $20 an hour and be less motivated as a result? The answer lies in **equity theory** and, more broadly, in principles of organizational justice.[140] According to equity theory, employees compare what they get from their job (their "outcomes," such as pay, promotions, recognition, or a bigger office) to what they put into it (their "inputs," such as effort, experience, and education). They take the ratio of their outcomes (O) to their inputs (I) and compare it to the ratio of others, usually someone similar like a coworker or someone doing the same job. This is shown in Exhibit 7-7. If we believe our ratio is equal to those with whom we compare ourselves, a state of equity exists, and we perceive our situation as fair. If there are "inequities," then we perceive the situation as unfair.[141]

equity theory A theory stating that individuals compare their job inputs and outcomes with those of others and then respond to eliminate any inequities.

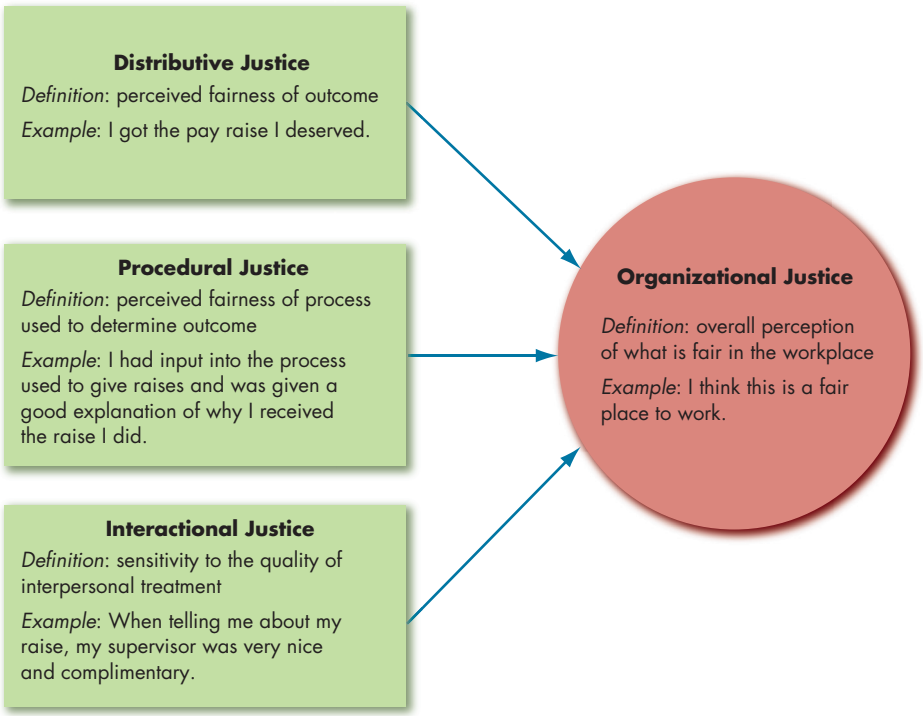
Based on equity theory, employees who perceive inequity will make one of six choices:[142]

1. **Change inputs** (exert less effort if underpaid or more if overpaid).
2. **Change outcomes** (individuals paid on a piece-rate basis can increase their pay by producing a higher quantity of units of lower quality).
3. **Distort perceptions of self** ("I used to think I worked at a moderate pace, but now I realize I work a lot harder than everyone else").
4. **Distort perceptions of others** ("Aisha's job isn't as desirable as I thought").
5. **Choose a different referent** ("I may not make as much as my sibling, but I am doing a lot better than they did at my age").
6. **Leave the field** (quit the job).

Equity theory has support from some researchers, but not from all.[143] As some examples, it seems that some employees are more sensitive to equity, with some feeling more entitled and others feeling more benevolent.[144] Also, if someone feels like they are being overpaid on the job, would you expect them to give back part of their salary? Although equity theory's propositions have not all held up, the hypothesis serves as an important precursor to the study of **organizational justice** or, more simply, fairness in the workplace.[145] Organizational justice is concerned more broadly with how employees feel authorities and decision makers at work treat them. However, it is also concerned with how people adhere to or violate rules and principles in the

organizational justice An overall perception of what is fair in the workplace, composed of distributive, procedural, informational, and interpersonal justice.

Exhibit 7-8 Model of Organizational Justice



workplace.[146] For instance, one could think of equity passively, with board members experiencing injustice when executives retain much more than their "fair share," or actively if we evaluate executives' power and opportunistic behavior to capture a larger portion compared with shareholders.[147] Research over the past several decades consistently shows that justice is critically important for maintaining the employee–organization relationship,[148] especially during times of crisis and uncertainty.[149] For the most part, employees evaluate how fairly they are treated, as shown in Exhibit 7-8.

Distributive Justice

Distributive justice is concerned with the fairness of the outcomes, such as pay and recognition, that employees receive.[150] Outcomes can be allocated in many ways. For example, raises can be distributed equally among employees, or they can be based on which employees need money the most. As we said in our discussion about equity theory, however, employees tend to perceive their outcomes are fairest when they are distributed equitably. Distributive injustice can also occur at a broader level—for example, the Black–White pay gap in the United States has been steadily getting larger from year to year and exists even when they share educational backgrounds and come from affluent families.[151]

distributive justice Perceived fairness of the amount and allocation of rewards among individuals.

The way we have described things so far, individuals appear to gauge distributive justice and equity in a rational, calculative way as they compare their outcome–input ratios to those of others. But the experience of justice, and especially of injustice, is often not so cold and calculated. Instead, people base distributive judgments on a feeling or an emotional reaction to the way they think

they are being treated relative to others, and their reactions are often "hot" and emotional rather than cool and rational.[152] For example, during the 2018 U.S. government shutdown, one TSA employee noted that while others "get to stay home, enjoy their personal time with their families, and still get paid, we have to struggle and suffer… most of us live paycheck to paycheck and cannot afford to be unpaid and still go to work for long. It is not fair."[153] Furthermore, the "type" of reward may matter: One study found that most people care more about pay differences, although differences in recognition and challenging assignments are also important.[154]

Procedural Justice

procedural justice The perceived fairness of the process used to determine the distribution of rewards.

Although employees care a lot about *what* outcomes are distributed (equity theory and distributive justice), they also care about *how* they are distributed. The way in which outcomes are distributed is the focus of **procedural justice**.[155] For one, employees perceive that procedures are fairer when they are given a say in the decision-making process, when decision makers follow several rules, making decisions in a consistent manner (across people and over time), avoiding bias (not favoring one group or person over another), using accurate information, considering the groups or people who their decisions affect, and remaining open to appeals.[156] As an example of procedural justice, if you are hoping for a raise and your manager informs you that you did not receive one, you will probably want to know how raises were determined. If it turns out your manager allocated raises based on merit and you were simply outperformed by a coworker, then you are more likely to accept your manager's decision than if raises were based on favoritism.

If the decision-making process is judged to be fair, then employees are more accepting of unfavorable outcomes.[157] When employees are given a voice in the process, they will feel better about the situation even when the outcomes continue to be poor.[158] Procedural fairness is not just thought of in terms of structure, either. Issues such as how long processes take matter, with certain processes requiring more time to be fair and others requiring less time.[159]

Today, as we have discussed in a number of places in the text (e.g., the chapter on diversity), organizations are attempting to employ artificial intelligence (AI)-assisted decision making to make procedures more fair and less biased.[160] However, do employees actually see these new tools as fair? Some research drawing on thousands of participants suggests that employees might see these tools as reductionist and not taking their specific situations into account. As such, paradoxically, a tool that is meant to improve bias (and objectively may do so) can be seen by employees as more biased.[161]

Interactional Justice

Beyond outcomes and procedures, research has shown that employees care about two other types of fairness that have to do with the way they are treated during interactions with others. Both of these fall within the category of *interactional justice* (see Exhibit 7-8).[162]

informational justice The degree to which employees are provided truthful explanations for decisions.

Informational Justice The first type is **informational justice**, which reflects whether managers provide employees with explanations for key decisions and keep them informed of important organizational matters. The more detailed and candid managers are with employees, the more fairly treated those employees feel.

It may seem obvious that managers should be honest with their employees and not keep them in the dark about organizational matters; however, many

managers are hesitant to share information. This is especially the case with bad news, which is uncomfortable for both the manager delivering it and the employee receiving it. For instance, the COVID-19 pandemic led many managers to be in the position where they had to lay off all or part of their workforce, a decision wrought with a number of justice considerations.[163] Explanations for bad news are beneficial when they take the form of excuses after the fact ("I know this is bad, and I wanted to give you the office, but it wasn't my decision") rather than justifications ("I decided to give the office to Sam, but having it isn't a big deal").[164] Although we frame informational justice here as flowing from managers to employees, managers can experience informational justice, too. For instance, employees who disclosed their pregnancies to their supervisors (thus, improving supervisor informational justice perceptions) enjoyed higher perceived supervisor support.[165]

Interpersonal Justice The second type of justice relevant to interactions between managers and employees is **interpersonal justice**, which reflects whether employees are treated with dignity and respect. Compared to the other forms of justice, interpersonal justice is unique because it can occur in everyday interactions between managers and employees.[166] This quality allows managers to take advantage of (or miss out on) opportunities to make their employees feel fairly treated. For example, some leaders may treat some followers fairly and others unfairly, leading to lower interpersonal justice perceptions,[167] especially for employees who are highly committed to their jobs and embedded in their organizations.[168] Interpersonal injustice, like informational justice, can also affect managers. Unfortunately, some research suggests that even when leaders from underrepresented groups adhere to interpersonal justice rules, they can still be treated with bias in return, as stereotypes are activated concerning their motivations to follow the rules.[169]

interpersonal justice The degree to which employees are treated with dignity and respect.

Justice Outcomes

After all this talk about types of justice, how much does justice really matter to employees? A great deal, as it turns out. When employees feel fairly treated, they respond in many positive ways. All the types of justice discussed in this section have been linked to higher levels of task performance and citizenship behaviors such as helping coworkers, as well as lower levels of counterproductive behaviors such as shirking job duties.[170] Distributive and procedural justice are more strongly associated with task performance, while informational and interpersonal justice are more strongly associated with citizenship behavior. Even more physiological outcomes, such as how well employees sleep and the state of their health, have been linked to fair treatment.[171] Why does justice have these positive effects? Fair treatment enhances commitment to the organization and makes employees feel that the organization cares about their well-being. In addition, employees who feel fairly treated trust their supervisors more, which reduces uncertainty and fear of being exploited by the organization. Fair treatment elicits positive emotions, which in turn prompts behaviors like citizenship.[172]

Interestingly, your coworkers' reactions to injustice can be just as important as your own. Research is beginning to suggest that *third-party*, or observer, reactions to injustice can have a substantial effect. Say that you read about massive, unannounced layoffs at a restaurant chain you frequent. You find out that employees were let go without any warning and were not given any assistance in finding alternative arrangements. Would you continue to go to this restaurant? Research suggests that you may not.[173]

Despite all attempts to enhance fairness, perceived injustices are still likely to occur. Fairness is often subjective; what one person sees as unfair, another may see as perfectly appropriate. For example, a gig worker who just sees their job as a stepping-stone to something bigger may not care as much about unfairness as other gig workers.[174] In general, people see allocations or procedures favoring themselves as fair.[175] However, if an organization is not consistent in how justly it treats its employees and employees feel like they are on a roller coaster of abuse and unfair treatment, then they are more likely to become detached, cooperate less, and have lower job attitudes.[176]

Culture and Justice

Across nations, the same basic principles of procedural justice are respected: Workers around the world prefer rewards based on performance and skills over rewards based on seniority. However, inputs and outcomes are valued differently in various cultures.[177]

We may think of justice differences in terms of cultural values (see the chapter on diversity, equity, and inclusion in organizations). One large-scale study of over 190,000 employees in thirty-two countries and regions suggested that justice perceptions are most important to people in countries with individualistic, feminine, uncertainty avoidance, and low-power-distance values.[178] Indeed, research demonstrates that employees react (e.g., with reduced trust or effort) differently to perceived injustice, like abusive supervision, in different ways depending upon their culture: Employees in Confucian societies that are high power distance tend to be less affected.

We can also look at other cultural factors. Some cultures emphasize status over individual achievement as a basis for allocating resources. Materialistic cultures are more likely to see cash compensation and rewards as the most relevant outcomes of work, whereas relational cultures will see social rewards and status as important outcomes. International managers must consider the cultural preferences of each group of employees when determining what is fair in different contexts.

Integrating Contemporary Theories of Motivation

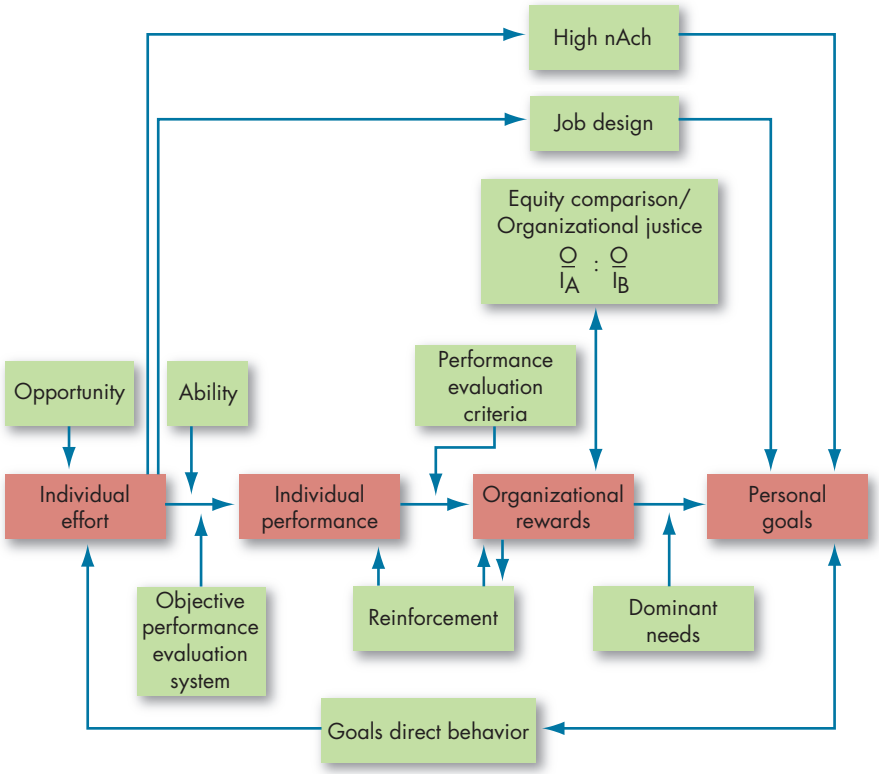
7-7 Describe how the contemporary theories of motivation complement one another.

Our job might be simpler if, after presenting a half dozen theories, we could say only one was valid. But many of the theories in this chapter are complementary. We now tie them together to help you understand their interrelationships. Exhibit 7-9 integrates much of what we know about motivation. Its foundation is the expectancy model that was shown in Exhibit 7-8. Let's walk through Exhibit 7-9. (We will look at job design more closely in the next chapter.)

We begin by explicitly recognizing that opportunities can either aid or hinder individual effort. The individual effort box on the left also has another arrow leading into it, from the person's goals. Consistent with goal-setting theory, the goals–effort loop is meant to remind us that goals direct behavior.

Expectancy theory predicts employees will exert a high level of effort if they perceive a strong relationship between effort and performance, performance and reward, and rewards and satisfaction of personal goals. Each of these relationships is, in turn, influenced by other factors. For effort to lead to good performance, the individual must have the ability to perform and perceive the performance appraisal system as fair and objective. The performance–reward

Exhibit 7-9 Integrating Contemporary Theories of Motivation



relationship will be strong if the individual perceives that performance (rather than seniority, personal favorites, or other criteria) is rewarded. If cognitive evaluation theory were fully valid in the actual workplace, we would predict that basing rewards on performance should decrease the individual's intrinsic motivation. The final link in expectancy theory is the rewards–goals relationship. Motivation is high if the rewards for high performance satisfy the dominant needs consistent with individual goals.

A closer look at Exhibit 7-9 also reveals that the model considers achievement motivation, job design, reinforcement, and equity theories/organizational justice. A high achiever is not motivated by an organization's assessment of performance or organizational rewards, hence the jump from effort to personal goals for those with a high nAch. Remember, high achievers are internally driven if their jobs provide them with personal responsibility, feedback, and moderate risks. They are not concerned with the effort–performance, performance–reward, or rewards–goal linkages.

Reinforcement theory enters the model by recognizing that the organization's rewards reinforce the individual's performance. If employees see a reward system as "paying off" for good performance, the rewards will reinforce and encourage good performance. Rewards also play a key part in organizational justice research. Individuals judge the favorability of their outcomes (for example, their pay) relative to what others receive but also with respect to how they are treated: When people are disappointed in their rewards, they are likely to be sensitive to the perceived fairness of the procedures used and the consideration given to them by their supervisors.

Toward a Better World

Kroger: Zero Hunger, Zero Waste

Kroger, a Fortune 100 U.S. grocery giant, is the parent company to over twenty different grocer chains. Many Americans do their grocery shopping at a Kroger-owned store. Since 2018, many customers may have become aware of Kroger's "moonshot" goals as a part of its "Zero Hunger, Zero Waste" corporate social responsibility initiative. It all started with Kroger associates recognizing a "fundamental absurdity" in the U.S. food supply chain: a staggering *40 percent* of U.S.-produced food is wasted or discarded. Further, *one in every eight* Americans battles hunger daily. With this problem in mind, Rodney McMullen (Kroger CEO) set forth a vision: "No family in a community we serve should ever go hungry, and no food in a store we operate should ever go to waste." Since then, Kroger has been very forthcoming in its practices and procedures in realizing this vision, even setting a target date to reach this goal.

Aligned with goal-setting theory, Kroger set a specific, difficult set of goals, applicable to all executives, employees, customers, and other stakeholders: (1) Zero hunger. (2) Zero waste. Although many at Kroger recognize that these goals are incredibly ambitious, they directly communicate the initiative's objectives to everyone, customers and employees alike. From these ultimate goals, Kroger set several sub-goals to reach these objectives. These sub-goals included establishing a multimillion-dollar grant fund for startups in food waste reduction, donating billions of meals, advocating and promoting legislation to reduce food waste and alleviate hunger, leveraging big data and AI to identify where these goals can effectively be advanced, and forming strategic partnerships with other organizations who have this goal (along with convincing their current partners to adopt the goal as well).

Are these goals working? Just two years later, it appears that Kroger is undoubtedly making progress: It has committed over $200 million toward hunger alleviation, donated nearly 500 million meals to communities, and identified and rescued over 100 million pounds of food from stores, manufacturing facilities, and distribution centers. Kroger has also diverted a staggering 80 percent of its total waste from landfills and transformed 94 percent of its manufacturing plants to a completely zero-waste model. Kroger has established strategic partnerships with major organizations like Feeding America and the World Wildlife Fund (WWF) and funded innovative startups like Imperfect Foods and Mobius.

How does Kroger inspire its employees *and* customers to join it toward these goals? For one, it starts with the active engagement of customers. For instance, Kroger became one of the only Fortune 100 companies to start its own recycling program, encouraging customers to save waste materials that would otherwise *not* be recyclable through their local programs and mail them in, postage paid. As Keith Dailey, a vice president at Kroger, noted, "A key part of achieving our ambitious Zero Hunger, Zero Waste vision is offering our customers innovative solutions to recycle and reuse product packaging." What about the employees? Kroger does several things to engage its associates in social responsibility activities, primarily through training and development, coaching, participative leadership, and social media. Kroger also specifically uses CSR-oriented employee recognition programs, recognizing employees as "Zero Heroes." These associates go above and beyond to help Kroger meet its Zero Hunger, Zero Waste goals. A Kroger trainer, Amber Winchester of Paducah, Kentucky, received this accolade for brokering relationships between the local Kroger division and local communities in need of food. Winchester seems to provide an excellent example for self-concordance in action: "It is important for me to work for a company that I can actually stand behind, a company that values the same things that I do . . . not letting people starve and not polluting the environment with more garbage is definitely something that I personally stand behind . . . it is just really cool that Kroger has those same values." Kroger employs evidence-based motivation practices to foster job engagement in corporate social responsibility by increasing self-concordance, modeling employees' behaviors, and granting autonomy.[179]

Summary

Motivation is key to understanding employees' contributions to their work. Overall, motivation underlies how and why employees exert effort to engage in performance activities, which meet personal or organizational goals. Motivation describes the processes (e.g., intensity, direction, and persistence) underlying how people in the workplace direct their efforts toward a goal. Although not well supported, many classic, foundational theories of motivation focused on psychological needs and the consequences of need satisfaction. Despite still being applied by managers in practice, these theories have fallen out of favor for OB theorists and researchers. On the other hand, many evidence-based, contemporary theories of motivation paint a more comprehensive, precise picture of motivation. In this chapter, we follow other researchers by arranging these theories into three categories: content, context, and process. Content theories focus on aspects of motivation that these theorists suggest are fundamental to the human experience (e.g., self-determination theory) or reflect individual differences in motivation (e.g., regulatory focus and job engagement). The second category focuses on the influence of the context on motivation, such as rewards (e.g., reinforcement) and role models (e.g., social learning). The third category, process theories, focuses on motivation as a process and how it leads to behavior and performance. Expectancy theory, goal setting, and self-efficacy characterize aspects of the motivation process that lead people to become motivated and act on their motivations. Lastly, no discussion of motivation in organizations would be complete without a focus on organizational justice: Concerns of equity, fair distribution of resources, and procedural fairness along with interactional respect and dignity are essential to predicting motivation and behavior in the workplace. Given the breadth of understanding of motivation in the workplace, we bring the theorizing together into a complementary workplace motivation model. This model outlines the human resource processes and interventions grounded in theory that inform motivation applications described in the next chapter.

Implications for Managers

- Classic theories paint an incomplete picture of motivation. Consider contemporary theories when assessing motivation in your organization.
- People will be motivated if they feel like their actions are feely chosen and in alignment with their interests and values. Try to foster this autonomy instead of treating motivation as completely "controllable" through pressure, direction, or reward.
- Despite the power of autonomy, rewards and reinforcement can still be a powerful force in promoting desired behaviors in organizations—but do not underestimate the psychological aspects of motivation. Rewards alone cannot fix organizational problems.
- Depending on which behaviors are desirable given the task, try to adopt or lead others toward a promotion focus (e.g., for innovation goals) or prevention focus (e.g., for safety goals).
- Job engagement is still a management "buzzword," and there is confusion regarding what job engagement actually represents. However, it can help put motivation into practice. Apply other contemporary motivation theories to understand how employees and managers can become (and stay) engaged in the workplace.

- Lead by example: Model and encourage others to model the types of behaviors you would like to see performed by employees.
- Thinking of motivation in terms of expectancy, instrumentality, and valence can help you break down many common motivation problems in organizations into their parts. Ask yourself whether effort leads to performance, whether performance leads to the desired outcome, and whether those involved actually care about it.
- Harness the power of goal setting: Set specific, difficult goals. Consider the factors that may affect goal setting. Determine whether a management by objectives program would be suitable for your organization.
- Self-efficacy can affect motivation and behavior throughout the motivation process and is sometimes helpful and sometimes even harmful. Consider how self-efficacy changes throughout the goal-setting process and adapt accordingly.
- When making decisions regarding resources in your organization, make sure to consider how the resources are being distributed (and who is affected), the fairness of the decision, and whether your actions demonstrate that you respect those involved.

Feel-Good Messaging Is More Motivating Than Instrumental Messaging

POINT

Financial incentives were once thought to be the key to motivating people. However, many have challenged this view, demonstrating that connecting people's work to prosocial causes can motivate people in ways that a paycheck or bonus cannot. This "feel-good messaging" leads employees to become motivated by deriving meaning from what they do. As an example of the importance of meaning at work, nine out of ten people are willing to give up a percentage of their lifetime earnings if it means engaging in more meaningful work. Feeling good about work is vital for employees around the world. Seventy-seven percent of respondents across forty-seven countries report that a job that is useful for society is either essential or very important to them. Leaders can effectively motivate employees when they communicate to them their impact on the beneficiaries of their work (e.g., patients, clients, customers, etc.) Thus, focusing on the immediate impact of one's work can motivate employees. When employees are inspired by the idea that their work may contribute to a better society (whether through protecting the environment, reducing poverty, or promoting social justice), they will be motivated. Even if the company may benefit from its practices through cost reduction, employees will be more motivated by understanding the impact they have on the world and enhancing their sense of meaningfulness than if their impact was measured as contributions to the organization's goals. For instance, would you rather be known for making a difference in a customer's life by making their homeownership dream a reality? Or would you rather be known as being the number one realtor at your real estate company?

COUNTERPOINT

The practical reasons for changing behavior may not be as appealing as the feel-good messages. Still, they convey that an organization has genuine motives. More companies are speaking out about social issues and committing to prosocial initiatives, but they support them for instrumental reasons (i.e., as a means to an end). But not all of them follow through, leading the public and employees to be more critical and wary of organizations' purportedly "prosocial" intentions. Some suggest that "instrumental messages" (e.g., we are reducing our plastic usage to *limit costs*) are more effective than "feel-good" messages (e.g., we are reducing our plastic usage to *save the environment*) in motivating employees. This idea runs contrary to the popular idea that organizations should rely on feel-good messaging to motivate employees. Demonstrating the practical, instrumental purposes of work can be just as, if not more, motivating than feel-good messaging. The real issue is that employees must believe these prosocial motives are genuine. If the organization is only committing to social initiatives for the financial benefit, these messages are likely to be less motivating. Encouraging leaders to say, "We believe in limiting costs" may be less appealing. Still, it is more likely to be perceived as authentic and ultimately motivate employees.[180]

CHAPTER REVIEW

QUESTIONS FOR REVIEW

7-1 What are the three key elements of motivation?

7-2 What are some classic theories of motivation? How applicable are they today?

7-3 What are the similarities and differences between self-determination theory, regulatory focus theory, and job engagement theory?

7-4 What are the fundamental principles of reinforcement theory and social learning theory?

7-5 How do expectancy theory, goal-setting theory, and self-efficacy theory operate during the motivation process?

7-6 What are some of the various organizational justice types, and what are their outcomes?

7-7 How do the contemporary theories of motivation complement one another?

APPLICATION AND EMPLOYABILITY

Motivation is a fundamental aspect of organizational behavior. It drives effortful work processes toward the accomplishment of work tasks and the realization of work goals. Therefore, by understanding the traditional and contemporary theories of motivation and how workplace decisions affect motivation, you can develop your management skills and become more employable. Understanding equity theory and organizational justice can help you understand the impact of fairness in the workplace and consider others' fairness perspectives when making organizational decisions. In this chapter, you developed your critical thinking, creativity, and leadership skills by questioning whether work has to be purposeful to be motivating, debating the usefulness of electronic employee monitoring and "feel-good" messaging, and understanding how some organizations use goal setting to meet ambitious CSR goals. In the following section, you will continue to develop these skills as well as your self-management skills by considering the best ways to motivate employees in different situations; learning to recognize the "folly of rewarding A while hoping for B"; and considering laziness in the workplace, especially how it can escalate and spread to others.

EXPERIENTIAL EXERCISE How Do You Motivate an Employee?

You and a partner will take turns playing the role of a manager and an employee. The following four scenarios describe various reasons why the employee is experiencing a lack of motivation. The manager's task is to use whichever strategies they see fit to help motivate the employee.

- *SCENARIO 1:* You are reluctant and unmotivated to take on a task assigned to you. You feel that the task does not align with your interests and that someone else would be better suited to handle it.
- *SCENARIO 2:* You think a task that has been assigned to you should be handled by someone else as you are, frankly, overqualified. It would be a waste of your skill set and expertise to spend time working on this task.
- *SCENARIO 3:* You feel unmotivated and anxious about completing a task because you are worried you will not do it well. There is a tight deadline.
- *SCENARIO 4:* You are unmotivated to complete a task. You are not sure why, but you think it is because you do not like your fellow team members who work with you on the task. As a result, you have been trying to get one of your colleagues to complete the task instead.

After completing the role-play exercise, answer the following questions with your partner.

Questions

7-8. When you were playing the employee's role, how did the manager's suggestions make you feel?

7-9. Do you believe the manager's suggestions were effective? Why or why not?

7-10. From the employee's perspective, do you think the manager could have done anything differently to improve your motivation?[181]

ETHICAL DILEMMA Follies of Reward

Most of the time, we have good intentions when we try to reward others. We might give a bonus to an employee who has done an exceptionally good job all year. Or our reward systems might be a little more institutionalized. For example, a movie theater might reward an employee for soliciting charity donations from moviegoers, or a realtor might receive a commission for each house sold.

Sometimes, however, even with good intentions, we may be rewarding the wrong thing. In a classic article of the same title, Steven Kerr outlines this "Folly of Rewarding A, While Hoping for B." For example, if you go to the doctor's office, the doctor can make two types of errors: (1) pronouncing you well when you are actually sick and (2) pronouncing you sick when you are actually well. If the doctor commits the first error, the consequences are grave—there could be a threat of a lawsuit, malpractice, or negligence. If the doctor commits the second error, the consequences have much less of an impact—the doctor generates more income, establishes a more regular customer base, and is rewarded by society for taking a "conservative" approach to diagnosis. These reward and punishment differences persist, even when there is the chance that treatment without due cause can cause more harm than good. However, shouldn't society seek to minimize both types of errors and instead seek medical diagnostic accuracy as a goal?

In a more recent example, one study found that a monthly perfect attendance award program across five industrial laundry plants did not work the way it was intended to: When participants became ineligible for the award, they showed up less frequently. The employees became so focused on attendance that their efficiency decreased by 8 percent because many of them would become ineligible for the reward after coming in late or missing a day during the month period. The plant was rewarding attendance and hoping for good performance.

Questions

7-11. How do you think we might be able to recognize when we are rewarding the wrong thing? What steps can organizations take to recognize these instances?

7-12. Is rewarding the unintended behavior or outcome always unethical? Why or why not?

7-13. Do you think it is possible for a reward program to start out rewarding the appropriate behavior at its inception but then begin to reward the wrong thing over time? Why or why not?[182]

CASE INCIDENT Why Lead by Example?

Motivating staff is one of the most important tasks of any manager, and there are multiple theories that try to explain what makes employees "tick." A common piece of advice that most of us will have heard is to lead by example. But why is this important? The Motivational Theory of Role Modeling was developed by Thekla Morgenroth and Michelle Ryan at the University of Exeter in the United Kingdom and Kim Peters at the University of Queensland in Australia. In broad terms, the theory shows how role models can influence people's goals and motivations in three ways: by acting as behavioral models, by representing what is possible, and by being inspirational. It explains how the power of role models can be harnessed to increase role aspirants' motivation, reinforce their existing goals, and facilitate their adoption of new goals.

The theory draws on a combination of social learning theory and role modeling insights as well as expectancy-value models of motivation to offer a useful framework that explains why and how role models in organizations may be key to motivation. First of all, role models may motivate employees to imitate certain behavioral patterns. Social learning theory states that we can learn not only through our own experience but also by observing other people's conduct and behavior. This means that people can be motivated or demotivated by perceived consequences without necessarily having to experience them firsthand.

For instance, you may hear your manager say, "We have excellent new flexible work policies. All employees should feel free to work hours that suit them or from home when they want!" However, in the coming weeks, you see that your manager continues to come to the office at 9 a.m. and leaves at 5 p.m. every day; they also reward colleagues who seem to follow the same work pattern and show no flexibility in the timing of meetings. In this situation, it is very unlikely that you would be motivated to follow your manager's advice to follow the new policies.

That's why the "do as I say, not as I do" approach is a challenge for managers in terms of motivating their employees. Interestingly, both positive and negative role models can be influential, with negative role models serving to demonstrate behaviors that one may want to avoid. For example, an employee who has reached a managerial position may treat those who report to them differently as a result of what they witnessed as the consequences of management's poor treatment of their colleagues. That's why leading by example remains important for managers of all levels.

In addition to their behavior, role models may also affect broader employee motivation in terms of their aspirations or career goals, by acting as representations of what is possible and achievable as well as inspirations for success. The motivational influence of role models may also depend on the expectancy—or individuals' perceived likelihood—of success as well as of value, which refers to the individual's perceived desirability of such success. The theory suggests that the characteristics of role models, like levels of the role model's success and similarity between role model and role aspirant, may affect one's motivation and its intensity. For instance, people are more inspired to persist with their efforts when they observe someone "like them" achieve success. For example, research by McGinn and colleagues found that daughters of mothers who work are 1.21 times more likely to be employed and 1.29 times more likely to be in supervisory and managerial positions, and this role modeling effect was only found to impact mothers and daughters, not sons. Similarly, studies in business and entrepreneurship find that exposure to female role models significantly boosts women's self-efficacy and inclination to pursue careers in business. This partially explains why diversity of representation is so important in organizations; employees need different sources of motivation.[183]

Questions

7-14. Explain why leading by example is so important for employee motivation. Use the motivational theories discussed in the case and illustrate your answer by applying them to your own experiences at study or work.

7-15. Think about the role models who have influenced you. What do you think were the key characteristics that made them effective in motivating you?

7-16. Do you think it is possible for employees to still be motivated or exhibit positive work behaviors even when their managers don't exhibit them?

8 Motivation: From Concepts to Applications



Source: Teresa Crawford/A.P./Shutterstock

LEARNING OBJECTIVES

After studying this chapter, you should be able to:

8-1 Describe how the job characteristics model (JCM) motivates through job design.

8-2 Compare the main ways jobs can be redesigned.

8-3 Explain how specific alternative work arrangements can motivate employees.

8-4 Describe how employee involvement measures can motivate employees.

8-5 Demonstrate how different types of extrinsic pay programs can influence employee motivation.

8-6 Show how flexible benefits can motivate employees.

8-7 Identify the motivational benefits of intrinsic rewards.

Employability Skills Matrix (ESM)

	Myth or Science?	An Ethical Choice	Point/ Counterpoint	Toward a Better World	Experiential Exercise	Ethical Dilemma	Case Incident
Critical Thinking & Creativity	✓		✓	✓	✓	✓	✓
Communication			✓	✓	✓	✓	✓
Collaboration			✓		✓	✓	✓
Self-Management	✓		✓	✓			
Social Responsibility		✓		✓		✓	
Leadership	✓	✓	✓	✓	✓	✓	✓
Career Management	✓		✓				

TEACHER MERIT PAY: IS IT THE SOLUTION?

One of the most contentious topics related to education reform is that of teacher pay. There have been many teacher walkouts and strikes with teacher compensation as a central issue. For example, Chicago Public Schools, the nation's third-largest school district, eventually approved a historic 16 percent pay increase in 2019 after months of failed negotiations with the Chicago Teachers Union and eleven days of canceled classes. The American public also agrees that teachers should be paid more, with 60 percent of Americans believing school districts do not compensate teachers fairly.

In most school districts, teachers are usually paid based on the number of years they have been teaching and their education level. However, this system has been criticized as unfair because top-performing, long-tenured, and well-educated mediocre teachers are all paid the same salary. Alternatives to this system involve differentiating pay through performance-based incentives. These have all been met with considerable opposition, particularly from teacher union leaders. They argue that there is no objective definition of a "good teacher" and that these systems are biased as a result. Furthermore, critics of merit pay believe it is unfair to pay teachers based on criteria such as student achievement, arguing that there are many factors outside the classroom that can impact student learning, such as students' health and home environment.

Despite opposition, teacher merit pay programs are becoming more popular and have obtained financial and political support. The federal

government has allocated more than $2 billion in more than thirty states to design and implement performance pay systems. The implementation of these programs, though, has not been without obstacles. In 2019, Denver teachers nearly went on strike against what was viewed by many as a promising merit pay system, ProComp. Although student achievement increased under this system, many teachers were dissatisfied with unpredictable fluctuations in their pay. In theory, merit pay may have the potential to improve teacher motivation and student achievement; however, implementing a pay-for-performance system may be ineffective at achieving the desired results.

There is also considerable debate among education researchers about merit pay's effect on teacher motivation. There is research demonstrating that teachers are more likely to remain in their jobs when their salary increases. However, an increase in base pay is the largest for less experienced teachers and tends to decrease with experience. Some also argue that merit pay systems can create competition among teachers, disincentivizing cooperation and collaboration among them. However, it depends on how the school district decides to implement the system. Suppose it is a zero-sum system where only the top ten teachers receive a financial incentive. In that case, it is more likely to create division than if all teachers could potentially qualify to earn up to a maximum bonus. Another version of a merit pay system may tie a proportion of one's performance evaluation to effective group participation. The idea is that this would create a greater incentive for teachers to share and discuss lessons and strategies, ultimately increasing the effectiveness of more teachers. The research also demonstrates a modest but statistically significant positive effect of merit pay programs on student test scores. Although merit pay may have a small effect on teacher motivation, intrinsic motivators may have a more substantial motivational effect than financial incentives.

In general, it appears that the key to effective merit pay is in how the programs are implemented. Rewarding teams of teachers results in a larger effect than awarding raises based on their rank-order in performance. It also can improve teacher recruitment and retention, which are particular challenges for schools in low-income communities. Thus, merit pay programs show promise, but administrators must pay careful attention to how these programs are implemented. Regardless, merit pay represents a significant shift in how numerous schools and organizations as a whole have operated for many years.[1]

Organizations take a number of approaches toward encouraging, maintaining, and harnessing manager and employee motivation. Some focus on the nature of the job itself and involve designing work to emphasize the characteristics that are most motivating to workers or empowering workers to have a say in the work that they complete. On the other hand, some focus on the motivators

for work, including rewards and benefits. In this chapter, we discuss the many ways organizations approach motivation in the workplace.

In the previous chapter, we discussed the theory behind motivation. Here, we discuss application. Although not all theories brought up in the prior chapter are discussed here, you will come to find that major contemporary theories [e.g., self-determination theory (SDT)] play a large role. Of course, it is important to understand these underlying theories; it is also important to see how they can be applied in the workplace, beginning with job design.

Motivating by Job Design: The Job Characteristics Model (JCM)

8-1 Describe how the job characteristics model (JCM) motivates through job design.

The way work is structured has a bigger impact on an individual's motivation than it seems. For example, one survey of nearly three thousand working parents in the UK found that 78 percent were working beyond their contracted hours (despite having children to care for), mainly for workload reasons or because it was part of the culture to work overtime. Commenting on the results, one manager noted that employers should "really rethink job design to tackle the problem of overworking. Parents need more human-sized jobs."[2]

Job design suggests that the way elements in a job are organized can influence employee effort,[3] and the job characteristics model discussed next can serve as a framework to identify opportunities for changes to those elements. Considering our discussions from the prior chapter, many of the concepts to be discussed may seem familiar to you, including autonomy (a major component of SDT) and feedback (a key player in the goal-setting process). The **job characteristics model (JCM)** describes jobs in terms of five core job dimensions:[4]

job design The way the elements in a job are organized.

job characteristics model (JCM) A model proposing that any job can be described in terms of five core job dimensions: skill variety, task identity, task significance, autonomy, and feedback.

1. **Skill variety** is the degree to which a job requires a variety of activities using different skills or talents. The work of a garage owner-operator who does electrical repairs, rebuilds engines, does bodywork, and interacts with customers scores high on skill variety. The job of a body shop worker who sprays paint eight hours a day scores low on this dimension.
2. **Task identity** is the degree to which a job requires completion of a whole and identifiable piece of work. A cabinetmaker who designs furniture, selects the wood, builds the furniture, and finishes the pieces has a job that scores high on task identity. A job scoring low on this dimension would involve operating a lathe solely to make table legs.
3. **Task significance** is the degree to which a job affects the lives or work of other people. The job of a nurse helping patients in a hospital intensive care unit scores high on task significance; sweeping floors in a hospital scores low.
4. **Autonomy** is the degree to which a job provides the worker freedom, independence, and discretion in scheduling work and determining the procedures for carrying it out. Sales managers who schedule their own work and tailor their sales approach to each customer without supervision have highly autonomous jobs. An account representative who is required to follow a standardized sales script with potential customers has a job low on autonomy.
5. **Feedback** is the degree to which carrying out work activities generates direct and clear information about your own performance. A job with high feedback would be testing and inspecting iPads. Installing components of iPads as they move down an assembly line provides low feedback.

skill variety The degree to which a job requires a variety of activities using different skills or talents.

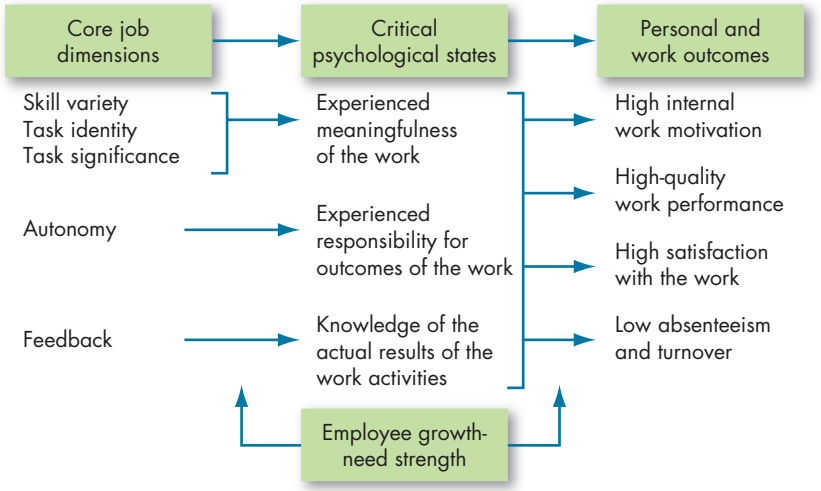
task identity The degree to which a job requires completion of a whole and identifiable piece of work.

task significance The degree to which a job has a substantial impact on the lives or work of other people.

autonomy The degree to which a job provides substantial freedom and discretion to the individual in scheduling the work and in determining the procedures to be used in carrying it out.

feedback The degree to which carrying out the work activities required by a job results in the individual obtaining direct and clear information about the effectiveness of the individual's performance.

Exhibit 8-1 The Job Characteristics Model



Source: Based on J. R. Hackman and G. R. Oldham, "Development of Job Diagnostic Survey," *Journal of Applied Psychology* 60, no. 2 (1975): 159–70; J. L. Pierce, I. Jussila, and A. Cummings, "Psychological Ownership Within the Job Design Context: Revision of the Job Characteristics Model," *Journal of Organizational Behavior* 30, no. 4 (2009): 477–96.

Elements of the JCM

Exhibit 8-1 presents the JCM. Note how the first three dimensions—skill variety, task identity, and task significance—combine to create meaningful work the employee will view as worthwhile. Jobs with high autonomy give employees a feeling of responsibility for work outcomes, and feedback shows them how effectively they are performing. The more these three psychological states (e.g., meaningfulness, responsibility, and knowledge of results) are present, the greater will be employees' motivation, performance, and satisfaction, and the lower their absenteeism and likelihood of leaving. As Exhibit 8-1 indicates, individuals with a high growth need are more likely to experience the critical psychological states when their jobs include these elements—and are more likely to respond to them more positively.

Efficacy of the JCM

Much evidence supports the relationship between the presence of these job characteristics and higher job satisfaction, organizational commitment, and experienced meaningfulness through increased motivation.[5] Furthermore, although employees have noticed that jobs are becoming more autonomous and interdependent and requiring more skills than before, the relationships with job satisfaction have not changed since the 1970s, suggesting that employees still value enriched work.[6] In general, research supports the JCM, although some personality and context differences exist. For example, studies suggest that the link between job characteristics and satisfaction are highest when employees tend to regularly experience positive moods (i.e., trait positive affect; see the chapter on emotions and moods).[7] Other research has explored the JCM in unique settings such as in virtual work situations, finding that if individuals work together online but not in person, their experience of meaningfulness, responsibility, and knowledge of results can suffer.[8] Thankfully, managers can mitigate these negative effects for employees by consciously developing personal relationships with them and increasing their sense of task significance, autonomy, and feedback.[9]

Motivating Potential Score (MPS)

We can combine the core dimensions of the JCM into a single predictive index, called the **motivating potential score (MPS)** and calculated as follows:

motivating potential score (MPS) A predictive index that reflects the motivating potential in a job.

$$\text{MPS} = \frac{\text{skill variety} + \text{task identity} + \text{task significance}}{3} \times \text{autonomy} \times \text{feedback}$$

To be high on motivating potential, jobs must be high on at least one of the three factors that lead to experienced meaningfulness and high on both autonomy and feedback. If jobs score high on motivating potential, the model predicts that motivation, performance, and satisfaction will improve and that absences and turnover will be reduced. Think about your job (or one you have had in the past). Could you work on different tasks, or was there more of a routine? Could you work independently, or did you constantly have a supervisor or coworker looking over your shoulder? Your answers might indicate this job's motivating potential.

Job Redesign

8-2 Compare the main ways jobs can be redesigned.

"Every day was the same thing," Cameron said. "Stand on that assembly line. Wait for an instrument panel to be moved into place. Unlock the mechanism and drop the panel into the Jeep Wrangler as it moved by on the line. Then I plugged in the harnessing wires. I repeated that for eight hours a day. I don't care that they were paying me $24 an hour. It was really taking a toll on me. Finally, I just said this isn't going to be the way I'm going to spend the rest of my life. My brain was turning to JELL-O. So I quit. Now I work in a print shop and I make less than $15 an hour. But let me tell you, the work I do is really interesting. The job changes all the time, I'm continually learning new things, and the work really challenges me! I look forward every morning to going to work again."

The repetitive tasks in Cameron's job at the Jeep plant provided little variety, autonomy, or motivation. In contrast, Cameron's job in the print shop is challenging and stimulating. From an organizational perspective, the failure of Cameron's first employer to redesign the job into a more satisfying one led to increased turnover. Redesigning jobs therefore has important practical implications—reduced turnover and increased job satisfaction among them.[10]

Furthermore, societies and organizations are looking to job design as one way to improve inclusiveness in organizations. Consider Mohsin Khan, a seventy-five-year-old aircraft repair technician—as Khan's eyesight deteriorated, the company invested in an expensive laser-marker machine with a large screen to help emboss numbers on metal plates to assist Khan in how he does his job.[11] Singapore is helping businesses assist and retain older employees through a job redesign grant, available since 2016.[12] This grant has enabled the government and businesses to care for the needs of the aging population and provide a source of life enrichment for older workers. Let us look at other ways that jobs can be redesigned to motivate employees.

Job Rotation and Job Enrichment

Job Rotation If employees suffer from over-routinization of their work, one alternative is **job rotation**, or the periodic shifting of an employee from one task to another with similar skill requirements at the same organizational level (also called *cross-training*).[13] One survey of millennial managers and professionals suggests that job rotation is an important aspect of modern work, with roughly 70 percent of respondents rating it as important.[14] Manufacturers also use job

job rotation The periodic shifting of an employee from one task to another.

rotation as needed to respond more flexibly to the volume of incoming orders while also reducing employee boredom and increasing employee motivation.[15] It may also increase safety and reduce repetitive-based work injuries, but that is currently a topic of much study and debate, with mixed findings.[16]

New managers are sometimes rotated through jobs, too, to help them get a picture of a whole organization.[17] For these reasons, job rotation can be applied in any setting where cross-training is feasible, from manufacturing floors to hospital wards. At Singapore Airlines, for instance, a ticket agent may temporarily take on the duties of a baggage handler, both to be cross-trained and to get exposure to different aspects of the organization. Extensive job rotation is among the reasons that Singapore Airlines is rated one of the best airlines in the world.[18]

Job rotation does have drawbacks. Training costs increase when each rotation necessitates a round of training. Second, moving a worker into a new position reduces overall productivity for that role. Third, job rotation creates disruptions when members of the work group must adjust to new employees. Fourth, supervisors may have to spend more time answering questions and monitoring the work of recently rotated employees.

job enrichment Adding high-level responsibilities to a job to increase intrinsic motivation.

Job Enrichment The major focus of SDT (see the previous chapter) can be put into action through the process of job enrichment. In **job enrichment**, high-level responsibilities are added to the job to increase a sense of purpose, direction, meaning, and intrinsic motivation.[19] Enriching a job in this way is different from enlarging it (adding more tasks and requirements). It involves adding another layer of responsibility and meaning. Job enrichment has its roots in Herzberg's theories (see the previous chapter) of providing hygiene factors to increase motivation at work.

Early reviews suggest that job enrichment can be effective at reducing turnover, almost twice as effective as giving employees a "realistic preview" of the work before they join the organization.[20] In a survey of over twenty thousand British employees, job enrichment practices were related to organizations' financial performance, labor productivity, absenteeism, and output quality through improvements in job satisfaction.[21] Regardless of these benefits, managers who are high on openness (see the chapter on personality and individual differences) and are in autonomous jobs themselves tend to be more likely to *design* jobs that are enriching.[22] Regardless of personality, managers should consider the benefits of job enrichment and work against natural inclinations to micromanage.

Relational Job Design

While redesigning jobs on the basis of job characteristics theory is likely to make work more intrinsically motivating, research is focusing on how to make jobs more *prosocially* motivating to people. In other words, how can managers design work so employees are motivated to promote the well-being of the organization's beneficiaries (customers, clients, patients, and employees)? This view, **relational job design**, shifts the spotlight from the employee to those whose lives are affected by the job that the employee performs.[23] It also motivates individuals toward increased job performance and job satisfaction, especially when coupled with designing and redesigning jobs for autonomy.[24] Why do these connections have such positive consequences? Meeting beneficiaries firsthand—or even just seeing pictures of them—allows employees to see that their actions affect a real person and have tangible consequences. It makes customers or clients more memorable and emotionally vivid, which leads employees to consider the effects of their work actions more. Connections allow employees to take the perspective of beneficiaries, which fosters higher levels of commitment.

relational job design Constructing jobs so employees see the positive difference they can make in the lives of others directly through their work.



Medical device maker Stryker provides opportunities for its employees to connect with people affected by their work. Shown here are its employees with endurance athlete Daren Wendell (center, in hat), who has an implanted titanium rod in his leg that Stryker produced.

Source: Diane Bondareff/InVision for Stryker/AP Images

One way to make jobs more prosocially motivating is to relate stories from customers who have found the company's products or services to be helpful. For example, the medical device manufacturer Medtronic invites people to describe how its products have improved or even saved their lives and shares these stories with employees during annual meetings, which provides the employees a powerful reminder of the impact of their work.[25] For instance, Medtronic found that their services improve the lives of two people *every second*.[26] As another example, researchers found that when university fundraisers briefly interacted with the undergraduates who would receive the scholarship money they raised, they persisted 42 percent longer and raised nearly twice as much money as those who did not interact with potential recipients.[27] The positive impact was apparent even when fundraisers met with just a single scholarship recipient. Personal contact with beneficiaries may not always be necessary. Once a child's chemotherapy comes to an end at one of the many cancer centers across the United States and they have successfully defeated cancer, it has become tradition for the child to ring a bell, the sound of which is often broadcast throughout many areas of the hospital. The mere act of hearing this bell is inspiring to the staff. Dr. ZoAnn Dryer of the Texas Children's Cancer Center notes, "Every time that bell rings, it's like you know what, somebody else has done it. That's what this is all about."[28]

Alternative Work Arrangements

8-3 Explain how specific alternative work arrangements can motivate employees.

Another approach to enhancing motivation is to consider alternative work arrangements such as flextime, job sharing, and telecommuting.[29] These are likely to be especially important for a diverse workforce of dual-earner couples, single parents, and employees caring for a sick or aging relatives. For example, flextime and telework can help women continue to advance their careers after childbirth.[30] Furthermore, the advent of COVID-19 has renewed an interest in telecommuting as a potentially "permanent" shift in the workforce,

an establishment of a "new normal" in the working world.[31] Before the pandemic, only 15 to 27 percent of workers in the United States worked completely remotely.[32] In the midst of the pandemic, 67 percent of employers were taking steps to shift their employees toward remote work.[33]

But are alternative work arrangements here to stay? First, some research suggests that around 75 million U.S. employees are *capable of* working from home. This number represents over half (56 percent) of the workforce.[34] Second, about two-thirds of people wanted to continue working remotely,[35] and a whopping *98 percent* of over two thousand remote workers during COVID-19 expressed interest in working this way for the rest of their careers.[36] Third, a Gartner survey suggested that 74 percent of the executives surveyed would keep at least a portion of their workforce remote after the pandemic.[37] However, the influence of the pandemic did not just heighten interest in telecommuting—flextime and job sharing also received renewed interest, given that it was now easier for people to work whenever, wherever, juggle work and home commitments more flexibly, and use project management and digital versioning software (e.g., GitHub) to quickly pick up work where their coworkers left off.[38] Furthermore, COVID-19 continued the heightened interest in the new nature of work in the gig economy (described in the introductory chapter). The often flexible nature of gig work enabled many "frontline" workers to manage home demands while at the same time working when it was convenient for them.[39]

Flextime

Jim Ware, founder of Focus Consulting Group, notes that "if you're trying to build a first-rate culture that attracts and retains people, you better make sure you get the rewards piece right and part of that is autonomy."[40] Flexibility is a key attractive benefit that organizations can offer employees that helps make their lives easier by giving them a sense of control over when and where they do their work.[41] For example, Polen Capital Management doubled its workforce in three years after instituting a **flextime**, or "flexible work time," policy.[42] In countries such as Finland, the majority of full-time workers have a legal right to decide the location and timing for at least half of their working schedule.[43] Globally, a number of different flextime arrangements exist, from flexible mealtime, breaks and shifts to "compressed workweeks" (e.g., working longer each day for a shorter number of days each week).[44]

flextime Flexible work hours.

In one arrangement, flextime employees work a specific number of hours per week but may vary their hours of work within limits. As in Exhibit 8-2, each day consists of a common core, usually 6 hours, with a flexibility band surrounding it. The core may be 9:00 a.m. to 3:00 p.m., with the "virtual office" opening at 6:00 a.m. and closing at 6:00 p.m. Employees should be working during the common core period, but they may accumulate their other two hours around that. Some flextime programs allow employees to accumulate extra hours and turn them into days off. Some, like the Sterling-Rice Group, even allow employees to "craft" the nature of flexible work (see Myth or Science?): They propose, after being hired, how, when, and where they would like to complete the work and adjust accordingly as they work.[45] However, most organizations implement the "core business hours" approach to flextime (57 percent of employers) compared with other approaches (29 percent of employers not establishing a common core).[46]

Flextime has become extremely popular, and organizations reap benefits from it as well. For instance, the Society for Human Resource Management (SHRM) reports that organizations can experience enhanced productivity by boosting employee morale, providing employees the ability to work during

Myth or Science?

Job Crafting Is a Practical Way to Reduce Boredom and Burnout

What if you could make your work tasks feel less boring? Well, it turns out that job crafting, a relatively new approach to job design, could transform work that once felt meaningless into something that feels valuable. Job crafting describes how employees can customize their jobs by actively altering their tasks or interacting with others at work to capitalize on their unique skills and abilities. Job crafting has been studied and applied for many years within various organizations, from Fortune 500 companies to small nonprofits. In these companies, it is not uncommon to find employees at all levels and in all types of occupations engaging in job crafting. Employees who do so become more engaged and satisfied with their work, perform better, and develop greater personal resilience.

For job crafting to be successful, employees should draw on their strengths (e.g., specialized knowledge, a particular skill, etc.) to create value for others. For example, suppose you are an administrative assistant at a primary school. You might view your job primarily as filling out late slips and calling parents when their children are absent. Alternatively, through job crafting, you may begin to see your role more as a liaison. For instance, you could think about using your communication skills to ensure that students are supported both at school and at home.

Job crafting is not always beneficial or even practical. For example, job crafting can create more stress if you take on more work or change your work without understanding your manager's goals for those tasks. The degree to which job crafting can help with boredom and burnout depends on the type of job crafting utilized. A specific type of job crafting, *avoidance demands crafting*, is a strategy by which employees attempt to cope with extreme job demands. For example, you may engage in job crafting by taking on additional work that capitalizes on your skill set, but you avoid pressing demands you need to meet in your "official" job description. Employees using this type of job crafting may end up not meeting performance expectations, missing deadlines, and letting their supervisors and coworkers down. Furthermore, several studies have found avoidance demands crafting is likely to have other damaging consequences such as work intensification, health problems, and turnover.

There are also certain types of people who may be more likely to experience job crafting benefits. For example, those with a proactive personality are more likely to engage in job crafting behaviors. Some personality traits (e.g., agreeableness, conscientiousness, extroversion, and openness to experience) may predispose some employees to engage in job crafting. Finally, individuals with higher education levels are also more likely to job craft. Education helps to facilitate the acquisition of job knowledge and expertise, which then facilitates job crafting. Thus, while job crafting shows promising benefits for reducing boredom and burnout, employees must use the appropriate type of job crafting and be motivated to engage in job crafting.[47]

hours that better suit their natural energy cycles (e.g., morning larks versus night owls), potentially extending hours of operation, and reducing commuting challenges.[48] As an example, the Executive Education program at the MIT Sloan School of Management implemented flextime practices and found that employees were actually more productive, especially in the face of commuting challenges (e.g., Boston's harsh winters).[49] It appears as if flextime has become an important job design element for many employees—50 percent of employees cite flexible arrangements as a very important aspect of their job satisfaction, 34 percent stated that they would remain with their current employer because of flexible arrangements, and 15 percent would seek employment elsewhere in order to obtain more flexibility.[50]

Most of the evidence for flextime stacks up favorably. One review of over 40 studies suggests that flextime is related to positive work outcomes in general, but only weakly—the effects are much stronger when considering reductions in absenteeism and, to a lesser degree, improvements in productivity and schedule satisfaction.[51] Much less promising, the empirical evidence from over 100,000 employees suggests that, although flextime is weakly effective at reducing the

extent to which work interferes with family, it does not affect situations in which family interferes with work.[52]

However, flextime's effects on work–life balance are more nuanced than they might appear. For example, two studies of German employees suggest that, although flextime leads employees to set stronger work–life boundaries (which in turn makes them happier), these boundaries are not truly "set" unless the employees complete their daily goals at work.[53] These studies suggest that if flextime is used too much, it can undermine goal accomplishment. Furthermore, flextime's major drawback is that it is not applicable to every job or every worker. For example, some research suggests both young, healthy employees and older, unhealthy employees benefit the most from flextime.[54] It also appears that people who have a strong desire to separate their work and family lives are less apt to use flextime.[55] Those who ask for it are often stigmatized, which may be avoided if the majority of the organization's leaders adopt flexible hours to signal that flextime is acceptable.[56]

Job Sharing

job sharing An arrangement that allows two or more individuals to split a traditional full-time job.

Job sharing allows two or more individuals to split a traditional full-time job.[57] One employee might perform the job from 8:00 a.m. to noon and the other from 1:00 p.m. to 5:00 p.m., or the two could work full but alternate days. For example, actor-puppeteers Lizzie Wort and Ruth Calkin are now able to tour Britain doing what they love: performing as the Twirlywoos, puppets from a popular UK children's TV program.[58] This is now possible due to a theatre job share arrangement, which has the "potential to revolutionize" how actors approach touring and "open up possibilities… for performers with children."[59]

Only 10 percent of U.S. organizations offered job sharing in 2015.[60] Some of the reasons it is not more widely adopted include the difficulty of finding compatible partners to job-share and the historically negative perceptions of individuals not completely committed to their jobs and employers. However, eliminating job sharing for these reasons might be shortsighted. Job sharing allows an organization to draw on the talents of more than one individual for a given job. It opens the opportunity to acquire skilled workers—for instance, retirees and parents with young children—who might not be available on a full-time basis. From employees' perspectives, job sharing can increase motivation and satisfaction if they can work when they would not normally be able to do so.

An employer's decision to use job sharing is often based on policy and financial reasons. Two part-time employees sharing a job can be less expensive in terms of salary and benefits than one full-timer, but this may not be the case because training, coordination, and administrative costs can still be high. Ideally, employers should consider each employee and job separately, seeking to match the skills, personality, and needs of the employee with the tasks required for the job and considering that individual's motivating factors.

Telecommuting

As noted in the beginning of this section, people rarely had a choice regarding whether to work from home during the COVID-19 pandemic. Although full-time virtual work was only offered by about one in four employers before the pandemic, it was still becoming fairly prevalent, with 69 percent of employers offering it at least occasionally.[61]

Regardless, is working from home more effective? Do employees like working from home? For some, it might be close to the ideal job: no rush hour traffic, freedom to dress as you please, and potentially fewer interruptions (depending upon how tumultuous your family life is!). Others

Exhibit 8-2 Possible Flextime Staff Schedules

Schedule 1	
Percent Time:	100% = 40 hours per week
Core Hours:	9:00 A.M.–5:00 P.M., Monday through Friday (1 hour lunch)
Work Start Time:	Between 8:00 A.M. and 9:00 A.M.
Work End Time:	Between 5:00 P.M. and 6:00 P.M.
Schedule 2	
Percent Time:	100% = 40 hours per week
Work Hours:	8:00 A.M.–6:30 P.M., Monday through Thursday (1/2 hour lunch)
	Friday off
Work Start Time:	8:00 A.M.
Work End Time:	6:30 P.M.
Schedule 3	
Percent Time:	90% = 36 hours per week
Work Hours:	8:30 A.M.–5:00 P.M., Monday through Thursday (1/2 hour lunch)
	8:00 A.M.–Noon Friday (no lunch)
Work Start Time:	8:30 A.M. (Monday–Thursday); 8:00 A.M. (Friday)
Work End Time:	5:00 P.M. (Monday–Thursday); Noon (Friday)
Schedule 4	
Percent Time:	80% = 32 hours per week
Work Hours:	8:00 A.M.–6:00 P.M., Monday through Wednesday (1/2 hour lunch)
	8:00 A.M.–11:30 A.M. Thursday (no lunch)
	Friday off
Work Start Time:	Between 8:00 A.M. and 9:00 A.M.
Work End Time:	Between 5:00 P.M. and 6:00 P.M.

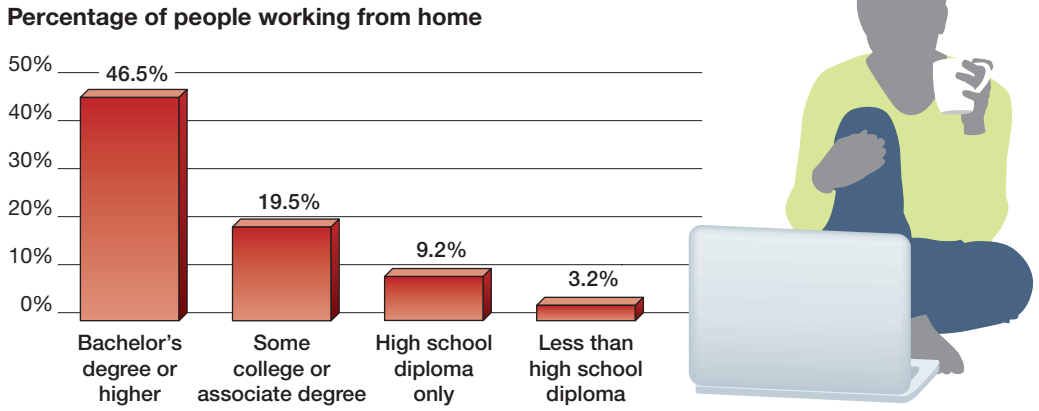
might be extremely apprehensive, worrying about the negative effects of virtual work on the work–life boundaries (such as those experienced during COVID-19)[62] as well as sustaining culture, cohesion, and communication within the workplace.[63] For instance, only 5 percent of executives think that employees do not need to be in the office or meet in person at all to maintain a company culture.[64] Furthermore, many dual-career couples with children had a much harder time with telecommuting during the pandemic, suggesting that telecommuting is only as good as the support received by telecommuters and their boundary management strategies.[65] **Telecommuting** refers to working at home or anywhere else the employee chooses that is outside the physical workplace.[66]

telecommuting Working from home or anywhere else the employee chooses that is outside the physical workplace.

What kinds of jobs lend themselves to telecommuting? McKinsey & Company have recently conducted a widespread study of over two thousand tasks from eight hundred jobs within nine different countries.[67] McKinsey researchers discovered that, at the industry level, most industries could on average telecommute for at least 29 percent of the time *without productivity loss.* Of course, this figure should be qualified by considering the specific industry. Finance, insurance, management, information technology, and other "knowledge worker" professionals can telecommute for greater periods of time without productivity loss than, say, manufacturing, construction, retail, and food service workers. As shown in the OB Poll, most

OB POLL

Who Works from Home?



Source: Bureau of Labor Statistics, "Job Flexibilities and Work Schedules—2017–2018: Data From the American Time Use Survey," *Bureau of Labor Statistics* [news release], September 4, 2019, https://www.bls.gov/news.release/pdf/flex2.pdf

telecommuters have attained high levels of higher education, demonstrating that many telecommuters are perhaps employed as knowledge workers. At the job-task level, it becomes clear that it is difficult for any job to be fully remote. Even tasks that are the most suitable for telecommuting (e.g., updating knowledge and learning, interacting with computers, and thinking creatively) cannot be done remotely on occasion (e.g., learning how to perform a medical surgery, setting up computer hardware in someone's home, creating a physical prototype for a new product).

Telecommuting has several benefits. It increases performance and job satisfaction; to a lesser degree, it reduces role stress and turnover intentions.[68] Employees who work virtually more than 2.5 days a week tend to experience the benefits of reductions in work–family conflict more intensely than those who are in the office the majority of their workweek.[69] Beyond the benefits to organizations and their employees, telecommuting has potential benefits to society. One study estimated that if people in the United States telecommuted half the time, carbon emissions would be reduced by approximately 51 metric tons per year. Environmental savings could come from lower office energy consumption, fewer traffic jams that emit greenhouse gases, and a reduced need for road repairs.[70]

Telecommuting has several downsides too. In today's team-focused workplace, telecommuting may lead to social loafing (i.e., employees shirking responsibility in a team setting), especially when the employees have many family responsibilities but their teammates do not.[71] Your manager working remotely can affect your performance negatively, as they may be less readily available to provide guidance or assistance.[72] Managers are also challenged to handle the demotivation of office workers who feel they are unfairly denied the freedom of telecommuters.[73] The COVID-19 pandemic in particular brought this issue to light, with many "essential workers" being unable to protect their health, reduce job stress, and manage their home obligations (e.g., caring for vulnerable relatives).[74] From the workers' standpoint, telecommuting can increase feelings of isolation as well as

reduce job satisfaction and coworker relationship quality.[75] On the other hand, it can help you "get away from them all" if your working situation is emotionally exhausting.[76] Research indicates that if you are forced to work from home, although you may experience less work–family conflict in general, you might still experience it if you work hours beyond the contracted workweek and are constantly "on call."[77] Telecommuters are also vulnerable to the "out of sight, out of mind" effect: Employees who are not physically present in the same location do not share in day-to-day informal workplace interactions, which may put them at a disadvantage when it comes to raises and promotions because they are perceived as not putting in the requisite face time (unless they put in the effort to do so virtually).[78] However, this may not be the case if telework is the norm with the organization, there is still common contact with the supervisor, and it is clear that the employee is working (e.g., they have a heavy workload and are productive).

If telecommuting is here to stay, what can employees and employers do to ensure the arrangements are effective? Apart from ensuring the arrangement is right for the position,[79] the success of telecommuting always depends on the quality of communications to establish good, though remote, working relationships. Even though telecommuting can be a motivating force in and of itself, it appears that even telecommuters need motivation and that the telecommuters themselves may be responsible for sustaining this motivation. For example, one recent study of telecommuters found that successful and satisfied telecommuters set goals for themselves, rewarded themselves when they did great work, and thrived with autonomy.[80] Further, using smart collaboration tools, communicating frequently, clear and transparent policies, and building trust among virtual team members can help improve the effectiveness of telework for the whole team.[81] During the COVID-19 pandemic, researchers developed the assess-create-support framework to help aid in establishing effective telecommuting practices.[82] This framework involves *assessing* employee telecommuting needs, *creating* practices that empower employees to maintain work–home boundaries, and *supporting* these practices through adjustment, encouragement, role-modeling, and monitoring. Indeed, adaptation may be an important component to the success of telecommuting, as tailored approaches to develop each employee's schedule may lead to better performance while working from home.[83] Telecommuting certainly does appear to make sense given changes in technology, the nature of work, and preferences of workers.

Employee Involvement

8-4 Describe how employee involvement measures can motivate employees.

Employee involvement and participation (EIP)[84] is a process that uses employees' input to increase their commitment to organizational success. If workers are engaged in decisions that increase their autonomy and control over their work lives, they will become more motivated, more committed to the organization, more productive, and more satisfied with their jobs. These benefits do not stop with individuals—when teams are given more control over their work, morale and performance increase as well.[85]

employee involvement and participation (EIP) A participative process that uses the input of employees to increase employee commitment to organizational success.

Examples of Employee Involvement Programs (EIP)

Let's look at two major forms of employee involvement—participative management and representative participation—in more detail.

Participative Management Common to all **participative management** programs is joint decision making, in which subordinates share a significant degree of

participative management A process in which subordinates share a significant degree of decision-making power with their immediate superiors.

decision-making power with their immediate superiors.[86] This sharing can occur either formally through, say, briefings or surveys or informally through daily consultations as a way to enhance motivation through trust and commitment.[87] For example, emergency medical service staff can meet to provide improvement opportunities based on their medical specialty areas—improvements to the process that can literally save lives.[88] Participative management has, at times, been considered a panacea or cure-all for poor morale and low productivity—indeed, evidence suggests that participative management reduces the negative effects of job insecurity on satisfaction and turnover intentions.[89] For participative management to be effective, however, followers must have trust and confidence in their leaders and be prepared for the change in management style, whereas leaders should avoid coercive techniques, stress the organizational consequences of decision making to their followers, and review progress periodically.[90]

Studies of the participation–organizational performance relationship have yielded more mixed findings.[91] Organizations that institute participative management may realize higher stock returns, lower turnover rates, and higher labor productivity, although these effects are typically not large.[92]

representative participation A system in which workers participate in organizational decision making through a small group of representative employees.

Representative Participation Many countries require companies to practice **representative participation**.[93] Representative participation redistributes power within an organization, putting labor's interests on a more equal footing with the interests of management and stockholders by including a small group of employees as participants in decision making. In the United Kingdom, Ireland, Australia, and New Zealand, representative participation was originally the only EIP program, formed to allow employee representatives to discuss issues outside union agreements, and the representatives were all from the union. However, representative groups are now increasingly a mix of union and nonunion, separate from the union arrangement.[94]

The two most common forms of representation are works councils and board representatives. Works councils are groups of nominated or elected employees who must be consulted when management makes decisions about employees. Board representatives are employees who sit on a company's board of directors and represent employees' interests. The influence of representative participation on working employees seems to be mixed, but generally an employee would need to feel their interests are well represented and make a difference to the organization for motivation to increase. Thus, representative participation as a motivational tool is surpassed by more direct participation methods.

Cultural Considerations in Implementing EIP Programs

To be successful, EIP programs should be tailored to local and national norms.[95] A study of four countries, including India and the United States, confirmed the importance of modifying practices to reflect national culture.[96] While U.S. employees readily accepted EIP programs, managers in India who tried to empower their employees were rated low by those employees. These reactions are consistent with India's high-power-distance culture, which accepts and expects differences in authority. The work culture in India may not be in as much transition as it is in China, where some employees are becoming less high-power-distance oriented. Chinese workers who were very accepting of traditional Chinese cultural values showed few benefits from participative decision making. However, Chinese workers who were less traditional were more satisfied and had higher performance ratings under participative management.[97] Another study conducted in



Bernd Osterloh, chair of Volkswagen's works councils, speaks to production line workers at company headquarters in Wolfsburg, Germany. Volkswagen (VW) includes employees in decision making by allowing them to participate in discussions about work rules, the company's finances and business plans, and workplace productivity and safety.

Source: Fabian Bimmer/Reuters

China showed that involvement increased employees' thoughts and feelings of job security, which enhanced their well-being.[98] These differences within China may well reflect the current transitional nature of Chinese culture. For example, research in urban China indicated that some aspects of EIP programs—namely, those that favor consultation and expression but not participation in decision making—yield higher job satisfaction.[99]

In sum, EIP programs clearly have the potential to increase employees' intrinsic motivation. The opportunity to make and implement decisions—and then see them work out—can contribute to all desirable organizational outcomes. Giving employees control over key decisions, along with ensuring that their interests are represented, can enhance feelings of procedural justice. But like any other initiatives, EIP programs must be designed carefully.

Using Extrinsic Rewards to Motivate Employees

8-5 Demonstrate how different types of extrinsic pay programs can influence employee motivation.

As we saw in the chapter on job attitudes, pay is not the only factor driving job satisfaction. However, it does motivate people, and companies often underestimate its importance. Approximately 47 percent of respondents to an SHRM survey indicated that they were staying with their current employer because of the pay. Furthermore, 62 percent of respondents indicated they were seeking a job outside their current organization because of the pay. In fact, pay was the number one reason employees both stayed and left their current organizations, compared with thirteen other reasons. (Benefits, career advancement opportunities, and work–life flexibility were also key factors.)[100]

Given that pay is so important, how can organizations develop competitive compensation strategies that retain employees and discourage them from

seeking employment elsewhere? How can they harness motivation theory and research to bolster their strategies? Incredibly, according to PayScale's 2021 Best Practices survey (the largest pay survey worldwide), *over half of organizations surveyed* admit to not having a compensation strategy at all.[101] In this section, we consider (1) what to pay employees (decided by establishing a pay structure) and (2) how to pay individual employees (decided through pay plans).

What to Pay: Establishing a Pay Structure

There are many ways to pay employees.[102] The process of initially setting pay levels entails balancing *internal equity*—the worth of the job to the organization (sometimes established through a technical process called job evaluation) and *external equity*—the competitiveness of an organization's pay relative to pay in its industry (usually established through benchmarking surveys).[103] Obviously, the best pay system reflects what the job is worth and also stays competitive relative to the labor market. Some organizations prefer to pay above the market. Other organizations may lag behind the market because they cannot afford to pay market rates or they are willing to bear the costs of paying below market (namely, higher turnover because people are lured to better-paying jobs). Some companies that have realized impressive gains in income and profit margins have done so in part by holding down employee wages,[104] whereas others use fair or competitive pay strategies as a way to engage and retain employees.[105]

Pay more, and you may get better-qualified, more highly motivated employees who will stay with the organization longer and perhaps be more likely to perform and innovate.[106] A study covering 126 large organizations found employees who believed they were receiving a competitive pay level experienced higher morale and were more productive, and customers were more satisfied as well.[107] But pay is often the highest single operating cost for an organization, which means paying too much can make the organization's products or services too expensive. Furthermore, the salience of money may even motivate employees toward self-serving behavior. For example, one study of National Hockey League (NHL) and National Basketball Association (NBA) players found that during the final contract year, players engage in more self-serving behaviors while in play.[108] It's a strategic decision an organization must make with clear trade-offs.

In the retail rivalry between Walmart and Costco, pay plays a primary role.[109] Over a decade ago, Walmart raised its pay to be more competitive with other big-box stores like Costco—but it cut employees' hours at the same time, much to the ire of employees. It is tempting to immediately conclude that the company that pays better will do better, but the situation is much more nuanced than that. The average worker at Costco is paid at a much higher rate when compared to workers at Walmart or its wholesale trade counterpart, Sam's Club. Costco's strategy involves a laser-like focus on its store operations and customer experience—it will get more if it pays more. Costco employs about two hundred thousand people and pays them a minimum of $15 an hour. Walmart, on the other hand, maintains a very large network of stores worldwide. Its costs are much higher than Costco's, and it needs to keep these stores stocked and operational. Worldwide, Walmart employs over two million people and pays its employees a base wage of $11 an hour on average. Given these different requirements and strategies, each organization has adopted different pay strategies. However, as we have seen in the prior chapter (and will continue to see in this chapter), pay clearly matters for employee motivation, attitudes, well-being, and turnover. We can conclude that employees will likely be happier and less likely to turn over at Costco when compared to Walmart.

How to Pay: Rewarding Individual Employees Through Variable-Pay Programs

"Why should I put any extra effort into this job?," asked Justice, a fourth-grade elementary schoolteacher in Denver, Colorado. "I can excel, or I can do the bare minimum. It makes no difference. I get paid the same. Why do anything above the minimum to get by?" Comments like Justice's have been voiced by schoolteachers for decades because pay increases were tied to seniority. However, many states have altered their compensation systems to motivate teachers by linking pay to results in the classroom, and other states are considering such programs.[110] Many organizations, public and private, are moving away from pay based on seniority or credentials. For instance, Japanese company Hitachi recently announced that it was moving away from seniority-based pay. Chairman Hiroaki Nakanishi noted that the model worked in its early days when new hires had to produce its products from scraps and learned from experience throughout their job tenure—but those days are gone, and the older model just does not work anymore.[111]

Piece-rate, merit-based, bonus, profit-sharing, and employee stock ownership plans are all forms of a **variable-pay program** (also known as pay for performance), which bases a portion of an employee's pay on some individual and/or organizational measure of performance.[112] The variable portion may be all or part of the paycheck, and it may be paid annually or upon attainment of benchmarks. It can also be either optional for the employee or an accepted condition of employment.[113] Globally, around 85 percent of companies offer some form of variable-pay plan.[114] Variable-pay plans have long been used to compensate salespeople and executives, but the scope of variable-pay jobs has broadened to include virtually all employment categories.

variable-pay program A pay plan that bases a portion or all of an employee's pay on some individual and/or organizational measure of performance.

Organizations often use a combination of organization-, unit-, and individual-level performance to allocate awards, with over half of the short-term incentive coming from the organization's overall performance and the other half attributable to a combination of individual and unit performance.[115] Although the COVID-19 pandemic had an immense impact on organizational pay strategies in 2020, it appears that pay increases are still on



The One IKEA Bonus program is a variable pay system for employees of the Swedish multinational conglomerate. To reward their work during the COVID-19 pandemic, IKEA gave a total of $128 million in bonuses to employees.
Source: Meritzo/Alamy Stock Photo

board for 2021, with 85 percent of companies globally still planning on pay increases.[116] In 2020, approximately 70 percent of organizations offered variable pay as a part of total compensation.[117]

Pay-for-Performance Efficacy Although pay-for-performance plans do have small positive effects on employee and group performance,[118] the results of pay-for-performance plans vary by several conditions. For instance, some research suggests that pay-for-performance is only effective in stable economic environments and in organizations that have fair policies.[119] There are cultural differences as well: When *guanxi* (e.g., specific, personal connections between subordinates, supervisors, and coworkers) plays a role in human resource (HR) practices, pay-for-performance plans tend to be less effective.[120] Pay-for-performance may also matter more at different times in an individual's tenure. One study of shareholder returns of the U.S. S&P's 500 firms suggests that pay-for-performance plans (including stock options and bonuses) are most effective for CEOs when they start out, and their relationship with shareholder returns slowly decreases over time; however, the relationship between traditional plans and shareholder returns increases over time.[121]

Regardless of these modest, positive effects, not all employees see a strong connection between pay and performance. Furthermore, the nature of *performance* also matters for how employees react to such plans. As we stated, teacher pay-for-performance plans are starting to be used more frequently, particularly those that are based on student test scores; research on thousands of teachers in the United States has shown that these programs (1) are not having a positive impact on teacher motivation or teaching practices and (2) have actually led to higher levels of stress, along with counterproductive work behaviors (CWBs), such as cheating and even bullying of students to perform better on tests.[122] As another example, research on inventors in corporate research and development (R&D) departments shows that rewards for inventions actually lead to reduced motivation, less collaboration between scientist coworkers, and even lower-quality inventions.[123] These examples highlight the potential role of expectancy and instrumentality discussed in expectancy theory (see the previous chapter). Do teachers have control over students' test scores? Do scientists have control over the outcomes of their innovation efforts? Expectancy or instrumentality breakdowns can be a very demotivating force indeed.

Pay-for-performance may also have a direct effect on workplace dynamics: When managers are subject to pay-for-performance, it leads to employer–employee relationship strain and can increase employee turnover.[124] Employees in these situations may also compete with their coworkers and may actively try to harm one another.[125] Also, some employees react more negatively to pay-for-performance, especially when they feel inequity or unfairness compared with other employees. For example, employees in Britain with disabilities tend to react more negatively to pay-for-performance than others.[126] Furthermore, although "star employees" may react well toward pay-for-performance plans and dispersion among employees,[127] average or underperforming employees may feel alienated by such plans, and managers may step in to make "exceptions" when these employees fall behind.[128] As a result, if the other employees become aware of these "special deals," they may begin to feel even more negatively and perform worse than they did before they were aware that these agreements were being made.[129]

Pay Secrecy Secrecy plays a role in the motivational success of variable-pay plans.[130] In some government and nonprofit agencies, pay amounts are either specifically or generally made public, but most U.S. organizations encourage or require pay secrecy.[131] Is this good or bad? Pay secrecy initially appears to

have a detrimental effect on job performance.[132] Individual pay amounts may not need to be broadcast to restore the balance, but if general pay categories are made public and employees feel variable pay is linked objectively to their performance, the motivational effects of variable pay can be retained.[133] On the other hand, pay transparency can also have negative effects: Research suggests that it can facilitate comparisons between people, leading coworkers to become jealous and abstain from cooperating or helping one another.[134] One thing seems to be clear: Justice perceptions (as discussed in the previous chapter) play a huge role in determining how employees react, regardless of the strategy.[135]

Types of Pay-for-Performance Plans Pay-for-performance is not a one-size-fits-all, unitary approach. There are multiple ways of implementing a pay-for-performance plan that each have their own unique benefits and limitations. In the sections that follow, we discuss these in more detail.

Piece-Rate Pay The **piece-rate pay plan** has long been popular as a means of compensating production workers with a fixed sum for each unit of production completed, but it can be used in any organizational setting where the outputs are similar enough to be evaluated by quantity.[136] A pure piece-rate plan provides no base salary and pays the employee only for what they produce. Ballpark workers selling peanuts and soda are frequently paid piece-rate. If they sell forty bags of peanuts for a dollar each, their take is $40. The more peanuts they sell, the more they earn. Alternatively, piece-rate plans are sometimes used in teams. For example, a ballpark worker would make money on the total number of bags of peanuts sold by the concessions team during a game.

piece-rate pay plan A pay plan in which workers are paid a fixed sum for each unit of production completed.

Piece-rate plans are known to produce higher effort, productivity, and wages, so they can be attractive to organizations and motivating for workers.[137] In fact, one major Chinese university increased its piece-rate pay for articles by professors and realized an increase of 50 percent in research productivity.[138] The chief concern of both individual and team piece-rate workers is financial risk. One study, for instance, found that 68 percent of risk-averse individuals (see the chapter on perception and decision making) prefer an individual piece-rate system and that lower performers prefer team piece-rate pay. Why? The authors suggested risk-averse and high-performing individuals would rather take their chances on pay based on what they can control (their own work) because they are concerned others will slack off in a team setting.[139] What about using both? Recent work suggests that doing so might address the limitations of using either in isolation: Across more than 22,000 European establishments, using both plans (combined with an EIP approach described earlier) led to stark increases in employee innovation.[140]

Organizations, on the other hand, should verify that their piece-rate plans are indeed motivating to individuals. When the pace of work is determined by uncontrollable factors such as customer requests rather than internal factors such as coworkers, targets, and machines, a piece rate plan is not motivating.[141] Either way, managers must be mindful of the motivation for workers to decrease quality and thus increase their speed of output.

While piece-rate plans can be a powerful motivator in many organizational settings, an obvious limitation is that they are not feasible for many jobs. An emergency room (ER) doctor and nurse can earn significant salaries regardless of the number of patients they see or their patients' outcomes. Would it be better to pay them only if their patients fully recover? It seems unlikely that most would accept such a deal, and it might cause unanticipated consequences as well (such as ERs turning away patients with terminal diseases or life-threatening injuries). Although incentives are motivating and relevant for some jobs, it is unrealistic to think they work universally.

merit-based pay plan A pay plan based on performance appraisal ratings.

Merit-Based Pay A **merit-based pay plan** pays for individual performance based on performance appraisal ratings.[142] If designed correctly, merit-based plans let individuals perceive a strong relationship between their performance and their rewards.[143]

Many organizations have merit pay plans, especially for salaried employees. Although skills-based pay is relatively uncommon (e.g., receiving pay based on maintaining a specialized skill set), the typical "end-of-year" bonus is given in about 26 percent of organizations.[144] Merit pay increases are incredibly common, but generally are a very small component of an organization's salary budgets (often between 0 and 4 percent of the entire budget).[145] A move away from merit pay, on the other hand, is coming from some organizations that do not feel it separates high and low performers enough. When the annual review and raise are months away, the motivation of this reward for high performers diminishes. Even companies that have retained merit pay are rethinking the allocation.[146] However, some data from a service-related organization suggests that when merit pay and bonuses (discussed later) are used in tandem, merit raises tend to be most effective at increasing job performance and preventing turnover—although bonuses may affect future performance to a larger extent.[147] Although you might think a person's average level of performance is the key factor in merit pay decisions, the projected level of future performance also plays a role. One study found that NBA players whose performance was on an upward trend were paid more than their average performance would have predicted. Managers of all organizations may unknowingly be basing merit pay decisions on how they *think* employees will perform, which may result in overly optimistic (or pessimistic) pay decisions.[148]

Despite their intuitive appeal, merit pay plans have several limitations. One is that they are typically based on annual performance appraisal data and thus are only as valid as the performance ratings, which are often subjective. This brings up issues of discrimination, as we discussed in the chapter on diversity, equity, and inclusion, in organizations. Research indicates that Black employees receive lower performance ratings than White employees and that there are demographic differences in the distribution of salary increases.[149] Lastly, unions typically resist merit pay plans. Relatively few teachers are covered by merit pay for this reason. Instead, seniority-based pay, which gives all employees the same raises, predominates.

bonus A pay plan that rewards employees for recent performance rather than historical performance.

Bonuses **Bonuses** are a significant component of total compensation for many jobs.[150] Once reserved for upper management, bonus plans are now routinely offered to employees in all levels of the organization. A recent survey, for instance, suggests that bonuses are now the most common variable-pay incentive, with approximately 53 percent of organizations offering them to employees.[151] The incentive effects should be higher than those of merit pay because, rather than paying for previous performance now rolled into base pay, bonuses reward recent performance. (Merit pay is cumulative, but the increases are generally much smaller than bonus amounts.) Bonuses can be directed toward a number of organizational aims, such as referring other employees as potential job candidates, team-level or company-wide performance bonuses, sign-on or hiring bonuses, or even those that are discretionary, rewarding excellent behaviors as they occur.[152] When times are bad, firms can cut bonuses to reduce compensation costs. Firms may even cut executive bonuses when in the face of scandal, often to signal to shareholders that they are taking the scandal seriously and working to address the situation.[153]

Bonus plans have a clear upside: They are motivating for workers. As an example, a study in India found that when a higher percentage of overall pay was reserved for the potential bonuses of managers and employees, productivity

increased.[154] This example also highlights the downside of bonuses: They leave employees' pay more vulnerable to cuts. This is problematic especially when employees depend on bonuses or take them for granted. "People have begun to live as if bonuses were not bonuses at all but part of their expected annual income," said Jay Lorsch, a Harvard Business School professor.

The way bonuses and rewards are categorized also affects peoples' motivation. Splitting rewards and bonuses into categories may increase motivation.[155] Why? Because people are more likely to feel they missed out on a reward if they do not receive one from each category and then work harder to earn rewards from more categories. Short-term bonuses can also have an effect: In a high-tech manufacturing factory, cash, family meal vouchers, and employee recognition (see later in this chapter) all increased performance by 5 percent, and *nonmoney*-based bonuses were actually more effective at improving performance.[156]

Profit-Sharing Plan A **profit-sharing plan** distributes compensation based on some established formula designed around a company's profitability.[157] Compensation can be direct cash outlays or, particularly for top managers, allocations of stock options. When you read about executives like Mark Zuckerberg, who accepts an absurdly modest $1 salary, remember that many executives benefit from other forms of income. In fact, Zuckerberg's net worth is over $100 billion; in 2019, he brought in over $23 million in earnings.[158] Of course, most profit-sharing plans are not so grand in scale. For example, Fiat Chrysler automobile workers were paid up to $8,000 in profit-sharing income in 2020.[159]

profit-sharing plan An organization-wide program that distributes compensation based on some established formula designed around a company's profitability.

Studies generally support the idea that organizations with profit-sharing plans have higher levels of profitability than those without them.[160] These plans have also been linked to higher levels of employee commitment, especially in small organizations.[161] Profit sharing at the organizational level appears to have positive impacts on employee attitudes; employees report a greater feeling of psychological ownership.[162] Profit-sharing plans motivate individuals to higher job performance when they are used in combination with other pay-for-performance plans.[163] Obviously, profit sharing does not work when there is no reported profit per se, such as in nonprofit organizations or often in the public sector. However, profit sharing may make sense for many organizations, large or small.

Employee Stock Ownership Plan An **employee stock ownership plan (ESOP)** is a company-established benefit plan in which employees acquire stock, often at below-market prices, as part of their benefits.[165] Research on ESOPs indicates they increase firm performance as well as employee satisfaction and innovation.[166] ESOPs have the potential to increase job satisfaction only when employees psychologically experience ownership.[167] Even so, ESOPs may not inspire lower absenteeism or greater motivation,[168] perhaps because the employee's actual monetary benefit comes with cashing in the stock at a later date.[169] Relatedly, in a study of nearly three thousand Chinese firms, ESOPs were not as strongly related with firm performance when combined with executive stock ownership plans and when employees had no control rights (e.g., no "say" in the management of the business).[170] Furthermore, a study of nearly two thousand European firms suggested that the stock-ownership predicts return on investment only when the employees trusted the managers and were culturally low on uncertainty avoidance (see the chapter on personality and values).[171] Thus, employees need to be kept regularly informed of the status of the business and can have the opportunity to influence it positively to feel motivated toward higher personal performance.[172]

employee stock ownership plan (ESOP) A company-established benefits plan in which employees acquire stock, often at below-market prices, as part of their benefits.

An Ethical Choice

Workers' Cooperatives

Workers' cooperatives are aimed at creating sustainable jobs for its owners/workers/members in order to generate wealth for their local community. Therefore, they differ from other enterprises in that their owners/workers/members seek to enhance their capacity to produce and serve their needs first, before pursuing profit maximization. Democratically, each worker owns one share, and all shares are owned by the workers.

The basis for the institutionalization of the modern cooperative movement was established in 1844 on the core principle of "one member, one vote," when a group of weavers founded their food cooperative, the Rochdale Society of Equitable Pioneers, which diversified rapidly by opening its own mills and a solidary savings fund. Promoting similar values of benevolent assistance, and a pioneer of the cooperative movement, Friedrich Wilhelm Raiffeisen founded a German association for self-procurement of food during the starvation winter of 1846–1847 and created the first cooperative lending bank in 1864. Today, Raiffeisenbanken and the International Raiffeisen Union (IRU) are powerful cooperative networks in Europe.

Employees who can decide how to allocate their own resources best, with their own considerations of work–family balance, are more committed to their jobs. As cooperative workers are empowered to make such decisions, they commit to their work, making their cooperatives successful. Additionally, cooperatives allow individual members to benefit from a pool of collective resources, allowing them to better market their products and negotiate prices. Cooperatives help enterprises' creation, development, and sustainability. Striking the balance between individual autonomy and common responsibility, between capitalism and socialism, the cooperative model is also sometimes viewed as immune to global economic crises.

One for all, all for one? Mondragón, which employs 80,000 people in 27 countries, was founded in Spain with the ideals of worker participation, solidarity, and equality; however, as it grew bigger, decision-making became more centralized, salary differentials increased, and job satisfaction dropped below that of employees of similarly sized private-owned companies—for example, a senior manager at Mondragón earns eight times the lowest-paid worker in the cooperative. In 2013, when Fagor, one of its constituents, had to declare bankruptcy after having run up debts of over €850 million ($1.2 billion), Mondragón decided not to lend Fagor any more money. Almost 5,500 workers lost their jobs in Spain, France, China, Poland, and Morocco. Such issues raise key questions: What are the limits of cooperative ideals? Is the cooperative model just ethical window-dressing for a ruthless business to hide behind?[164]

ESOPs for top management can reduce unethical behavior. For instance, CEOs are less likely to manipulate firm earnings reports to make themselves look good in the short run when they have an ownership share.[173] ESOPs are also tools that can be used for community wealth building, such as the Cleveland model of networked worker cooperatives in Ohio.[174] Of course, not all companies want ESOPs, and they will not work in all situations, but they can be an important part of an organization's motivational strategy.

Overall Evaluation of Variable Pay Do variable-pay programs increase motivation and productivity? Generally, yes, but as is clear from our discussion, their effectiveness depends on a multitude of considerations.[175] Many organizations have more than one variable-pay element in operation, such as an ESOP and bonuses, so managers should evaluate the effectiveness of the plan in terms of the employee motivation gained from each element separately and from all elements together. Managers should monitor their employees' performance-reward expectancy because a combination of elements that makes employees feel that their greater performance will yield them greater rewards will be the most motivating.[176] Furthermore, executives and managers should go to great lengths to anticipate and monitor the justice perceptions of employees, taking these ethical considerations to heart when deciding on a compensation strategy.

Using Benefits to Motivate Employees

8-6 Show how flexible benefits can motivate employees.

Now that we have discussed what and how to pay employees, let's discuss two other motivating factors organizations must decide: (1) what benefits and choices to offer (such as flexible benefits) and (2) how to construct employee recognition programs. Like pay, benefits are both a provision and a motivator.[177] Employee benefits now make up approximately a third of total compensation costs in organizations.[178] Whereas organizations of yesteryear issued a standard package to every employee, contemporary leaders understand that each employee values benefits differently. A flexible program turns the benefits package into a motivational tool.

Flexible Benefits: Developing a Benefits Package

Benefits packages can take on many forms, including health care, retirement savings, student loan repayment assistance, paid leave, work–life benefits, travel assistance, career development, and so on.[179] Can we assume that all people can benefit from each benefit equally? For instance, would a recently graduated college student benefit more from student loan repayment assistance less than an employee who graduated from college over ten years ago and already paid off all of their loans?

Consistent with motivation theory's thesis (discussed in the prior chapter) that organizational rewards should be linked to each employee's goals, **flexible benefits** individualize rewards by allowing each employee to choose the compensation package that best satisfies their current needs and situation. Flexible benefits can accommodate differences in employee needs based on age, marital status, partner's benefits status, and number and age of dependents. However, it is important to recognize that flexibility does not mean that certain benefits are not essential. On the contrary, most managers suggest that health care, retirement, and leave are three benefits that are essential and should be offered in some way. Compare this with housing assistance and travel, which are only rated as slightly important (and, perhaps, best treated flexibly).[180]

flexible benefits A benefits plan that allows each employee to put together a benefits package tailored to their own needs and situation.

Benefits in general can be a motivator for a person to go to work and for a person to choose one organization over another. But are flexible benefits more motivating than traditional plans? It is difficult to tell. Some organizations that have moved to flexible plans report increased employee retention, job satisfaction, and productivity. However, flexible benefits may not substitute for higher salaries when it comes to motivation.[181] As more organizations worldwide adopt flexible benefits, the individual motivation they produce will likely decrease. (The plans will be seen as a standard work provision.) In general, the downsides of flexible benefit plans may be obvious: They may be costlier to administer, and identifying the motivational impact of different provisions is challenging. For instance, organizational norms may play a huge role: Even though the company may offer benefits, whether employees are encouraged or discouraged from using them is a whole other issue.[182] In high-pressure work cultures, employees may be reluctant to use their vacation days to avoid missing work, falling behind, or appearing undedicated to their coworkers. In alignment with social learning theory (see the previous chapter), employees may be more likely to model the behavior of others in their work environment without considering what is right for them as individuals.

Furthermore, recent examinations of benefits programs also present an opportunity to demonstrate a commitment to socially responsible behavior.[183] However, sometimes members of underrepresented groups in

Toward a Better World

Sociabble Trees: Rewarding Through Reforestation

Sociabble is an online social media platform used by many organizations, including Coca-Cola, Microsoft, and L'oréal, for internal employee communications, social networking, collaboration, and performance management. Sociabble, for instance, offers a social selling dashboard that enables employee users to track their progress on several key performance indicators, like sales goals, within the app. Sociabble recently announced a new partnership with Tree-Nation, a nonprofit carbon emissions offset company. Tree-Nation enables people to plant trees in many locations worldwide to offset carbon emissions. Furthermore, Tree-Nation focuses on promoting biodiversity by planting different species of trees to replenish animal habitats, reduce erosion, and improve water quality. To date, Tree-Nation has worked with five thousand companies and planted 7.7 million trees worldwide, with the support of companies like Google, P&G, and Unilever.

This partnership between the two organizations, dubbed Sociabble Trees, is unique in that it enables organizations to *compensate* employee performance through corporate social responsibility (CSR)-relevant rewards (e.g., planting trees on their behalf). However, other organizations have dabbled in various forms of CSR-relevant rewards, like "voluntourism" (e.g., enabling employees to see new parts of the world for fun while volunteering abroad), CSR-related "swag" (e.g., T-shirts to commemorate their participation in events), or company-wide recognition; very few have systematically turned toward gifting or donating on the employees' behalf. Sociabble Trees works by gamifying day-to-day employee performance: For attending meetings, completing training, and creating content, among other actions, employees are rewarded by having trees planted on their behalf. Employees can also see where they stand in terms of trees planted compared with their coworkers via a leaderboard displaying their ranking, trees planted, and carbon emissions offset to date. Furthermore, Sociabble Trees provides a unique sense of significance and identity. Employees can see a visual depiction of their own "forest" and their company's collective "forest" online at any time (made possible, in part, by drone photography).

Has Sociabble Trees been a success so far? Cases of specific companies using the platform seem to suggest the answer is yes. For instance, SmartTrade has seen 80 percent company-wide engagement in the program and has planted hundreds of trees since adopting Sociabble Trees. Reena Wahi, senior vice president of human resources at Tata Realty, for instance, notes, "Sociabble Trees has helped us achieve two objectives—employee engagement and sustainability, both of which are extremely important." Others note that these rewards are more meaningful than typical rewards. As Geoffroy de la Grandière, a director at Adrian, said, "In just a few clicks, employees can win and plant a tree. It's something much more meaningful than winning an iPad."

But does OB science and research support the motivational power of CSR-relevant rewards? To date, not much is known about this topic. We do know that rewarding executives and employees for *engaging* in CSR-related actions can be successful in some situations (e.g., CEO bonuses tied to corporate social performance) and can even be activated by intrinsic motivations (e.g., a desire to enhance their status and reputation). However, the practice is not immune to opportunism and gaming the system to increase one's bonus. Furthermore, executives and managers tend to "follow the money" when it comes to rewarding for sustainable behavior compared with other organizational goals (e.g., cost-cutting). Still, not much research focuses on rewarding executives and employees *with* CSR-related rewards. In one study that did examine this phenomenon, the researchers suggest that employers may be inaccurate in assuming that all employees value CSR-relevant rewards in the same way. Employees who do not value environmental sustainability (and, perhaps, value different social causes more) may not care as much about the CSR-related reward and perhaps may even find it impersonal. Regardless, CSR-relevant rewards are a new frontier in OB research and practice. Future research may find additional ways to use this technique to make the world a better place.[185]

organizations also have less access to many important benefits. For instance, many people from underrepresented groups are unable to attain full-time employment with benefits at the same rate as other groups, leaving them without access to important medical benefits along with family and medical leave.[184]

Using Intrinsic Rewards to Motivate Employees

8-7 Identify the motivational benefits of intrinsic rewards.

We have discussed motivating employees through job design and through extrinsic rewards. On an organizational level, are those the only ways to motivate employees? Not at all! We would be remiss if we overlooked the intrinsic rewards that organizations can provide, such as employee recognition programs, discussed next. Recall from the prior chapter that although behaviorist approaches suggest that extrinsic rewards can be a powerful motivational force, so too does SDT suggest intrinsic rewards can benefit employee motivation.

Employee Recognition Programs

Let's start with an example. Jaime makes $9.50 per hour working at a fast-food job in Pensacola, Florida, and the job is not very challenging or interesting. Yet Jaime talks enthusiastically about the job, the supervisor, and the company he works for. "What I like is the fact that Carroll, my supervisor, appreciates the effort I make. Carroll compliments me regularly in front of the other people on my shift, and I have been chosen as Employee of the Month twice in the past six months. Did you see my picture on that plaque on the wall?"

Organizations are increasingly realizing what Jaime knows: Recognition programs and other ways of increasing an employee's intrinsic motivation work. An **employee recognition program** is a plan to encourage specific behaviors by formally appreciating specific employee contributions.[186] Employee recognition programs range from a spontaneous and private thank-you to widely publicized formal programs in which the procedures for attaining recognition are clearly identified. Many organizations have established employee recognition programs, and 59 percent integrate them into their talent management strategies, with 68 percent noting that the programs positively influence their retention and 56 percent noting that they positively influence their recruitment efforts.[187]

employee recognition program A plan to encourage specific employee behaviors by formally appreciating specific employee contributions.

As companies and government organizations face tighter budgets, nonfinancial incentives become more attractive. Walt Disney World, for example, prioritizes employee recognition as a part of its worker engagement strategy. It publicly recognizes employees with over a hundred different types of awards. The Walt Disney Legacy Award, one of the most prestigious awards, is given at a ceremony where peers recognize one employee for outstanding performance.[188] Multinational corporations like Symantec Corporation, Intuit, and Panduit have also increased their use of recognition programs. Companies like LinkedIn have enjoyed a whopping 95 percent retention rate for new employees due to the Bravo! program administered by Workhuman, a corporation that offers employee recognition programs.[189] Centralized programs across multiple offices in different countries can help ensure that all employees, regardless of where they work, can be recognized for their contribution to the work environment.[190]

Research suggests that financial incentives may be more motivating in the short term, but in the long run nonfinancial incentives work best.[191] Surprisingly, there is not a lot of research on the motivational outcomes or global use of employee recognition programs. However, some work indicates that employee recognition programs are associated with self-esteem, self-efficacy, and job satisfaction.[192] An obvious advantage of recognition programs is that they are

inexpensive: Praise is free![193] With or without financial rewards, they can be highly motivating to employees. Despite the increased popularity of such programs, though, critics argue they are highly susceptible to political manipulation by management. When applied to jobs for which performance factors are relatively objective, such as sales, recognition programs are likely to be perceived by employees as fair. In most jobs, however, performance criteria are not self-evident, which allows managers to manipulate the system and recognize their favorites. Abuse can undermine the value of recognition programs, demoralize employees, and even cause the person recognized to be ostracized. As one study showed, once a top performer was recognized, other members of the team whose contributions were not recognized may begin to distance themselves from that member.[194] These members may have unfair procedural justice perceptions (see the previous chapter) and begin to ostracize that employee as a result. Therefore, where formal recognition programs are used, care must be taken to ensure fairness. This might be accomplished by aligning employee recognition programs with organizational values and investing in the accuracy of the performance management and appraisal process.[195] Where they are not, it is important to motivate employees by consistently recognizing their performance efforts.

Summary

As we have seen in this chapter and the one before it, understanding what motivates individuals is essential for organizational behavior. In this chapter, we described how theory and research are put into practice to enhance employee motivation in the workplace. First, we described some of the inherent characteristics of jobs that make them motivating or demotivating, according to the job characteristics model (JCM). With knowledge of these characteristics in mind, we turned to how jobs can be designed and redesigned to harness their motivating potential. Practices like job enrichment, job rotation, and relational job design were a few such practices that may help accomplish this aim. With the advent of COVID-19, the spotlight in the world of work turned toward alternative work arrangements and their potential to motivate or demotivate employees. In that section, we discussed flextime, job sharing, and telecommuting as three significant ways organizations are making alternative work arrangements to the once typical nine-to-five in-person office arrangement. In the remainder of the chapter, we discussed how extrinsic rewards (such as pay and benefits) and intrinsic rewards motivate employees. Throughout the chapter, clear ties between motivation research and application were highlighted. To name a few, behaviorism, goal-setting theory, self-determination theory, and expectancy theory have appeared to have a substantial impact on motivation practice.

Implications for Managers

- Where possible, design and redesign jobs to harness employee motivation, focusing on the job characteristics model's elements.
- Consider alternative work arrangements to empower your employees to manage their work and home lives. Resist the urge to monitor and control employees closely—autonomy and flexibility can be highly motivating.
- Allow employees to participate in decisions that affect them. Employees can contribute to setting work goals, choosing their own benefits packages, and solving productivity and quality problems.
- Link rewards to performance. Rewards should be contingent on performance, and employees must perceive the link between the two.
- Check the motivation systems for inequity. Employees should perceive that individual effort and outcomes explain differences in pay and other rewards.

Gainsharing: Fair Shares?

POINT

Gainsharing is an employment benefit whereby a company's profits are shared with employees based upon their contribution to the gains that are achieved. Therefore, it is considered an incentive to make employees perform their best at work.

Employees who know that they will receive financial rewards if the company does well have a vested interest in their company's success. Gainsharing reinforces the employees' feelings of being recognized by their employer as responsible for their company's profitability. It gives employees a sense of ownership and accountability. Therefore, it empowers employees as they become business partners and feel more attached to their employer and adhere better to the company's objectives.

As gainsharing is a variable incentive, it seems only fair that the better you work, the better you are rewarded. It is also a self-funded system based on savings generated by improved performance. Provided that each individual's job performance is sufficiently tracked and recorded, you can tie individuals' performance to the company's bottom line. It thus fosters a culture of continuous improvement and helps promote positive change.

One other positive impact of gainsharing is that it sends the message that all of the employees contribute to the company's success and are working together on the same cooperative team toward this end. Gainsharing can therefore reinforce group cohesion and a collaborative work culture within a company—provided all employees are rewarded commensurately.

COUNTERPOINT

Usually, gainsharing plans result in stocks, bonds, or straight cash being distributed as a percentage of annual pay; for example, 1–2 percent for basic employees and up to 40 percent for senior executives. Thus, what if a top executive makes a critical decision that will increase the company's profit within a year, and by extension their related annual bonus, but with an outcome that might be detrimental in the long-run? In addition, less money is shared with employees in lower-paying jobs, and higher amounts in bonuses are shared with highly compensated employees. Is this fair?

The distribution formula behind any gainsharing system is key. Each employee needs to identify the extent to which their contribution really makes an impact, and more particularly, which part of the work that they delivered counts the most. Consider when happy, loyal patrons leave tips in a restaurant—should waiters share these tips with kitchen coworkers, seasonal and extra service staff, and the restaurant managers? In what proportion? Ultimately, it is the waiter who personalized the service, smiled at the guests, reformulated the order, and made upselling suggestions—all ways by which the waiter has performed better. Thus, gainsharing requires employees' participation and employers' transparency regarding performance measures and the distribution formula.

Finally, because it requires the involvement of all employees, gainsharing may increase the level of organizational stress, as everyone has more of a financial stake in the company's success.[196]

CHAPTER REVIEW

QUESTIONS FOR REVIEW

8-1 How does the job charactieristics model motivate individuals?

8-2 What are the major ways that jobs can be redesigned?

8-3 What are the motivational benefits of each of the alternative work arrangements?

8-4 How can employee involvement motivate employees?

8-5 How can the different types of variable-pay programs increase employee motivation?

8-6 How can flexible benefits motivate employees?

8-7 What are the motivational benefits of intrinsic rewards?

APPLICATION AND EMPLOYABILITY

There are many ways in which managers can apply motivation theory to concrete applications in organizations. This chapter on job design and redesign, alternative work arrangements, employee involvement and participation, and rewards and benefits is directly applicable to how OB can make you more employable. Future managers and professionals can use this toolkit in their future work assignments to harness motivation, ultimately reduce turnover, improve employee satisfaction and retention, and reduce workplace conflict. In this chapter so far, you have developed your leadership skills by pondering whether job crafting can reduce boredom and burnout, considered the pros and cons of working during time off in flexible work arrangements, examined ethical issues underlying sweatshops and worker safety, and considered how socially responsible outcomes can serve as rewards. In this section, you will continue to develop these skills, along with your communication and collaboration skills, by working with a group to design an organizational development and compensation plan for automotive sales consultants, considering how to deal with perceived injustice and unfairness in idiosyncratic deals, and deciding how to address high turnover and low productivity as an executive of a large trucking company.

EXPERIENTIAL EXERCISE Developing an Organizational Development and Compensation Plan for Automotive Sales Consultants

Break the class into groups of three to five.

You are on a team of human resource professionals for a new boutique car dealership that specializes in luxury vehicles. You have been tasked with designing an organizational development and compensation plan for the team of automotive sales consultants who have just been hired. Using what you know about the car sales consultant job (and O*NET, if available, for retail salespersons: https://www.onetonline.org/link/summary/41-2031.00), complete the following and answer each question as a group. Assume that the budget is moderate in size: not too lavish, not too meager.

Questions

8-8. As a group, consider each of the five job characteristics (skill variety, task identity, task significance, autonomy, and feedback). Then write down the amount of each characteristic you think the automotive sales consultant position has. To address each element of the five job characteristics (by improving the low elements or maintaining the high elements), develop a plan for how each characteristic can be improved or maintained.

8-9. Next, how important do you think employee involvement and participation will be in these positions? Develop a plan for how you will reasonably plan to include involvement or participation in designing these positions. Conversely, justify your reasoning for not having such a plan.

8-10. Think about what might be important (and reasonable) in terms of compensation for the automotive sales consultants. What types of rewards would you provide to the consultants? What type of plan would you select? What type of specific benefits packages would you make available?

ETHICAL DILEMMA Playing Favorites?

You were promoted to a management position a few months ago. You are responsible for leading a team of six people. The team has been working well together, which you credit to the fact that each member has clearly defined roles. However, one team member approaches you to request more flexible work hours as they have a young child. You know the team member is hardworking and diligent, and they assure you that they will continue to keep up with their workload. Although everyone on the team has a fixed schedule, you believe this is a reasonable request. Given you know the team member well, you approve the flexible schedule.

The following week, it is apparent that everyone on the team is aware that you allowed a team member to have a flexible schedule. You overhear two team members expressing their frustration that there have been some communication and coordination issues because of the team member's flexible schedule. They express that they wish they had been made aware or consulted about this change in the team member's schedule. Furthermore, some insinuate that you were "playing favorites" with this team member and that it was not fair to the rest of the team.

Flexible work arrangements or "idiosyncratic deals" are becoming more common in the workplace. I-deals have several positive benefits, including increased motivation and employee loyalty to the organization. Further, you are reasonably confident this was a decision that you were well within your power to make as a manager. However, it seems that the I-deal you made with one of your employees was not well received by your other team members.

Questions

8-11. In what ways do you believe providing special work arrangements or accommodations for employees impacts employee motivation? How does it help? How does it hurt?

8-12. Should the whole team have decided on the team member's schedule accommodations collectively? Why or why not?

8-13. How else might the manager have handled the situation to prevent potential issues, including a negative impact on the team's performance?[197]

CASE INCIDENT JP Transport

Kendall Smith, the CEO of the large trucking company JP Transport, is faced with a persistent problem. Year after year, the company has seen the driver turnover rate continue to increase. High driver turnover is characteristic of the entire trucking industry. Still, Smith is determined to find a long-term solution to this problem. In total, turnover costs the trucking industry roughly $8 billion annually. Smith attributes the primary reason for high turnover to long hours and requiring employees to be away from home for long periods. Smith is concerned that the lost productivity is a significant cost for the company.

Smith concludes that these lifestyle factors are simply part of the job, and as such, this job might not be the best fit for everyone. Unfortunately, these lifestyle factors are essential to the job, and truckers can do little to mitigate these effects. Instead, Smith proposes that the company institute an increase in driver pay. This pay increase would offset the job's less desirable qualities and hopefully attract new drivers looking for a high salary. Smith believes the additional personnel costs will be less than the cost of unmotivated and thus unproductive drivers. Ultimately, Smith thinks a pay increase will lower the turnover rate.

One year later, Kendall Smith is dismayed to find that the turnover rate only decreased moderately despite the substantial increase in drivers' salary. Kendall Smith, along with other executives at JP Transport, decides to gather feedback from current drivers. This feedback will enable them to understand the challenges better, including which challenges are most likely to lead drivers to leave the job. Following are a few examples of the feedback received from current drivers surveyed.

Luis (Driving for Seven Years)

"I love my job! I know many people might be surprised by that from the outside, but I think JP does a good job of making people feel a part of a community. You get to know the other drivers, even if you do not see them that often. The company also makes you feel like what you're doing matters. Even though it is hard to see because we're sort of behind the scenes, truckers play a big role in helping keep the country running with all of the supplies we deliver."

Cameron (Driving for Fifteen Years)

"I have been in this job for a while, so there are some things that I like about it. It is pretty decent pay for not having a college education. I never liked the idea of working a desk job, so the fact that I get to see different parts of the country and I am not stuck in an office is a pretty decent perk of the job. Over the years, though, I've seen there's more and more regulation. When I started, it was nice because I didn't have some manager hovering over my shoulder, telling me what to do. Now there are these ELDs [electronic logging devices] that keep track of driving hours. I mean, I know there's not much the company can do about that because the government mandated it. Still, it means less flexibility and pay for me. I can only work fourteen hours a day. I spend three of those hours at the shipping dock, and I do not get paid unless I'm driving. I know they're trying to make it safer and prevent accidents, but it'd be nice if I could get paid for those hours or at least not have them counted toward my hours."

Shelby (Driving for Five Years)

"So, obviously, there are not a whole lot of women driving trucks, but I like it pretty much. I like driving and having the freedom 'to be my own boss.' I always want to try to do the job better and faster than before. As far as challenges, I will say I've had to deal with my fair share of rude comments and gross behavior. First off, the men are rather skeptical of a female driver, so it's not the most welcoming for women, and it's like I have to prove myself all the time. Truck stops are just not a place you want to be because there are a lot of sketchy things that go on there."

Terrell (Driving for Three Years)

"Wow, I cannot believe it has only been three years. It feels like twenty! Probably no surprise, but this job is incredibly boring and monotonous. If I have to hear some of these talk shows and music again, I will lose it. After a while, even listening to the radio, podcasts, and audiobooks can't make it interesting. I want to find a job where variety is a good thing, unlike the trucking industry. Anything out of the ordinary, like a roadblock, for example, almost always ends up being a headache."

Exhibit A Retention Statistics 2019–2020

Percent of Drivers Staying With Trucking Company At Least							
	30 Days	60 Days	90 Days	120 Days	180 Days	270 Days	365 Days
January 2019	85.5%	76.2%	68.8%	62.3%	56.7%	45.6%	38.4%
February 2019	84.6%	76.3%	68.6%	62.1%	56.4%	45.7%	37.9%
March 2019	84.8%	76.4%	68.8%	59.7%	56.4%	45.4%	37.8%
April 2019	84.2%	75.9%	68.7%	59.8%	56.1%	44.5%	37.5%
May 2019	84.3%	75.8%	68.5%	59.6%	55.9%	45.7%	38.1%
June 2019	83.9%	75.4%	68.2%	60.1%	55.7%	45.4%	37.9%
July 2019	83.7%	75.5%	68.3%	59.7%	55.6%	45.1%	37.6%
August 2019	83.5%	75.2%	67.4%	59.5%	55.4%	45.6%	37.5%
September 2019	83.5%	75.6%	67.8%	59.3%	54.6%	45.1%	37.4%
October 2019	83.3%	74.8%	67.4%	59.4%	53.9%	44.9%	37.3%
November 2019	83.5%	74.9%	67.5%	59.3%	53.9%	44.7%	37.2%
December 2019	83.9%	74.3%	67.2%	59.5%	53.5%	44.8%	37.2%
January 2020	82.4%	74.9%	67.5%	59.3%	53.1%	44.6%	37.1%
February 2020	82.6%	74.3%	67.1%	58.9%	52.4%	45.6%	37.3%
March 2020	82.4%	74.5%	67.2%	58.8%	52.8%	44.8%	37.5%
April 2020	82.5%	74.3%	67.1%	58.9%	52.4%	44.5%	37.7%
May 2020	82.3%	74.8%	67.3%	58.6%	52.3%	44.6%	37.4%
June 2020	82.1%	74.2%	67.2%	58.7%	52.4%	44.5%	37.3%
Average	83.5%	75.2%	67.8%	59.6%	54.4%	45%	37.6%

Exhibit B Cost of Turnover Calculator:

Total Drivers: 10,000	
Annual Turnover: 70%	
Cost to Hire: $11,000	**Annual Turnover Cost:** $77,000,000

Kendall came up with several options to decrease driver turnover long-term after reviewing the drivers' feedback, driver turnover data (Exhibit A), and driver turnover costs (Exhibit B). Kendall plans to present these to the other executives to reach a consensus on which option to implement.

Questions

8-14. What would be the most effective option to increase employee motivation to stay and reduce the driver turnover rate? Why do you believe this option will be effective?

8-15. What other solutions could you see be effective at improving employee motivation and reducing the turnover rate? Why do you believe these solutions would be useful?

8-16. This chapter discusses the use of job redesign to reduce turnover. Do you think this is feasible in this case? Why or why not? If so, how should the job be redesigned?

9 Foundations of Group Behavior



Source: Freely Art/Shutterstock

LEARNING OBJECTIVES

After studying this chapter, you should be able to:

- **9-1** Distinguish between the different types of groups.
- **9-2** Describe the punctuated-equilibrium model of group development.
- **9-3** Show how role requirements change in different situations.
- **9-4** Demonstrate how norms exert influence on an individual's behavior.
- **9-5** Show how status and size differences affect group performance.
- **9-6** Describe how cohesion is related to group effectiveness.
- **9-7** Contrast the strengths and weaknesses of group decision making.

Employability Skills Matrix (ESM)

	Myth or Science?	An Ethical Choice	Point/ Counterpoint	Toward a Better World	Experiential Exercise	Ethical Dilemma	Case Incident
Critical Thinking & Creativity	✓		✓	✓	✓	✓	✓
Communication	✓	✓			✓	✓	✓
Collaboration	✓	✓	✓	✓	✓		✓
Self-Management	✓		✓		✓	✓	✓
Social Responsibility			✓	✓		✓	
Leadership		✓	✓	✓			✓
Career Management						✓	

CONFRONTING DEVIANT NORMS

Even though 90 percent of McDonald's U.S. locations are franchisee-owned, recent reports demonstrate a widespread pattern of discrimination, harassment, and abuse throughout the organization. A poll in 2020 found that 76 percent of 782 female workers surveyed had experienced at least one form of harassment while working at McDonald's. Many employees described being victims of harassment such as inappropriate touching and lewd comments. They followed through by reporting these incidents to franchisee managers, but not enough was done to address and prevent these issues from occurring again. In fact, 71 percent of employees surveyed reported facing punishment after reporting incidents of harassment. The CEO of McDonald's, Chris Kempczinski, announced that the company developed a set of "Global Brand Standards" in response to the allegations. These standards were written to ensure employees understand the expectations for safe and respectful workplace behavior.

Despite progress made through the #MeToo movement to stop sexual harassment and abuse, the restaurant industry continues to be plagued by issues of harassment. In this industry, a staggering 90 percent of women and 70 percent of men experience some form of harassment. The power dynamics between managers, supervisors, and frontline workers in the restaurant industry can create an environment (like those described by McDonald's employees) in which sexual harassment is ignored, tolerated, or normalized. As harassment comes to be considered a norm in a particular franchise or location, employees often do not feel comfortable confronting these individuals about their behavior.

The restaurant industry has other norms that contribute to the prevalence of harassment. A familiar saying, "The customer is always right," continues to be praised in the industry. However, norms that glorify the customer in this way may devalue and ignore the employee experience. For instance, studies show that service employees face harassment and mistreatment *from customers* daily but often do not report these incidents. Managers may also perceive sexual harassment as less harmful when exhibited by a customer rather than by an employee. Furthermore, restaurant employees' reliance on tips means that customers play an influential role in the evaluation and compensation of these employees. In a culture that emphasizes and rewards appearance, customers can further use this to justify their harassment of employees. As a result, restaurant workers are often more vulnerable to sexual harassment.

The question then is how can McDonald's and the restaurant industry ensure that these expectations for appropriate behavior become norms that are ingrained in their cultures? Bystander-intervention training shows promising results. It helps individuals who witness the harassment become allies in identifying and assisting the individuals who experience it. Training has also shown promise as it teaches managers and employees how to recognize, address, and confront harassment and inform them on the issue's seriousness. Furthermore, these strategies can help employees recognize that they all play a role in eliminating harmful norms and that these behaviors negatively impact the work environment for everyone.[1]

As individuals, we all belong to groups based on our occupations, organizations, departments, and many other categories. When we are part of a group, it changes our perception of the situation. The objective of this chapter is to set a foundation for understanding groups in the context of organizational behavior (OB). With this foundation in place, in the next chapter we describe work teams in organizations. As we unpack in the upcoming chapter on work teams, many consider groups and teams to be different concepts.[2] Groups do not need to collaborate and coordinate to meet group objectives—teams, on the other hand, need to collaborate and coordinate synergistically to achieve their goals. In this chapter, we turn toward familiarizing you with group concepts, showing you how groups form, interact, and make decisions, and outlining the characteristics that define groups. But first, let us begin by defining a group.

Defining and Classifying Groups

9-1 Distinguish between the different types of groups.

group Two or more individuals, interacting and interdependent, who have come together to achieve particular objectives.

In OB, a **group** is two or more individuals, interacting and interdependent, who have come together to achieve certain objectives. For example, consider a sales group from a regional office of a large insurance company: The group is responsible for selling insurance to local citizens, and each person on the team has come together to sell insurance for their organization.[3] We belong to many groups throughout our lifetime, but some are more salient than others

at certain times, and some group roles can even come into conflict (e.g., the demands of being a parent can collide with those of being a manager).[4]

Groups can be either formal or informal. A **formal group** is defined by the organization's structure, with designated work assignments and established tasks. In formal groups, the behaviors that team members should engage in are stipulated by and directed toward organizational goals. The members of an airline flight crew are a formal group, for example. In contrast, an **informal group** is neither formally structured nor organizationally determined and often meets to fulfill social needs or to bind employees with common interests. Three employees from different departments who regularly have lunch or coffee together are an informal group. These types of interactions among individuals, though informal, deeply affect their behavior and performance.

formal group A designated work group defined by an organization's structure.

informal group A group that is not defined by an organization's structure; such a group appears in response to other needs, such as social clubs or interest groups.

Social Identity

People often feel strongly about their groups, partly because shared experiences amplify our perception of events and can increase our sense of a bond with and trust toward others.[5] For example, consider Tom's Marine Sales, a local business in Crawfordsville, Indiana.[6] Celebrating its 50th anniversary, the company threw a party with the owners' closest friends and employees in attendance. The employees not only appreciate the history of the company and identify with its successes and losses (including the loss of Tom's wife and the company's cofounder, Joy) but also identify as a part of the Crawfordsville community. In fact, the mayor and county commissioners were on hand to present Tom's with a plaque to commemorate its service to the community. Our tendency to personally invest in the accomplishments of a group can be explained by **social identity theory**, which is in many ways a complementary concept to *social categorization* discussed in the chapter on diversity. Social categorization explains why people categorize others as belonging to different groups, whereas social identity explains why people identify with particular groups.

social identity theory Perspective that considers when and why individuals consider themselves members of groups.

Social identity theory proposes that people have emotional reactions to the failure or success of their group because their self-esteem gets tied to whatever happens to the group.[7] Employees might feel proud at the company's successes, feel angry and threatened when the company is threatened, or even feel *schadenfreude* (i.e., pleasure due to another's misfortune) when competitors suffer.[8] Wendy's social media group, for example, harnesses these emotions with



Jeffrey Webster, director of human resources at a Nissan plant in Mississippi, also serves as the director of the plant's gospel choir. Choir members are a diverse group of employees who identify with each other because they all share a love of singing and performing for fellow workers, company executives, state officials, and community events.

Source: Rogelio V. Solis/AP Images

Twitter "roasting wars" with fast-food rivals (sassy put-downs of other companies and their products).[9] Twitter fans and employees of Wendy's alike feel especially proud and identify with the company when Wendy's "burns" a competitor. Job applicants may also be more attracted to organizations that match with their own social identities. For instance, one study found that engineering job seekers were more attracted to LinkedIn job postings that conveyed social identities that fit with their own.[10] The same holds for "gig workers": People attracted to these occupations and who prefer them tend to prefer employment relationships that are more transactional and less social or emotional.[11]

People develop many identities through the course of their lives, and many of these cluster together (e.g., your extended family may also worship at the same temple or your coworkers may also be gym buddies).[12] You might define yourself in terms of the organization you work for, the city you live in, your profession, your religious background, your ethnicity, and/or your gender, among other characteristics. Over time, some groups you belong to may become more significant to you than others. A U.S. expatriate working in Rome might be very aware of being from the United States, for instance, but might not give national identity a second thought when transferring from Tulsa to Tucson.[13] On another note, an expatriate who has worked in dozens of countries over the decades may even begin to identify as an international cosmopolitan![14] Some of our social identities may be more or less salient in any given situation, or we may find that our social identities are in conflict, as described at the beginning of this section.[15] Regardless, these identity changes and transformations (e.g., maintaining, acquiring, or even losing identities) can have a drastic effect on people's health and well-being.[16]

Within our organizations and groups, we develop many identities through (1) *relational* identification, when we connect with others because of our roles, and (2) *collective* identification, when we connect with the aggregate characteristics of our groups. In the workplace, our identification with our groups is stronger than with our organizations (recall our discussion of *organizational identification* from the chapter on job attitudes), but both are important to positive outcomes in attitudes and behaviors.[17] If we have low identification with a group, we may experience decreased satisfaction and engage in fewer organizational citizenship behaviors (OCBs; see our description in the introductory chapter).[18] Immigrant workers, for example, often experience strained and threatened identities when they do not have inclusive, supportive supervisors or when they do not feel like they are a part of the local community. This often leads to high turnover rates for immigrants and migrants.[19] Even the words leaders use matter—when CEOs use *we* or *us* language (instead of *I* language), this signals to employees and stakeholders alike that they are a part of a group. For instance, one study spanning sixteen years found that use of this collective language was correlated with increased sales and return on investment.[20]

As we described in the chapter on diversity, social categorization (and social identity) processes can sometimes lead people to think of people who share their social identity as the *ingroup* and people from different groups as *outgroups*. In the chapter on diversity, equity, and inclusion in organizations, we described how this can be a strong source of prejudice and discrimination. People fall into the dangerous trap of believing that those who belong to different outgroups are "all the same," contributing to the polarization of people.[21] On the other hand, we tend to "play favorites" or see our ingroup as better than other people. For example, some research suggests that favoritism and not hostility might cause most discriminatory behaviors: "Hostility isn't integral to the definition of discrimination; you can treat people differently without being hostile to anyone."[22] By playing favorites with their own ingroup (e.g., people of the

same race/ethnicity, gender identity, etc.), employees and managers alike may be complicit in discrimination.

Now that we have learned about groups as entities and why they form (through social identification), we move next to discuss the group "life cycle": how groups form, interact, and disperse.

Stages of Group Development

9-2 Describe the punctuated-equilibrium model of group development.

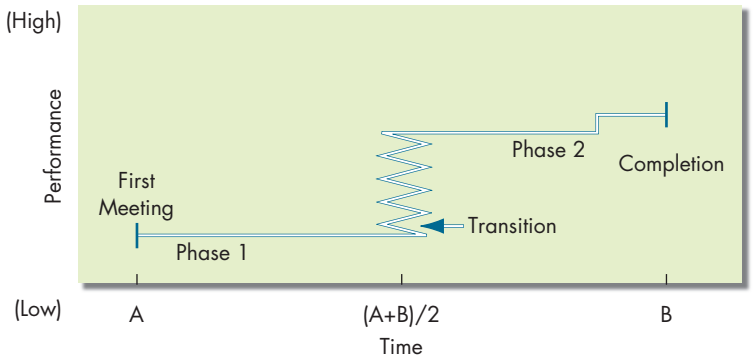
Temporary groups with finite deadlines pass through a unique sequencing of actions (or inaction) called the **punctuated-equilibrium model**, shown in Exhibit 9-1:

punctuated-equilibrium model A set of phases that temporary groups go through that involves transitions between inertia and activity.

1. The first meeting sets the group's direction.
2. The first phase of group activity is one of inertia and thus makes slower progress.
3. A transition takes place when the group has used up half its allotted time.
4. This transition initiates major changes.
5. A second phase of inertia follows the transition.
6. The group's last meeting is characterized by markedly accelerated activity.[23]

At the first meeting, the group's general purpose and direction are set. Then the group establishes a framework of assumptions and principles to which the group will conform. (Sometimes, these assumptions are implicit and automatic—formed in the first few seconds of the group's existence.) Once set, the group's direction is solidified and is unlikely to be reexamined throughout the first half of its life. This is a period of inertia—the group tends to stand still or become locked into a fixed course of action, even if it gains new insights that challenge initial patterns and assumptions. Groups experience a transition halfway between the first meeting and the official deadline—whether members spent an hour on their project or six months. The midpoint appears to work like an alarm clock, heightening members' awareness that their time is limited and that they need to get moving. This transition ends the first phase and is characterized by a concentrated burst of changes, dropping of old patterns, and adoption of new perspectives. The transition sets a revised direction for the next phase, in which the group executes plans created during the transition period. The group's last meeting is characterized by a final burst of activity to finish its work.

Exhibit 9-1 The Punctuated-Equilibrium Model



There are many models of group stages, but the punctuated-equilibrium model tends to be a dominant theory with strong support. Keep in mind, however, that this model does not apply to all groups but is suited to the finite quality of temporary task groups working under a time deadline.[24] Alternative models suggest that teams progress through a formation stage, a conflict resolution or "storming" stage, a "norming" stage where members agree on roles and make decisions, and a "performing" stage where members begin to work collaboratively. The forming, storming, norming, and performing stages may occur at phase one of the punctuated-equilibrium model, while a second performing and conforming stage may occur in the second phase, following a short period of reforming group norms and expectations.[25]

Apart from the identity bestowed by group membership and the ways in which groups are formed, there are several other defining properties that are important to understanding groups in organizations: *roles, norms, status, size,* and *cohesion*. We will discuss each in the sections that follow.

Group Property 1: Roles

9-3 Show how role requirements change in different situations.

The Independent Group was formed after eleven British members of Parliament (MPs) resigned from their political parties, forming a new group dedicated to reaching across party divides to further centrist political interests in the UK.[26] Although the group ultimately dissolved after the eleven were not reelected, each member of the group brought something different to the table. As another example, in the *Ocean's* movie series, each con artist had a different role in contributing to pulling off the heist (e.g., the "drivers," the "electronics," the "traps," the "grease," etc.). All group members play a **role**, a function assumed by someone occupying a given position in a group.

role A set of expected behavior patterns attributed to someone occupying a given position in a social unit.

We all take on several diverse roles, both at work and in life (e.g., partner, parent, poker champion, editor, professor). Different groups impose different role requirements on individuals. Many of these roles are compatible; some create conflicts. For example, if you were offered a job in Phoenix, but your family wanted to stay in Orlando, could the partner-parent-professional role demands be reconciled? Furthermore, how do we come to understand others' role requirements? We draw on our *role perceptions* to frame our ideas of appropriate behaviors and to learn the expectations of our groups. We also seek to understand the parameters of our roles to minimize *role conflict*. Let us discuss each of these facets.

Role Perception

role perception An individual's view of how to act in a given situation.

Our view of how we are supposed to act in a given situation is a **role perception**. We get role perceptions from stimuli all around us (e.g., our family, our coworkers, YouTube, etc.). For example, working, married parents identify strongly with their family roles and positively translate these roles into work roles, such as their leadership expectations.[27] However, research on U.S. marines suggests that even though some role perceptions do translate from context to context, some stay limited to their respective context (with marines "protecting" their work roles from becoming a part of their family life, for example).[28]

Role Expectations

role expectations How others believe a person should act in a given situation.

Role expectations are the way others believe you should act in a given context. A U.S. federal judge is viewed as having propriety and dignity, while a football coach may be seen as aggressive, dynamic, and inspiring to the players. Role



Les Hatton, manager of a Recreational Equipment, Inc. (REI) store in Manhattan, pumps up employees before the store's grand opening. Part of the psychological contract between REI and its employees is the expectation that salespeople will display enthusiasm and generate excitement while welcoming and serving customers.
Source: Matt Payton/AP Images

expectations influence role perceptions. For instance, if a supervisor expects their employee to innovate in their role, the employee is more likely to believe that creativity and innovation are a part of their role (even if it is not formally defined as such).[29] Similarly, leaders' voice and actions surrounding ethical issues influence the ethical role perceptions of followers.[30] Role expectations are also often emotionally and motivationally charged. For instance, supervisors may perceive employees' roles more optimistically than the employees themselves, in which case the pessimistic employees may exhibit diminished work engagement and performance.[31] A supervisor may be incredibly optimistic and excited to provide excellent customer service during tomorrow's big sale—the employees, on the other hand, might not share this same optimism.

In the workplace, we often look at role expectations through the perspective of the **psychological contract**: an unwritten agreement that exists between employees and employers (including senior management, supervisors, coworkers, recruiters, and gig workers) that establishes mutual expectations.[32] Although the terms of the psychological contract can change over time,[33] in general, management is expected to treat employees fairly, provide acceptable working conditions, clearly communicate what is a fair day's work, and give feedback on how well employees are doing. Employees are expected to demonstrate a good attitude, follow directions, and show loyalty to the organization. Unfortunately, employees can even be expected to be unethical by their employers—if they do not comply, they are often met with sanctions (e.g., insults, pressure) and may be perceived as being less warm.[34]

psychological contract An unwritten agreement between employees and employers that establishes mutual expectations.

What happens if management does not fulfill its part of the bargain? We can expect negative effects on employee performance, counterproductive work behavior (CWB), turnover, and dissatisfaction.[35] Conversely, if management fulfills its part of the bargain, employees are likely to feel grateful, identify with their organization, and be more willing to go above and beyond by performing OCBs.[36] Why might employees not play their part? Loss of resources, workload, stress (e.g., family interfering with work), a sense of wanting more than what the contract can offer, and other obstacles can limit the extent to which employees can fulfill their part of the bargain, causing their performance at work to suffer and them to be potentially passed up for promotions.[37] However, sometimes perceptions of our own and others' obligations can be tricky and complicate the situation. For instance, some employers who are "overly supportive" may

make employees nervous, causing them to feel they are obligated to do more in their role for their employer.[38] To deal with the complexity and reduce contract violations, both the physical and psychological contracts of gig workers tend to become more broad and less specific over time.[39]

Of course, the trust can be repaired between the two if either does not fulfill its part of the contract. For instance, some research suggests that forgiveness can help relieve emotional exhaustion following the breach of a psychological contract.[40] If you were the person who violated the contract, do not deny that the breach ever occurred (and take responsibility) if you want to rebuild trust.[41]

Role Conflict

role conflict A situation in which an individual is confronted by divergent role expectations.

interrole conflict A situation in which the expectations of an individual's different, separate groups are in opposition.

When compliance with one role makes it difficult to comply with another, the result is **role conflict**.[42] At the extreme, two or more roles may be clashing, like when professors are expected to be excellent teachers *and* researchers when they normally only have enough time to perform one of the roles well.[43]

Similarly, we can experience **interrole conflict** when the expectations of the different groups we belong to are in opposition.[44] As a primary example, many people hold multiple jobs, perhaps one that is primary (e.g., software engineer) and a secondary job (e.g., guitarist in a metal band). These jobs might inevitably come into conflict, and indeed, research shows that jobs like this can interfere with the primary job.[45] As a more common example, family/life roles can often conflict with work roles.[46] One American mother described how she was "scrambling after her son was born to accomplish two tasks: 'knitting back together' from her C-section and assembling a patchwork of enough disability leave, vacation and sick days, and unpaid time off, to rest briefly and care for her infant son before returning to work."[47] As another

Myth or Science?

Gossip and Exclusion Are Toxic for Groups

The preceding statement is not necessarily true, but it is counterintuitive. Let's explore the conditions.What is gossip? Most of us might say gossip is talking about others, sharing rumors, and speculating about others' behaviors; gossip affects a person's reputation. We might also say gossip is malicious, but according to researchers, it can serve positive social functions, too. Prosocial gossip can expose behavior that exploits other people, which can lead to positive changes. For example, if Jules tells Chris that Alex is bullying Summer, then Chris has learned about Alex's poor behavior through gossiping. Chris might refuse to partner with Alex on a work project, which might limit Alex's opportunities with the organization, preventing Alex from bullying more people. Alternatively, as the gossip spreads, Alex might feel exposed and vulnerable and conform to group expectations against bullying behavior. In fact, according to research, Alex is likely to cooperate with the group in response to the gossip, and others hearing and spreading the gossip are likely also to cooperate by not acting on their impulses toward bad behavior.

What about excluding Alex? There are two types of exclusion in the workplace: leaving someone out of a group and ostracizing an individual. Both lead to the same end—the person is not part of the group. While simply leaving someone out of a group might not send a message of exclusion, ostracism certainly does. Ostracism is more of a felt punishment than gossip because it is more direct. Research indicates that ostracized individuals cooperate to a greater degree when they are around the group to show a willingness to conform, hoping to be invited back into the group.

Can gossip and ostracism work together? Yes, according to one study. When subjects were given an opportunity to gossip about the work of another subject, that subject cooperated more than before; when the opportunity to gossip was paired with the ability to ostracize, that subject cooperated to a much greater degree. Thus, gossip and exclusion may provide groups with benefits, at least when the gossip is confined to truthful work-related discussion, when the opportunity still exists to rejoin the group with full standing, and when the group norms are positive.[54]

example, nurses may unexpectedly find themselves in a disaster (e.g., a hurricane or mass shooting) where they are required to calmly provide aid for someone (their professional role) who is close to them, regulating emotions they are experiencing that stem from their attachment to that person (the relational role).[48]

Indeed, research demonstrates that role conflict is a significant source of stress for most employees.[49] Furthermore, during mergers and acquisitions, employees can be torn between their identities as members of their original organization and of the new parent company.[50] Multinational organizations have also been shown to lead to dual identification—with the local division and with the international organization.[51] Although the typical function of role conflict is to be a major stressor that is difficult to balance, some employees do find creative ways of coping and adjusting to the conflict, especially when they adopt a mindfulness mindset (see the chapter on stress and health).[52] Furthermore, managers can be of help by providing the support employees need to do their jobs, especially for newer employees experiencing the competing demands of doing their job and "learning the ropes."[53]

Group Property 2: Norms

9-4 Demonstrate how norms exert influence on an individual's behavior.

San Francisco startup Gusto designed its office as if it were a living room, with a "no shoes" policy (although sandals and slippers are permitted, if you must).[55] Why do we wear shoes indoors to begin with, and why do we take them off in some environments (Gusto, some people's houses) and not in others (Best Buy)? The answer can be found in norms.

All groups have established **norms**—acceptable standards of behavior shared by members that express what they ought to do and ought not to do under certain circumstances. Different groups, communities, and societies have different norms, but they all have them.[56] Norms are not just leader-established, opinion-driven policies: For them to be adopted (and not abandoned after three days), they need to be accepted by all.[57]

norms Acceptable standards of behavior within a group that are shared by the group's members.

Let us discuss the levels of influence that norms can exert over us, starting with our emotions.

Norms and Emotions

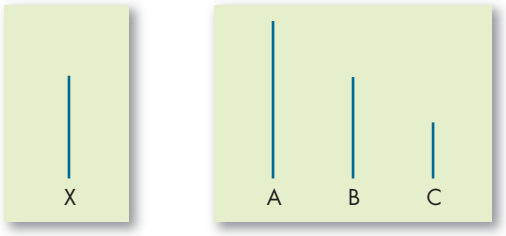
The emotions of group members, especially those who work together daily, can amplify the power of norms. Coworkers, for example, may react negatively to you coming in sick for work and may be angry and uncivil toward you.[58] Norms can even dictate the *experience* of emotions for the individuals and for their groups—in other words, people grow to interpret their shared emotions in the same way.[59] For example, team members experience moral emotions (see the chapter on emotion and moods) as a result of perspective-taking within the context of their group's norms, leading employees to respond to ethical situations in different ways (e.g., acting with sympathy/compassion, derogating unethical behavior, or trying to make the situation right).[60]

Norms and Conformity

As a member of a group, you desire acceptance and stability. Thus, you may conform to group norms when you perceive that others are doing so.[61] Considerable evidence suggests that groups can place strong pressures to change to match the group's standards.[62] The impact that group pressures for **conformity** can have on an individual member's judgment was demonstrated in studies by Solomon

conformity The adjustment of one's behavior to align with the norms of the group.

Exhibit 9-2 Examples of Cards Used in Asch's Study



Asch and others.[63] Asch formed groups of seven or eight people who were asked to compare two cards. One card had one line, and the other had three lines of varying length, one of which was identical to the line on the one-line card, as Exhibit 9-2 shows. The difference in line length was obvious; in fact, participants were incorrect less than 1 percent of the time in announcing which of the three lines matched the single line.

The experiment began with two rounds of matching exercises, in which each participant was called upon to match the card to its identical counterpart. Everyone gave the right answers. On the third round, however, the first participant, who was part of the research team, gave an obviously wrong answer—for example, saying "C" in Exhibit 9-2. The next participant, also on the research team, gave the same wrong answer, and so forth. Now the dilemma confronting the participant, who did not know the others were on the research team, was this: publicly state a perception that differed from the position of the others or give an incorrect answer that agreed with the others.

The results over many experiments showed 75 percent of subjects gave at least one answer that conformed—that they knew was wrong but was consistent with the replies of other group members—and the average conformer gave wrong answers 37 percent of the time. This suggests we feel pressure to conform with group norms.[64] But does that mean we are mere robots? Certainly not. We do not tend to like the pressure we feel to conform. Asch wrote, "Those who participated in this challenging experiment agreed nearly without exception that independence was preferable to conformity."[65] Do individuals conform to the pressures of all groups to which they belong? Again, obviously not. When they *do* conform, it is most likely to their **reference groups**, important groups in which people are aware of other members, define themselves as members or would like to be members, and feel group members are significant. Conformity effects are not always bad: For example, people can conform to prosocial norms, such as generosity in donating, and can even feel more empathy as a result.[66]

reference groups Important groups to which individuals belong or hope to belong. People are motivated to conform to and adopt the norms of these groups.

Norms and Behavior

Norms can cover any aspect of group behavior.[67] As we have mentioned, norms in the workplace significantly influence employee behavior. This may seem intuitive, but full appreciation of the influence of norms on worker behavior did not occur until the Hawthorne Studies conducted between 1924 and 1932 at the Western Electric Company's Hawthorne Works in Chicago.[68]

In the studies, the researchers first examined the relationship between the physical environment—specifically, the amount of light on the shop floor—and productivity. As they increased the light level for the experimental group of workers,

output rose for that unit and the control group. But as they dropped the light level, productivity continued to increase. In fact, productivity in the experimental group decreased only when the light intensity had been reduced to that of moonlight, leading researchers to believe that group dynamics, rather than the environment, influenced behavior.

The researchers next isolated a small group of women assembling telephones so their behavior could be observed more carefully. Over the next several years, this small group's output increased steadily, and the number of personal and sick absences was approximately one-third of that in the regular production department. It became evident that this group's performance was significantly influenced by its "special" status. The members thought they were in an elite group and that management showed concern about their interests by engaging in experimentation. In essence, workers in both the illumination and assembly experiments were really reacting to the increased attention they received.

Finally, the researchers implemented a wage incentive plan for employees in the bank wiring observation room. The most important finding was that employees did not individually maximize their output. Rather, their role performance became controlled by a group norm. Members were afraid that if they significantly increased their output, the unit incentive rate might be cut, the expected daily output might be increased, layoffs might occur, or slower workers might be reprimanded. So the group established its idea of a fair output—neither too much nor too little. Members helped each other ensure their reports were nearly level, and the norms that the group established included a number of behavioral "don'ts." *Don't* be a rate-buster—turning out too much work. *Don't* be a chiseler—turning out too little work. *Don't* squeal on any of your peers. The group enforced its norms with name calling, ridicule, and even punches to the upper arms of violators. It thus operated well below its capability, using norms that were tightly established and strongly enforced.

Positive Norms and Group Outcomes

Positive group norms may well beget positive outcomes, but only if other factors are present, too. Overall, evolutionary explanations of norms suggest they were developed so that we can observe positive outcomes: For example, groups facing a high degree of threat develop strong interaction and cooperation norms as well as norms to punish deviants.[69] This may be why we observe differences in cultural norms across the globe.

As an example of the positive effect of positive norms, one goal of every organization with corporate social responsibility (CSR; see the introductory chapter) initiatives is for the organization's values (or the values of the CEO and executives) to hold normative sway over employees.[70] After all, if employees aligned their thinking with the organization's positive norms, these norms would become stronger, and the probability of positive impact would grow exponentially. Some research in Germany indicates that this may be a function of how satisfied people are with their groups, with more satisfied employees more likely to adopt the CSR norms.[71]

However, norms that may appear to be positive and functional on the surface may lead to undesirable outcomes. One study of firefighters and nurses found that even though family-friendly benefits were intended to be used and effectively reduce work–family conflict, workers were less likely to use these benefits if they perceived that others in their work group did not use them.[72] Interestingly, some research also suggests that when trying to promote diversity in the workplace, raising awareness for the prevalence of stereotyping can backfire and can actually lead to more stereotype-consistent behavior.[73]

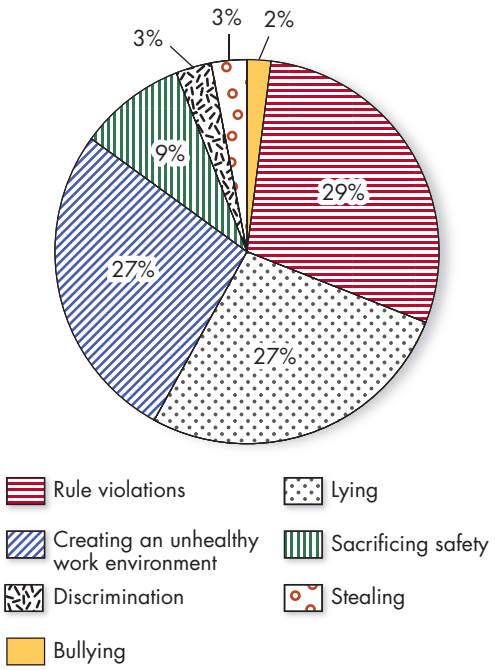
Negative Norms and Group Outcomes

As we discussed in the introductory chapter, *unethical behavior* (sometimes referred to as *deviance* and also simultaneously a CWB; see the chapter on job attitudes) is voluntary behavior that violates norms and, in so doing, threatens the well-being of the organization or its members. Exhibit 9-3 provides a typology of unethical or deviant behaviors, with examples of each. Negative norms operate to facilitate poor group outcomes and deviant behavior. As some examples, group member and supervisor absences set the tone for the office: If team members do not show up and if the supervisor does not show up, most employees will probably not show up.[74] The OB Poll illustrates some of the most common forms of unethical, deviant behavior in organizations.

Few organizations will admit to creating or condoning conditions that encourage and maintain deviant behaviors. Yet they exist. For one, as we discussed before, a work group can become characterized by positive or negative attributes. When those attributes are negative, unethical or deviant behaviors may be observed more frequently: As some researchers suggest, "bad apples" come from "bad barrels."[75] Second, employees can be mistreated by their supervisors, their coworkers, and even their customers, which can cause them to engage in unethical behaviors as a result.[76] Mistreatment of this type is important to organizational retention efforts, as nearly half of employees who have suffered this incivility say that it has led them to think about changing jobs; 12 percent actually quit because of it.[77] Finally, as organizations have tried to do more with less, pushing their employees to work extra hours, they may be indirectly facilitating deviant behavior.[78]

OB POLL

What Types of Workplace Deviance Are Most Common?



Source: Based on Z. Ivcevic, J. I. Menges, and A. Miller, "How Common Is Unethical Behavior in US Organizations?," *Harvard Business Review*, March 20, 2020, https://hbr.org/2020/03/how-common-is-unethical-behavior-in-u-s-organizations

Exhibit 9-3 Typology of Unethical or Deviant Workplace Behavior

Category	Examples
Production	Leaving early Intentionally working slowly Wasting resources
Property	Sabotage Lying about hours worked Stealing from the organization
Political	Showing favoritism Gossiping and spreading rumors Blaming coworkers
Personal aggression	Sexual harassment Verbal abuse Stealing from coworkers

Sources: Based on S. H. Appelbaum, G. D. Iaconi, and A. Matousek, "Positive and Negative Deviant Workplace Behaviors: Causes, Impacts, and Solutions," *Corporate Governance* 7, no. 5 (2007): 586–98; and R. W. Griffin and A. O'Leary-Kelly, *The Dark Side of Organizational Behavior* (New York: Wiley, 2004).

Like norms in general, employees' antisocial actions are shaped by the group context within which they work. Evidence demonstrates deviant workplace behavior is likely to flourish where it is supported by group norms.[79] For example, workers who socialize either at or outside work with people who are frequently absent from work are more likely to be absent themselves.[80] Thus, when deviant workplace norms surface, employee cooperation, commitment, and motivation are likely to suffer.

What are the consequences of workplace deviance for groups? Some research suggests a chain reaction occurs in groups with high levels of dysfunctional behavior.[81] The process begins with negative behaviors like shirking, undermining coworkers, or being generally uncooperative. As a result of these behaviors, the group collectively starts to have negative moods. These negative moods then result in poor coordination of effort and lower levels of group performance.

Norms and Culture

Do people in collectivist cultures have different norms than people in individualist cultures? Of course they do—even to the extent that some norms are undetectable or not understood by *outgroup* members.[82] But did you know that our orientation may be momentarily changed within a group context, even after years of living in one society? In one study, an organizational role-playing exercise was given to a neutral group of subjects; the exercise stressed either collectivist or individualist norms. Subjects were then given a task of their personal choice or were assigned one by an ingroup or outgroup person. When the individualist-primed subjects were allowed personal choice of the task or the collectivist-primed subjects were assigned the task by an ingroup person, they became more highly motivated.[83]

Regardless of these temporary shifts, cultural norms can affect many behaviors in the workplace, such as what negotiation strategy to select. (Aggressive strategies are more often used in honor and face cultures, like Qatar and China, relative to dignity cultures like the United States.)[84] The negotiation results are surprising, considering that employees in Asian cultures value harmony and cooperation in interpersonal interactions but will do what they can to compete and save face in professional contexts. Cultural norms can even influence how people respond to those who violate the norm. For instance, norm violators in

collectivist cultures (see the chapter on personality and individual differences) are seen as less powerful and evoke more moral outrage than in individualistic cultures.[85]

Group Property 3: Status and Group Property 4: Size and Dynamics

9-5 Show how status and size differences affect group performance.

Have you ever noticed how groups tend to stratify into higher- and lower-status members? Sometimes the status of members reflects their status outside the group setting, but not always. Groups can also vary by size in ways that affect members' behaviors, dynamics, and group outcomes. Let us examine how these factors affect a work group's efficacy.

Group Property 3: Status

status A socially defined position or rank given to groups or group members by others.

Status—a socially defined position or rank given to groups or group members by others—permeates every society.[86] Even the smallest group shows differences in member status over time. Status is a significant motivator and has major behavioral consequences when individuals perceive a disparity between what they believe their status is and what others perceive it to be.

status characteristics theory A theory stating that differences in status characteristics create status hierarchies within groups.

What Determines Status? According to **status characteristics theory**, status tends to derive from one of three sources:[87]

1. **The power a person wields over others.** Because they likely control the group's resources, people who control group outcomes tend to be perceived as high status.
2. **A person's ability to contribute to a group's goals.** People whose contributions are critical to the group's success tend to have high status.
3. **An individual's personal characteristics.** Someone whose personal characteristics are positively valued by the group (good looks, intelligence, money, or a friendly personality) typically has higher status than someone with fewer valued attributes.

Status and Norms High-status individuals may be more likely to deviate from norms when they have low identification (social identity) with the group.[88] They also eschew pressure from lower-ranking members of other groups. For instance, physicians actively resist administrative decisions made by lower-ranking medical insurance company employees.[89] High-status people are also better able to resist conformity pressures than their lower-status peers. An individual who is highly valued by a group but does not need or care about the group's social rewards is particularly able to disregard conformity norms.[90] In general, bringing high-status members into a group may improve performance, but only up to a point, perhaps because these members may introduce counterproductive norms.[91] For instance, high-status employees in organizations may be more likely to justify unethical behaviors as necessary and ethical, doing less to reject unethical practices on principle.[92] They do not control everything, though: Gossip can both confer status and damage reputations.[93]

Status and Group Interaction People tend to become more assertive when they seek to attain higher status in a group,[94] especially when they are already of higher status in other groups.[95] They speak out more often, criticize more, give more commands, use more jargon to sound proficient, do more

favors for others, and interrupt others more often.[96] Conversely, some evidence suggests that those who *do* have higher status tend to conceal it to promote harmony.[97] Lower-status members tend to participate less actively in group discussions; when they possess expertise and insights that could aid the group, failure to fully utilize these members reduces the group's overall performance. Supervisors can help here by encouraging these employees to speak up.[98] But that does not mean a group of only high-status individuals would be preferable. Adding *some* high-status individuals to a group of mid-status individuals may be advantageous because group performance suffers when too many high-status people are in the mix.[99]

Status Inequity It is important for group members to believe the status hierarchy is equitable. Perceived inequity creates disequilibrium, which inspires various types of corrective behaviors. Hierarchy can lead to negative emotions and resentment among those at the lower end of the status continuum.[100] Large differences in status within groups are also associated with poorer individual performance, lower health, and more pronounced intentions for the lower-status members to leave the group.[101] This is also true for gig workers and contractors; when they perceive disparity in status between themselves and their clients, they are less likely to be committed to them or their own contracting employer and may be more likely to leave the employment relationship.[102] Generally, inequity in power-based forms of status tends to have more negative effects: It tends to drive interpersonal conflict, whereas other forms promote healthy competition for status advancement.[103]

Groups generally agree within themselves on status criteria; hence, there is usually high concurrence on group rankings of individuals. Business executives may use personal income or the growth rate of their companies as determinants of status. Government bureaucrats may use the size of their budgets, and blue-collar workers may use their years of seniority. Managers who occupy central positions in their social networks are typically seen as higher in status by their subordinates, and this position actually translates into greater influence over the group's functioning.[104] Regardless of one's status, however, accurate knowledge of the status hierarchy (i.e., "who is who in my group") leads to better performance and results in effective within-group networking.[105]



Aaron Rodgers has high status as the quarterback of the Green Bay Packers football team. His status derives from his ability to contribute to his team's success in winning games. Rodgers's teammates and coaches value his character, leadership skills, expertise in calling plays, and ability to throw touchdown passes accurately while on the move.
Source: Cal Sport Media/Alamy Stock Photo

An Ethical Choice

Managing a Narcissist in the Group

It may seem like a certain level of narcissism is needed to advance in an organization, as self-promotion can be a valuable asset in terms of standing out among your competitors. Furthermore, narcissistic people can also be very charismatic and driven, enabling them to excel in adaptive or chaotic environments. On the other hand, narcissists can create challenges for groups. For example, narcissists have been found to scoff when assigned to low-status roles. They often become less satisfied and react more defensively than less-narcissistic individuals assigned to similar roles. Furthermore, narcissists prioritize their own interests ahead of those of the group. They are not as inclined to engage in extra-role behaviors to assist the group.

While narcissists can contribute to greater group cohesion, this usually occurs in only a handful of circumstances. For instance, cohesion levels may be higher if narcissists are admired by the group. In this case, the narcissist is also more likely to identify with and like their group. On the other hand, if there is a rivalry between a narcissist and others in the group, narcissists may try to remove these rivals from the group or leave the group themselves. Another obstacle to group cohesion is the fact that narcissists often either are disliked by their peers or end up becoming unpopular. (After a while, people start to see through the bragging and shameless self-promotion.)

Despite these challenges, some strategies can prevent the potential adverse effects of narcissists on group functioning. Creating a strong sense of group cohesion can help make unacceptable behavior more noticeable. Peer pressure can help the narcissist adapt to the group's norms. One norm that can be developed is providing constructive peer feedback. A narcissist will likely respond better to this type of feedback since it would not be perceived as threatening if it came from a single person or leader. Although managing a narcissist can be challenging as they often fail to acknowledge any issues with their behavior, it is essential to ensure a group's cohesion and success.[110]

Groups generally form an informal status order based on ranking and command of needed resources.[106] Individuals can find themselves in conflicts when they move between groups whose status criteria are different or when they join groups whose members have heterogeneous backgrounds. Group cultures also differ in their criteria for conferring status upon individuals. When groups are heterogeneous, status differences may initiate conflict as the group attempts to reconcile the separate hierarchies.[107] As we will see in the next chapter, this can be a problem when management creates teams of employees from varied functions. Lastly, the threat of lost status can lead high-status group members to take desperate action. For instance, one study of senior politicians showed that those who were under threat of lost status were more likely to engage in large-scale corporate bribery.[108] Furthermore, the loss of high-status group members to higher-status competitors can also be detrimental to the group (although the group may actually benefit if the high-status group member leaves for a lower-status group).[109]

Group Property 4: Size and Dynamics

Does the size of a group affect the group's overall behavior? Yes, but the effect depends on the outcome of interest (e.g., performance, creativity).[111] Groups with a dozen or more members are good for gaining diverse input.[112] If the goal is fact-finding or idea-generating, then larger groups should be more effective.[113] Smaller groups of about seven members are better if the goal is performance and productivity[114] and for "transformational" leadership techniques to be most effect (see the chapter on leadership).[115] Group size also has implications for ethical decision making. For instance, we hold group size stereotypes associated with trustworthiness (e.g., smaller groups are more

trustworthy).[116] Also, we tend to feel less compassion and empathy toward (and are thus less likely to help) groups that are large in size.[117]

Group dynamics are also important for characterizing groups. One of the most important findings about the size of a group concerns **social loafing**, the tendency for individuals to expend less effort when working collectively than when alone.[118] Social loafing directly challenges the assumption that the productivity of the group as a whole should at least equal the sum of the productivity of the individuals in it, no matter the group size.

social loafing The tendency for individuals to expend less effort when working collectively than when working individually.

What causes social loafing? It may be a belief that others in the group are not carrying their fair share. Particularly, the group must believe the social loafer is acting in an exploitive manner (benefiting at the expense of other team members).[119] Another explanation for social loafing is diffusion of responsibility. Because group results cannot be attributed to any single person, the relationship between an individual's input and the group's output is clouded. Individuals may then be tempted to become free riders and coast on the group's efforts.[120] The implications for OB are significant. When managers use collective work situations, they must also be able to identify individual efforts. Greater performance diversity creates greater social loafing the longer a group is together, which decreases satisfaction and performance.[121]

The stronger an individual's work ethic, the less likely that person is to engage in social loafing.[122] Also, the greater the level of conscientiousness and agreeableness (see the chapter on personality and individual differences) in a group, the more likely that performance will remain high whether there is social loafing or not.[123] Virtual groups also may have issues with social loafing, especially if members are dissimilar and have a number of family responsibilities that detract their attention from group performance.[124] There are ways to prevent social loafing:

1. Set group goals so the group has a common purpose to strive toward.
2. Increase intergroup competition that focuses on the shared group outcome.
3. Engage in peer evaluations.
4. Select members who have high motivation and prefer to work in groups.
5. Base group rewards in part on each member's unique contributions and structure work so that each member's contribution can be identified.[125]



Young employees of Alibaba's Tmall online shopping site celebrate their group's achievement of increasing the volume of sales orders during China's "Singles Day" shopping event. Although social loafing is consistent with individualistic cultures, in collectivist societies such as China, employees are motivated by group goals and perform better in groups than they do when they are working individually.
Source: Han Chuanhao Xinhua News Agency/ Newscom

Group Property 5: Cohesion

9-6 Describe how cohesion is related to group effectiveness.

cohesion The shared bond driving group members to work together and stay in the group.

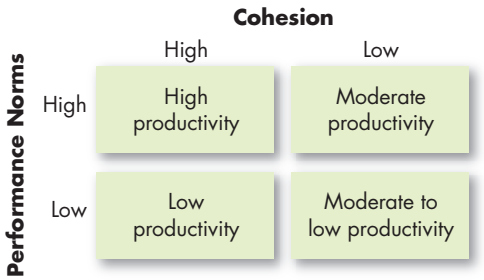
For a group to be highly functioning, it must act cohesively as a unit. Groups differ in their **cohesion**—the degree to which members hold a shared bond with one another and are motivated to stay in the group.[126] Some work groups are cohesive because the members have spent a great deal of time together, the group's small size or purpose facilitates high interaction, or external threats have brought members close together. Research suggests that the connections made in cohesive teams may even remain active after teams disband.[127]

Cohesion affects group productivity, and vice versa.[128] It can also lead individual group members to engage in OCBs and feel more confident in their jobs, and eventually, it can lead to growth in productivity over time.[129] However, the influence of cohesion may depend on other group characteristics. For instance, cohesion is more important in groups in which members' roles and responsibilities are highly dependent on one another (e.g., project teams).[130] Furthermore, studies consistently show that the relationship between cohesion and productivity depends on the group's performance-related norms.[131] If norms for quality, output, and cooperation with outsiders are high, a cohesive group will be productive. But if cohesion is high and performance norms are low, productivity will be low. Conversely, when cohesion is low and performance norms are high, productivity will be moderate (but not as high as it would be if the group were cohesive). Regardless, when cohesion and performance-related norms are both low, productivity tends to fall into the low-to-moderate range. These conclusions are summarized in Exhibit 9-4.

Beyond playing *Minecraft, Fortnite*, or other video games with your group,[132] what can you do to encourage group cohesiveness?

1. Make the group smaller.
2. Encourage agreement with group goals.
3. Increase the time members spend together.
4. Increase the group's status and the perceived difficulty of attaining membership.
5. Stimulate competition with other groups.
6. Give rewards to the group rather than to individual members.
7. Physically isolate the group.[133]

Exhibit 9-4 **Relationship Among Group Cohesion, Performance Norms, and Productivity**



Toward a Better World

Whirlpool: Building Cohesion Through Volunteering

Habitat for Humanity is a well-known nonprofit with the mission of providing affordable housing to people and families in need. Through donations, volunteering efforts, and partnerships, Habitat for Humanity can provide housing and affordable mortgages to families in need and has been doing so for decades. Whirlpool, a Fortune 500 manufacturer of home appliances, has a long-standing partnership with Habitat for Humanity. For more than twenty years, Whirlpool has helped build new homes in over forty-five countries. It has helped more than one hundred thousand families in the United States and Canada alone. Whirlpool has made a substantial commitment of its production and financial resources—committing over $100 million and donating nearly two hundred thousand appliances to homes worldwide.

Despite these substantial contributions, Whirlpool also derives a unique benefit from its employee volunteers contributing to these efforts. For more than twenty years, more than eight thousand employees across numerous departments and work groups have volunteered, donating on average anywhere between 250 and 500 hours per home. Whirlpool enables employees to participate in Habitat for Humanity both on a rolling basis (e.g., weekend projects) and as a part of large-scale, organized events, such as the Whirlpool Community Day and the Blitz Build (a collaboration with Indiana University Kelley School of Business).

As John O'Connor of the career services firm Career Pro Inc. notes, "Sometimes the best building of bonds and trust is outside the walls of the organization... Volunteer experiences where trust can be built often directly translate positively and immediately." Indeed, many executives, managers, and employees across organizations describe how volunteering helps bring them closer to others in their organizations and work groups. Conversely, many suggest that volunteering is often stigmatized when it is associated with being distracted from work and pulling one's attention away from their obligations. Regardless, does it help build cohesion and commitment like so many suggest?

The picture is much more nuanced than expected. One study of volunteering in Street Soccer USA suggests that volunteering does not necessarily develop cohesion among members of a work group. However, it can help develop greater cohesion among the people who participate in the effort. In other words, the volunteering group develops a sense of cohesion as its own group and in that context. The activity can also help reduce prejudice among the group members, especially if it is demographically diverse in composition. Furthermore, not all volunteers become involved for the same reasons, nor do they approach the activity with the same drives. Although people often assume that volunteers are all service-oriented and striving to fulfill the same needs, research suggests that volunteers differ in their commitment to volunteering. Some see themselves as administrators and managers of the effort, neglecting to get their "hands dirty" with the activity. In contrast, others are dedicated to the activity and become deeply involved in the effort and committed to their work groups and organizations. Still, others are less reliable episodic volunteers who are not as invested in the activity. Differences in these motivations do not necessarily beget cohesion in work groups that volunteer and potentially cause conflict. Regardless, a more straightforward answer to the question suggests that volunteering can be a powerful tool to increase cohesion—if the conditions, support, and motivations are right.[134]

Group Decision Making

9-7 Contrast the strengths and weaknesses of group decision making.

The belief—characterized by juries—that two heads are better than one has long been accepted as a basic component of the U.S. legal system and those of many other countries. Many decisions in organizations are made by groups, teams, or committees (or multiple groups, teams, or committees).[135] We will discuss the advantages of group decision making, along with the unique challenges that group dynamics bring to the decision-making process. Finally, we will offer some techniques for maximizing the group decision-making opportunity.

Groups Versus the Individual

Decision-making groups may be widely used in organizations, but are group decisions preferable to those made by an individual alone? The answer depends on several factors. Let us begin by looking at the strengths, weaknesses, and efficacy of group decision making.

Strengths of Group Decision Making Groups generate *more complete information and knowledge*. By aggregating the resources of several individuals, groups bring more input as well as heterogeneity into the decision process (as long as this information is reliable).[136] They offer *increased diversity of views*. This opens the opportunity to consider more approaches and alternatives.[137] Finally, groups lead to increased *acceptance of a solution*. During decision making, members are more likely to be accepting when dissenting opinions are framed as debates rather than disagreements.[138] Group members who participate in decisions are more likely to enthusiastically support and encourage others to accept them once the decision has been made.

Weaknesses of Group Decision Making Group decisions are time-consuming because groups typically take more time to reach a solution, especially for virtual groups.[139] There are *conformity pressures*. The desire by group members to be accepted and considered an asset to the group can squash any overt disagreement and cause group members to settle for less.[140] Group discussion can be *dominated by one or a few members*. If they are low- and medium-ability members or if the information they provide is unreliable, the group's overall effectiveness will suffer.[141] Interestingly, in virtual contexts, this may be addressed by allowing minority members to have secret conversations and lead to improved decision quality.[142] Also, setting a norm that allows "lone dissenters," or group members who have divergent opinions, can reduce conformity and the influence of dominating members.[143] Finally, group decisions suffer from *ambiguous responsibility*. In an individual decision, it is clear who is accountable for the outcome. In a group decision, the responsibility of any single member is diluted.

Effectiveness and Efficiency Whether groups are more effective than individuals depends on how you define effectiveness and who is making the evaluation. As discussed in the chapter on perception and individual decision-making, the accuracy of evaluators can be affected by general perceptions of group cohesion and trust.[144] Group decisions are generally more *accurate* than the decisions of the average individual in a group, but they are less accurate than the judgments of the most accurate person.[145] In terms of *speed*, individuals are superior. If *creativity* is important, groups tend to be more effective. And if effectiveness means the degree of *acceptance* of achievable solutions, the nod again goes to the group.[146]

We cannot consider effectiveness without also assessing efficiency. With few exceptions, group decision making consumes more work hours than having an individual tackle the same problem. The exceptions tend to be instances in which, to achieve comparable quantities of diverse input, the single decision maker must spend a great deal of time reviewing files and talking to other people who have unique information that could lead to a better solution.[147] Research suggests that groups may be inefficient in decision making if information is heavily dispersed among group members and effectively "hidden." It is very difficult to compile this information to make the best decision, and groups in these situations are encouraged to openly and collaboratively share information to solve the problem.[148] In deciding whether to use groups, then, managers must assess whether increases in effectiveness are more than enough to offset the reductions in efficiency.

In summary, groups are an excellent vehicle for performing many steps in the decision-making process and offer both breadth and depth of input for

information gathering. These pluses, however, may be more than offset by the time consumed by group decisions, the internal conflicts they may create, and the pressures they generate toward conformity. In some cases, therefore, we can expect individuals to make better decisions than groups. It is also important to note that groups can also benefit from decision-making support, assistance, and guidelines. For instance, providing in-process support and assistance can help offset some of the limitations of group decision making and may lead groups to discuss member preferences less, pool more critical information, and spend more time in discussion (than if they did not receive any support).[149]

Groupthink and Groupshift

Two by-products of group decision making, groupthink and groupshift, can affect a group's ability to appraise alternatives objectively and achieve high-quality solutions.

Groupthink **Groupthink** describes situations in which group pressures for conformity deter the group from critically appraising unusual, minority, or unpopular views. Groupthink negatively impacts many groups and can dramatically hinder their performance.[150] Groupthink appears closely aligned with the conclusions Solomon Asch drew in his experiments with a lone dissenter. Individuals who hold a position different from that of the dominant majority are under pressure to suppress, withhold, or modify their true feelings and beliefs. Similarly, the *Abilene Paradox* results when a group makes a collective decision that is counter to what the individual members actually desire or think is the best course of action. As an example, people often sign petitions as a part of a group because they fear how others in their group will evaluate them for not signing them (despite disagreeing with what is in the petitions).[151]

groupthink A phenomenon in which the norm for consensus overrides the realistic appraisal of alternative courses of action.

Groups that are more focused on performance than learning are especially likely to fall victim to groupthink and to suppress the opinions of those who do not agree with the majority.[152] Groupthink seems to occur most often early in the group's tenure, when there is a clear group identity, when members hold a positive image of their group they want to protect, and when the group perceives a collective threat to its positive image.[153]

What can managers do to minimize groupthink?[154] First, they can monitor group size. People grow more intimidated and hesitant as group size increases. Managers should also encourage group leaders to play an impartial role. Leaders should actively seek input from all members, especially in the early stages of deliberation. In addition, managers should appoint one group member to play the role of devil's advocate, overtly challenging the majority position and offering divergent perspectives. Yet another suggestion is to use exercises that stimulate active discussion of diverse alternatives without threatening the group or intensifying identity protection. Have group members delay discussion of possible gains so they can first talk about the dangers or risks inherent in a decision. Requiring members to focus initially on the negatives of an alternative makes the group less likely to stifle dissenting views and more likely to gain an objective evaluation.

Groupshift **Groupshift**, or group polarization, describes the way group members tend to exaggerate their initial positions when discussing a given set of alternatives to arrive at a solution. We can view this group polarization as a special case of groupthink. The group's decision reflects the dominant decision-making norm—toward greater caution or more risk—that develops during discussion.[155] In groups, discussion leads members toward a more extreme view of the position they already held.[156]

groupshift A change between a group's decision and an individual decision that a member within the group would make; the shift can be toward either conservatism or greater risk, but it generally is toward a more extreme version of the group's original position.

The shift toward polarization has several explanations.[157] It has been argued, for instance, that discussion is persuasive and makes the members more comfortable with each other and thus more willing to express extreme versions of their original positions. Another argument is that the group diffuses responsibility. Group decisions free any single member from accountability for the group's final choice, so a more extreme position can be taken. It is also likely that people take extreme positions because they want to demonstrate how different they are from the outgroup.[158]

So how should you use the findings on groupshift? Recognize that group decisions exaggerate the initial position of individual members, the shift has been shown more often to be toward greater risk, and which way a group will shift is a function of the members' prediscussion inclinations. We now turn to the techniques by which groups make decisions. These reduce some of the dysfunctional aspects of group decision making.

Group Decision-Making Techniques

interacting groups Typical groups in which members interact with each other, relying on both verbal and nonverbal communication.

The most common form of group decision making takes place in **interacting groups**.[159] Members rely on both verbal and nonverbal interaction to communicate. But as our discussion of groupthink demonstrated, interacting groups often censor themselves and pressure individual members toward conformity of opinion. Brainstorming and the nominal group technique can reduce problems inherent in the traditional interacting group.

brainstorming An idea-generation process that specifically encourages any and all alternatives while withholding any criticism of those alternatives.

Brainstorming

Brainstorming can overcome the pressures for conformity that dampen creativity[160] by encouraging any and all alternatives while withholding criticism. In a typical brainstorming session, the group leader states the problem in a clear manner so all group members understand. Members then freewheel as many alternatives as they can in a given length of time. To encourage members to "think the unusual," no criticism is allowed, even of the most bizarre suggestions, and all ideas are recorded for later discussion and analysis.

Brainstorming may indeed generate ideas—but not very efficiently. Research consistently shows individuals working alone generate more ideas than a group in a brainstorming session. One reason for this is "production blocking." When people are generating ideas in a group, many are talking at once, which blocks individuals' thought process and eventually impedes the sharing of ideas.[161]

nominal group technique A group decision-making method in which members meet to pool their judgments in a systematic but independent fashion.

Nominal Group Technique

The **nominal group technique** may be more effective. This technique restricts discussion and interpersonal communication during the decision-making process. Group members are all physically present, as in a traditional meeting, but they operate independently. Specifically, a problem is presented, and then the group takes the following steps:

1. **Before any discussion takes place**, each member independently records ideas about the problem.
2. **Afterward**, each member presents one idea to the group. No discussion takes place until all ideas have been presented and recorded.
3. **The group discusses the ideas** for clarity and evaluates them.
4. **Each group member silently and independently rank-orders** the ideas. The idea with the highest aggregate ranking determines the final decision.

The chief advantage of the nominal group technique is that it permits a group to meet formally but does not restrict independent thinking. Research generally shows that nominal groups outperform brainstorming groups.[162]

Exhibit 9-5 Evaluating Group Effectiveness

	Type of Group		
Effectiveness Criteria	**Interacting**	**Brainstorming**	**Nominal**
Number and quality of ideas	Low	Moderate	High
Social pressure	High	Low	Moderate
Money costs	Low	Low	Low
Speed	Moderate	Moderate	Moderate
Task orientation	Low	High	High
Potential for interpersonal conflict	High	Low	Moderate
Commitment to solution	High	Not applicable	Moderate
Development of group cohesiveness	High	High	Moderate

Each of the group decision techniques has its own set of strengths and weaknesses. The choice depends on the criteria you want to emphasize and the cost–benefit trade-off. As Exhibit 9-5 indicates, an interacting group is good for achieving commitment to a solution, brainstorming develops group cohesiveness, and the nominal group technique is an efficient means for generating many ideas.

Summary

This chapter laid the groundwork for discussions of groups and teams in organizations, both formal and informal. In defining the nature of groups in organizations, we first discussed social identity as a foundational theory describing how people identify with and behave as members of a group. Next, we described how groups form and dissolve over time. For the remainder of the chapter, we described several groups' properties that impact how groups and teams operate in organizational contexts. First, differences in role perceptions and expectations can often result in conflict, such as how employees' psychological contracts may be violated, resulting in adverse outcomes. Second, group norms can significantly influence group functioning, altering group emotions, behaviors, and outcomes. Third, group member status can affect the power and influence between people and the capability of directing the course of action for the group. Fourth, the group's size matters, depending upon the group outcome of interest—groups can either be too large or too small, increasing the potential for social loafing in some cases. Fifth, and finally, cohesion is an essential characteristic of groups that has significant implications for a group's ability to coordinate, work effectively together, and stay together. At the end of the chapter, we described how some decisions are made within groups, pitfalls and traps groups fall into (e.g., groupthink and groupshift), and strategies for improving the quality of group decisions.

Implications for Managers

- How can you expect group members to contribute toward or act as a part of the group if they do not identify with the group? Managers would do well to promote group members' identification and manage identity threats while at the same time avoiding biased ingroup favoritism.

- When forming new work groups, try to consider and anticipate the "group life cycle" and the phases groups move through. Groups rarely are immediately effective without careful placement, training, and onboarding. Recognizing the current stage of any given group can help managers provide the support and assistance they need to aid the group and address any problems that arise.
- Role clarity through aligned role expectations and perceptions is essential for group members to understand what is expected of them.
- Managers should establish clear psychological contracts within groups, fulfill their part of the contract, and rebuild trust when it is broken.
- When experiencing role conflict, try to be creative in how you approach it. Often when you are able to adapt there are creative solutions that enable both roles to be fulfilled. Also, for employees experiencing role conflict, management support and resources can help balance competing demands.
- Norms can have a powerful influence on behavior in organizations, and sometimes we are not even aware of them (or that they are directing behavior). Try to keep a pulse on norms in your work group (and the example you are setting).
- Managers should be mindful of status differences in their work groups. They should establish checks and balances so leaders do not justify unethical behavior or unethically try to maintain their status. They should actively encourage lower-status members to contribute and provide a psychologically safe environment for them to voice their ideas, thoughts, and concerns.
- Design work groups of the appropriate size for the group's function to avoid social loafing.
- Consider building your work group's cohesion to reduce turnover and increase the group's effectiveness.
- Some decisions are better left to individuals. But if the group must make the decision collaboratively, the group should strive to avoid groupthink and groupshift, encourage open communication among members, and take on a structured approach to fulfill its purpose (e.g., nominal group technique).

Conformity Is Counterproductive and Should Be Avoided

POINT

While individuals may have good intentions when trying to conform or fit in, this inauthenticity can negatively impact psychological and emotional well-being. Although conformity can be unintentional, with many unknowingly falling in line with the rest of the group, it can also be an intentional process that should be avoided. Conformity strips people of their autonomy and authenticity. When employees can be their authentic selves, there are multiple benefits, including lower stress levels and increased overall well-being.

In more extreme cases, conformity can even lead to serious unethical behavior and group division. For instance, social media has created conformity dynamics that make it extremely easy for people to band together under common interests. These groups divide the world into ingroups and outgroups and criticize others who think differently as evil or reprehensible. Conformity may be highly responsible for this polarization. People look to trusted members of ingroups for how to feel or act, signal to other members they "belong" to the group, echo important group members' beliefs or positions, and perpetuate the spread of problematic information through the network in a social cascade. For example, during the COVID-19 pandemic, these cascades led to the retweeting and reposting of inaccurate information by thousands of people (e.g., viral inaccurate memes about the virus).

As Adam Grant describes in his book *Originals: How Non-Conformists Move the World*, individuals who think for themselves and do not go along with ideas just because they are popular can be some of the best innovators. Organizations need more "shapers," or what Grant calls the independent and curious thinkers. Because they are not consumed by a fear of failing and do not hesitate to break norms, they can also influence others to be more original. Although deviating from the group is often no easy task, ultimately, it can lead individuals to be more innovative, productive, and satisfied at work.

COUNTERPOINT

There is a time and place for conformity, particularly when it can help support an organization's larger goals. Research has shown that peer pressure can be very effective at motivating individuals to conform to certain norms. In one study on improving hand hygiene in hospitals, an intervention that utilized peer pressure was more effective than a monetary incentive in improving hand hygiene. In this case, doctors were pressured to conform to the desired norm of hand hygiene through strategies like appreciation notes, celebratory emails, and firm reminders of the importance of cooperating to achieve a collective goal. In this case, conformity was key to the health and safety of patients.

Furthermore, conformists may be crucial to innovation in organizations. Although teams with creative individuals can develop excellent ideas, many innovative ideas may never be executed. If members of the group dislike rules and are prone to conflict, they may reject the ideas and refuse to implement them. However, when there is a balance within the team, including both nonconformists and conformists, there is greater group cohesion, facilitating creative ideas that will benefit the organization. Thus, although conformists may not be as helpful in generating innovative ideas, they can dramatically increase a group's ability to innovate. As such, conformity is hardly counterproductive.[163]

CHAPTER REVIEW

QUESTIONS FOR REVIEW

9-1 What are the different types of groups?

9-2 What are the key components of the punctuated-equilibrium model?

9-3 How do role requirements change in different situations?

9-4 How do group norms influence an individual's behavior?

9-5 How do status and size differences affect group performance?

9-6 How can cohesion support group effectiveness?

9-7 What are the strengths and weaknesses of group (versus individual) decision making?

APPLICATION AND EMPLOYABILITY

Groups have a powerful influence on individuals, and group characteristics impact their decision making, innovation, performance, and even unethical behavior. Norms may be beneficial when they guide group members toward appropriate behavior and prompt them to engage in prosocial behaviors. Yet groups may also exert influences that may be harmful, encourage conformity, and lead to poor decision making. By gaining an understanding of group behaviors, you can better understand how to leverage group processes in the workplace in your interactions with your coworkers, supervisors, and subordinates. Armed with this knowledge, you can recognize and avoid counterproductive processes that stem from conflicting role expectations, counterproductive norms, status and size dynamics, factors that prevent group cohesion, and common traps in group decision making. In this chapter, you learned valuable lessons about critical thinking, creativity, and collaboration when listening to gossip about other group members, managing narcissistic group members, critically evaluating the function of conformity in work groups, and reflecting on whether volunteering improves group cohesion. In the next section, you will continue to develop these skills as well as your communication and self-management skills to surviving the wild alone and in a group, considering how you should respond to a supervisor's unethical behavior, and exploring how a group divided affected a military campaign.

EXPERIENTIAL EXERCISE Surviving the Wild: Join a Group or Go It Alone?

You are a member of a hiking party. After reaching base camp on the first day, you decide to take a quick sunset hike by yourself. After a few exhilarating miles, you turn around for the return to camp. On your way back, you realize you are lost. You shout for help to no avail. It is now dark—and getting cold.

Your Task

Without communicating with anyone else in your group, read the following scenarios and choose the best answer. Keep track of your answers on a sheet of paper. You have ten minutes to answer the ten questions.

Questions

9-8. The first thing you decide to do is to build a fire. However, you have no matches, so you use the bow-and-drill method. What is the bow-and-drill method?

a. A dry, soft stick is rubbed between the hands against a board of supple green wood.
b. A soft, green stick is rubbed between the hands against a hardwood board.
c. A straight stick of wood is quickly rubbed back and forth against a dead tree.
d. Two sticks (one being the bow, the other the drill) are struck to create a spark.

9-9. It occurs to you that you can also use the fire as a distress signal. How do you form the international distress signal with fire?

a. Fires in random order
b. Fires in a square
c. Fires in a cross
d. Fires in a line

9-10. You are very thirsty. You go to a nearby stream and collect some water in the small metal cup you have in your backpack. How long should you boil the water?
a. 15 minutes
b. A few seconds
c. 1 minute
d. It depends on the altitude.

9-11. You are very hungry, so you decide to eat what appear to be edible berries. When performing the universal edibility test, what should you do?
a. Do not eat for two hours before the test.
b. If the plant stings your lip, confirm the sting by holding it under your tongue for fifteen minutes.
c. If nothing bad has happened two hours after digestion, eat half a cup of the plant and wait again.
d. Separate the plant into its basic components and eat each component, one at a time.

9-12. Next, you decide to build a shelter for the evening. In selecting a site, what do you *not* have to consider?
a. It must contain material to make the type of shelter you need.
b. It must be free of insects, reptiles, and poisonous plants.
c. It must be large enough and level enough for you to lie down comfortably.
d. It must be on a hill so you can signal rescuers and keep an eye on your surroundings.

9-13. In the shelter, you notice a spider. You heard from a fellow hiker that black widow spiders populate the area. How do you identify a black widow spider?
a. Its head and abdomen are black; its thorax is red.
b. It is attracted to light.
c. It runs away from light.
d. It is dark with a red or orange marking on the female's abdomen.

9-14. After getting some sleep, you notice that the night sky has cleared, so you decide to try to find your way back to base camp. You believe you can use the North Star for navigation. How do you locate the North Star?
a. Hold your right hand up as far as you can and look between your index and middle fingers.
b. Find Sirius and look 60 degrees above it and to the right.
c. Look for the Big Dipper and follow the line created by its cup end.
d. Follow the line of Orion's belt.

9-15. You come across a fast-moving stream. What is the best way to cross it?
a. Find a spot downstream from a sandbar, where the water will be calmer.
b. Build a bridge.
c. Find a rocky area because the water will be shallow and you will have hand- and footholds.
d. Find a level stretch where it breaks into a few channels.

9-16. After walking for about an hour, you feel several spiders in your clothes. You don't feel any pain, but you know some spider bites are painless. Which of these spider bites is painless?
a. Black widow
b. Brown recluse
c. Wolf spider
d. Harvestman (daddy longlegs)

9-17. You decide to eat some insects. Which insects should you avoid?
a. Adults that sting or bite
b. Caterpillars and insects that have a pungent odor
c. Hairy or brightly colored ones
d. All of the above

Group Task

Next, break into groups of five or six people. Once the group comes to an agreement for what to do in each situation, write your decision on the same sheet of paper you used for your individual answers.

Scoring Your Answers

Your instructor will provide you with the correct answers, which are based on expert judgments in these situations. Once you have received the answers, calculate (A) your individual score, (B) your group's score, (C) the average individual score in the group, and (D) the best individual score in the group. Write these down and consult with your group to ensure that they are accurate.
a. Your individual score
b. Your group's score
c. Average individual score in group
d. Best individual score in group

Discussion Questions

9-18. How did your group (B) perform relative to yourself (A)?

9-19. How did your group (B) perform relative to the average individual score in the group (C)?

9-20. How did your group (B) perform relative to the best individual score in the group (D)?

9-21. Compare your results with those of other groups. Did some groups do a better job of outperforming individuals than others?

9-22. What do these results tell you about the effectiveness of group decision making?

9-23. What can groups do to make group decision making more effective?

9-24. What circumstances might cause a group to perform worse than its best individual?

ETHICAL DILEMMA Follow the Leader?

You are at dinner with your work group. You have been looking forward to spending time with your coworkers outside the office all week. However, when you arrive, your supervisor (Devon) is not pleased with the table and demands that they switch your group to a different one. When the server tells your supervisor it is impossible, the supervisor requests to speak with the restaurant manager, who asserts that there are simply no other tables available.

While the rest of the group tries to move on, the supervisor continues to make comments, complaining, "Is anyone else upset about this view? Why is there all of this loud construction happening?" Once again, the server tries to explain, but the supervisor interrupts, "You really need to work on your customer service." Then when the server walks away, someone from your team makes a joke about the server's competence. The supervisor seems to approve and makes another derogatory remark about the server. To your disgust, everyone in the group laughs but you.

While your supervisor is engaged in a conversation with someone else, you whisper to a coworker seated next to you that you think you should say something. "Are you kidding me?" your coworker says in a low voice. "I mean, this isn't the first time something like this has happened with Devon, so what did you expect?" Your coworker sighs and adds, "Well, do it at your own risk."[164]

Discussion Questions

9-25. If you were a member of this group, would you communicate to the supervisor that you do not approve of their language and behavior? Or would you stay silent? Explain.

9-26. What role do you believe norms play in this situation? What norms could be operating in this situation and from what source (e.g., the group, the restaurant, customer interactions)?

9-27. Why do you think no one else in the group stepped up and confronted the supervisor about their behavior? What forces could have been at play?

9-28. In your opinion, what would have been the worst way to respond to this situation? What would have been the best way to respond to the situation? Explain.

CASE INCIDENT Cultural Context and Group Dynamics

The use of collaborative group working and teamwork has been a consistent trend in most global companies. The processes, norms, and dynamics of group work have been intensively studied by many Western social psychologists and management scholars. However, as we increasingly live and work in a global world, the big question is, do the same principles of group dynamics apply across cultures? The answer to the question has implications on how we work in cross-cultural teams and how we manage group work across different countries.

We know from research that national contexts play a major role in shaping an individual's social attitudes, values, behaviors, and sensemaking process, all of which matter when it comes to working in a group and can, in turn, shape group processes. Research can also give us some insight into how group norms and roles as well as the processes of group influence may vary across cultures. For example, studies of groups and teams in East-Asian countries like China and South Korea suggest that specific cultural characteristics, such as the prevalence of collectivist values, can provide important foundations for working in groups by reducing negative dynamics like social loafing. On the other hand, some aspects of many East-Asian cultures, such as strong social hierarchies and high power distance (the tendency to exhibit great deference to someone with authority), may impede decision-making processes, as group members may feel less empowered to voice opinions different to those of the group leader. Thinking about how work groups operate across cultures allows us to think critically about the premises of a theory, to refine it, and to understand its limits.

For the practice of managing in the global context, it is vital for leaders to be sensitive and aware that different group processes may work slightly differently in different national contexts. Yet they also need to keep in mind that people are not completely programmed by their culture and may indeed be very adaptable to new kinds of tasks and working formats. Cultural influence on group dynamics

poses interesting questions for leaders, such as whether practices should be adapted to the specific ways in which groups may operate in certain cultural contexts, or alternatively, whether a particular way of teamworking that leaders are used to should be imposed on teams regardless of cultural context.

The answer may be more complex than a simple binary. While cultural differences in a team may be disruptive, they can also be synergistic and offer advantages. Recent studies suggest that thinking about differences in culture as a resource rather than a problem may help managers analyze and leverage them to increase productivity. Leaders need to have good knowledge of the central aspects of the local culture that would help them make informed decisions on whether to minimize or to adopt some or all cultural differences, leveraging them to achieve better team dynamics or performance as well as make decisions on how these outcomes may be accomplished. This would mean creating a somewhat hybrid culture, a mix or blend of different cultural aspects present in the workplace, one that is not necessarily predetermined but emerges from interactions, resulting in the development of new guidelines and objectives in relation to work, roles, and communication among the culturally diverse team.

To achieve this, we need to identify and encourage the kinds of cultural differences that allow teams to be more productive and creative. At the same time, it is important to recognize differences that can be disruptive. While these differences can still be respected, group leaders can set ground rules and clarify processes and procedures within groups to help prevent conflict and friction. Such a "hybrid culture" approach acknowledges that cultural context certainly does impact group dynamics but takes a balanced attitude to managing differences, rather than simply adopting or discarding all of them.[165]

Questions

9-29. Think about your own experience of working in a group. How do you think your cultural background impacts your experience of working in a group?

9-30. Is working in and managing a monocultural group problem-free?

9-31. Imagine you are a manager tasked with supervising work groups in a context different to your home country. You are very new to the context and do not know much about it. What can help you to understand how to build group cohesion?

10 Understanding Work Teams



Source: Pongmanat Tasiri/EPA-EFE/Shutterstock

LEARNING OBJECTIVES

After studying this chapter, you should be able to:

10-1 Contrast groups and teams.

10-2 Contrast the five types of team arrangements.

10-3 Identify the characteristics of effective teams.

10-4 Explain how organizations can create effective teams.

10-5 Decide when to use individuals instead of teams.

Employability Skills Matrix (ESM)

	Myth or Science?	An Ethical Choice	Point/ Counterpoint	Toward a Better World	Experiential Exercise	Ethical Dilemma	Case Incident
Critical Thinking & Creativity	✓	✓	✓	✓	✓	✓	✓
Communication	✓	✓			✓	✓	
Collaboration	✓	✓	✓	✓	✓	✓	✓
Self-Management	✓				✓	✓	✓
Social Responsibility		✓		✓			
Leadership	✓	✓	✓	✓	✓		✓
Career Management				✓		✓	

RESILIENT TEAMS

In 2018, twelve boys and their soccer coach were trapped deep within a maze of caves in Thailand. The team had planned to explore the caves for no more than an hour, but flash floods took them by surprise and forced them to travel even deeper into the caves. They would not emerge for another two weeks. It was a dire situation as the summer rainy season would soon begin. After the boys' bikes, bags, and football shoes were found outside the Tham Luang cave, a rescue team was quickly put together. The rescue team had to decide whether they should try a risky rescue attempt or leave the boys where they were for a few months, delivering food when possible.

The rescue team relied on their collective expertise to develop as many solutions as possible. It was important in this situation that team members felt their ideas would be taken seriously no matter how unconventional. In a unique situation like this, input was needed from all team members. They considered options like drilling down through the caves to establish proof of life, using an industrial pump system to lower the water levels in the caves, and finally diving down to rescue the boys and their coach. Ultimately the rescue team realized they would have to choose a solution quickly—they soon decided to assemble a dive team to reach the trapped teens. The boys had to be heavily sedated as there was no way the boys who had never dived before could make it through the flooded tunnels.

The multinational team that was able to execute the soccer team's incredible rescue overcame extreme conditions and the loss of a former Thai

Navy SEAL in the process. Studies indicate that team members frequently only discuss ideas that are commonly known rather than unique ideas out of concern that they will be rejected for suggesting different information. However, this team's ability to not fall into this common trap is what made them successful. Their creative and novel plan would not have been possible without a team culture that encouraged and even required creative idea generation along with the psychological safety to ensure members felt like they could speak up when they had an idea. The team was open to myriad ideas and was able to effectively collaborate to refine and execute the plan.

The soccer team was also an effective team in its own way. Determined to survive, they used rocks to dig and create a cavern where they could huddle together to stay warm. The coach, a former monk, taught them meditation techniques to stay calm, use as little air as possible, and limit their movement to conserve their strength. In the end, all twelve boys and their coach were successfully rescued.[1]

SoaPen, which received a $50,000 grant from Toyota and numerous awards from organizations like UNICEF, is the product of teamwork and the entrepreneurial spirit.[2] The founders (Amanat Anand, Shubham Issar, and Maria Putri), a diverse women entrepreneurial team, designed the product (soap in the form of a thick colored pen that children can draw with) to make hand hygiene more accessible to children. Building their team was incredibly important, and Shubham notes that discovering people with complimentary expertise and different perspectives was critical to their success as a startup.[3]

Teams can sometimes achieve feats an individual could never accomplish.[4] Teams are more flexible and responsive to changing events than traditional departments or other forms of permanent groupings. They can quickly assemble, deploy, refocus, and disband. And, finally, research indicates that our involvement in teams positively shapes the way we think as individuals, introducing a collaborative mindset about even our personal decision making.[5]

The fact that organizations have embraced teamwork does not necessarily mean teams are always effective. Team members, as humans, can be swayed by errors in decision-making processes and dynamics (see, for example, the previous chapter on the foundations of group behavior) that can lead them astray from the best decisions. What conditions affect their potential? How do members work together? To answer these questions, let us first distinguish between groups and teams.

Differences Between Groups and Teams

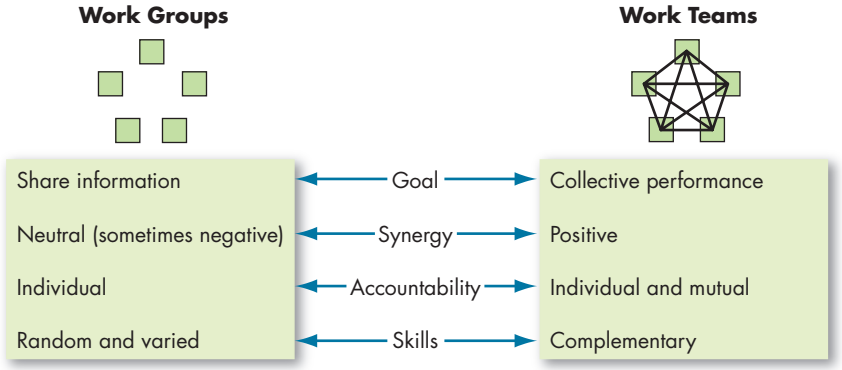
10-1 Contrast groups and teams.

work group A group that interacts primarily to share information and make decisions to help each group member perform within their respective area of responsibility.

According to some scholars, groups and teams are not the same thing (although functionally, the terms are often used to refer to the same thing).[6] In the previous chapter (foundations of group behavior), we defined a *group* as two or more individuals, interacting and interdependent, who come together to achieve particular objectives. A **work group** interacts primarily to share information and make decisions to help each member perform within their respective area of responsibility.

Work groups have no need or opportunity to engage in collective work with joint effort, so the group's performance is merely the summation of each member's individual contribution. There is no positive synergy that would create an overall level

Exhibit 10-1 Comparing Work Groups and Work Teams



of performance greater than the sum of the inputs. A work group is a collection of individuals doing their work, albeit with some interaction and/or dependency.

A **work team**, on the other hand, generates positive synergy through coordination.[7] The individual efforts result in a level of performance greater than the sum of the individual inputs. Teams are more likely to be constantly changing and adapting rather than static entities—seeing teams as dynamic systems in this way has led many to focus more on *teaming* as a verb (e.g., on the processes or actions involved in engaging as a team) rather than on the team itself.[8]

work team A group whose individual efforts result in performance that is greater than the sum of the individual inputs.

In both work groups and work teams, there are often behavioral expectations of members, collective normalization efforts, active group dynamics, and some level of decision making (even if only informally). Both may generate ideas, pool resources, or coordinate logistics such as work schedules; for the work group, however, this effort is limited to information gathering for decision makers outside the group. Whereas we can think of a work team as a subset of a work group, the team is constructed to be purposeful (symbiotic) in its member interaction. Exhibit 10-1 highlights the differences between them.

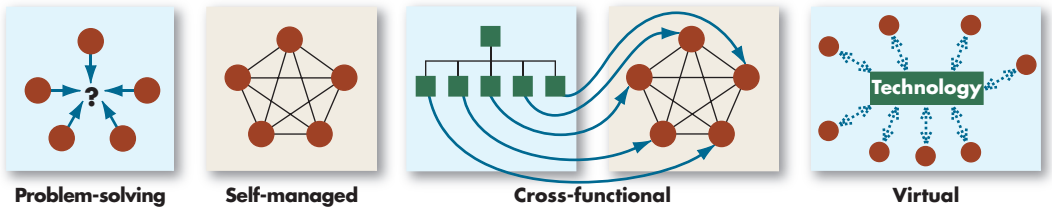
The definitions help clarify why organizations structure work processes in the way they do. The extensive use of teams creates the *potential* for an organization to generate greater outputs with no increase in employee head count. Notice, however, that we said *potential*. There is nothing magical that ensures the achievement of positive synergy in the creation of teams. Merely calling a *group* a *team* does not automatically improve its performance. As we show later, effective teams have certain common characteristics. If management hopes to gain increases in organizational performance through teams, these teams should possess these characteristics.

Types of Teams

10-2 Contrast the five types of team arrangements.

Teams can do a number of things, such as make products, provide services, negotiate deals, coordinate projects, offer advice, and make decisions.[9] In this section, we first describe four common types of teams in organizations: *problem-solving teams, self-managed work teams, cross-functional teams*, and *virtual teams* (see Exhibit 10-2). Then we will discuss *multiteam systems*, which take a broader perspective, suggesting that a "team of teams" interacts within and across organizations. Interest in multiteam systems is becoming increasingly widespread as work increases in complexity.

Exhibit 10-2 Four Types of Teams



Problem-Solving Teams

problem-solving team A team of employees from the same department who meet for a few hours each week to discuss ways of improving quality, efficiency, and the work environment.

Problem-solving teams such as quality-control teams have been in use for many years. Originally seen most often in manufacturing plants, these were permanent teams that generally met at a regular time, sometimes weekly or daily, to address quality standards and any problems with the products made. For example, direct-to-consumer watchmaker Vincero employs a full-time quality-control team that hand-checks every manufactured watch the company produces.[10] Also, the use of problem-solving teams has expanded into other arenas such as the medical field, where they are used to improve patient care services. Problem-solving teams like these rarely have the authority to implement their suggestions unilaterally, but if their recommendations are paired with implementation processes, some significant improvements can be realized.

Self-Managed Work Teams

As we discussed, problem-solving teams only make recommendations. Some organizations have gone further and created teams that also implement solutions and take responsibility for outcomes. For example, self-managed teams are used in the thirteen practices of the O'Brien Veterinary Group in Chicago, where they autonomously decide how to solve problems that arise and share what they have learned from their experiences with the other work teams.[11]

self-managed work team A team of employees who autonomously implement solutions and take responsibility for the outcomes of the solutions (responsibilities normally adopted by supervisors).

Self-managed work teams are composed of employees who perform highly related or interdependent jobs and who take on some supervisory responsibilities.[12] Typically, the responsibilities include planning and scheduling work, assigning tasks to members, making operating decisions, taking action to solve problems, and working with suppliers and customers. Fully self-managed work teams even select their own members who evaluate each other's performance.

When these teams are established, former supervisory positions take on decreased importance and are sometimes eliminated. However, with a lack of authority and accountability, teams may spend valuable time and resources aligning team member values and goals to "get on the same page".[13] As the founder of the O'Brien Veterinary Group notes, it is often difficult for managers to give up this kind of control: "It requires building a team of adults who want to handle problems and staying the course when things go sideways. The temptation to grab control back is big."[14]

Research findings on the effectiveness of self-managed work teams have not been uniformly positive. Some research indicates that the effectiveness of self-managed teams is contingent on the degree to which team-promoting behaviors are rewarded. For example, when team members perceive that economic rewards such as pay are dependent on input from their teammates, performance improves for both the team members and the team.[15]

A second area of research has been the impact of conflict on self-managed work team effectiveness. Some research indicates that self-managed teams are not effective when there is conflict. When disputes arise, members often stop cooperating and power struggles ensue, leading to lower group performance.[16]

However, other research indicates that when members feel confident they can speak up without being embarrassed, rejected, or punished by other team members—in other words, when they feel psychologically safe—conflict can be beneficial and boost team performance.[17]

Thirdly, research has also explored the effect of self-managed work teams on member behavior. Here again the findings are mixed. Although individuals on teams report higher levels of job satisfaction than other individuals, studies indicate they sometimes have higher absenteeism and turnover rates. Furthermore, one large-scale study of labor productivity found that no evidence supported the claim that self-managed teams performed better than traditional teams with less decision-making authority.[18] Finally, some research suggests that in the absence of controlled supervision, leaders may "over-emerge"; in other words, people who are not very effective as leaders can take control more readily.[19]

Cross-Functional Teams

Tech companies like ExtraHop and Ixia have been working to implement teams that bring employees from information technology (IT) and security operations (SecOps) to work together. As a result, they can meet cybersecurity objectives and, in so doing, consolidate their tool sets, break down silos, and formalize and automate their collaboration.[20] These examples illustrate the use of **cross-functional teams**, teams made up of employees from about the same hierarchical level but from different work areas who come together to accomplish a task. Organizations have used cross-functional teams for decades, and we would be hard-pressed to find a large organization or product launch that did not use them.

cross-functional team A team of employees from about the same hierarchical level but from different work areas who come together to accomplish a task.

Cross-functional teams can occasionally be an effective means of allowing people from diverse areas within or even between organizations to exchange information, develop new ideas, solve problems, and coordinate complex projects. However, due to the high need for coordination, cross-functional teams are not simple to form and manage. Why? First, different expertise is needed because the members are at roughly the same level in the organization, which creates leadership ambiguity. A climate of trust thus needs to be developed before leadership emergence (see the chapter on leadership) can happen without undue conflict.[21] Second, the early stages of development are often long because members need to learn to work with higher levels of diversity and complexity. Third, it takes time to build trust and teamwork, especially among people with different experiences and perspectives. Finally, organizations characterized by flat structures with evenly dispersed power (see the chapter on organization structure) may derive the least benefit from cross-functional teams. In these structures, dispersed power leads to longer conflict resolution processes, but more compelling, the flatter structure reduces the need for cross-functional teams as employees usually already have processes in place to coordinate and share knowledge.[22]

In sum, the strength of traditional cross-functional teams is the collaborative effort of individuals with diverse skills from a variety of disciplines. When the unique perspectives of these members are considered, these teams can be very effective. However, the ambiguity, conflict, and complexities surrounding the formation of a cross-functional team can lead to issues in their success. One study of nearly one hundred cross-functional teams across twenty-five major corporations found that they had a success rate of only 25 percent.[23] Can anything be done to improve their success rate? One solution is to develop a certain type of cross-functional team, a *portfolio governance team (PGT)*, in which team *leaders* from different functions and who govern different teams work together to accomplish tasks.[24] Once these teams are up and running, they can accomplish the same aims as cross-functional teams, but with the power of the teams each leader oversees and with less opportunity for conflict. Outside PGTs, cross-functional teams can also be made more successful by: [25]

1. Establishing an accountable leader who is responsible from the team's formation to its dissolution.
2. Ensuring that each team has established goals, resources, and deadlines.
3. Establishing a clear mission for the team that acts as their main objective.
4. Continuously reevaluating the team and its progress toward success.
5. Reconsidering the usefulness of the team if it is unsuccessful.

Virtual Teams

virtual team A team of employees that uses technology to tie together physically dispersed members in order to achieve a common goal.

The teams described in the preceding section do their work face-to-face, whereas **virtual teams** use technology to unite physically dispersed members to achieve a common goal.[26] Members collaborate online using networks (e.g., via the company intranet), corporate social media, videoconferencing, e-mail, and messenger applications—whether members are nearby or continents apart. Although the COVID-19 context will probably result in virtual teams becoming a permanent fixture of the organizational landscape,[27] organizations have been successfully leveraging virtual teams for decades. As an example, Cisco relies on teams to identify and capitalize on new trends in several areas of the software market. Its teams are the equivalent of social networking groups of employees from different areas that collaborate in real time to identify new business opportunities and implement them from the bottom up.[28]

Virtual teams should be managed differently than in-person teams, partially because virtual team members may not interact in the same way. For instance, virtual environments differ from in-person environments in the ways they convey social cues and foster a sense of distance between people.[29] As another example, although virtual teams may share more unique information with one another than in-person teams, managers should be aware that they may be less open to sharing information with one another.[30] As such, for virtual teams to be effective, trust is very important.[31] Management should ensure that (1) trust is established among members (one inflammatory remark in an e-mail can severely undermine team trust), (2) progress is monitored closely (so the team does not lose sight of its goals and no team member "disappears"), and (3) the efforts and products of the team are publicized throughout the organization (so the team does not become invisible).[32] Managers should also carefully select who will be a member of a virtual team because working on a virtual team may require different competencies.[33]

Multiteam Systems

multiteam system A collection of two or more interdependent teams that share a superordinate goal; a team of teams.

The types of teams we have described so far are typically smaller, stand-alone teams, although their activities relate to the broader objectives of the organization. Typically, a single team alone cannot fulfill an organization's broad objectives. Often, it takes an entire system of teams collaborating with and among one another and who contribute in their own ways to realizing the organization's objectives. These systems, deemed **multiteam systems**, are composed of collections of two or more interdependent teams that share a superordinate goal. In other words, multiteam systems are a "team of teams."[34]

To picture a multiteam system, consider NASA's plans to send a team of astronauts to Mars.[35] In order to make this mission a success, countless teams of researchers, scientists, professors, engineers, operations employees, ground crews, and psychologists are needed. Although the research and operations teams, for example, are technically independent, their activities are interdependent, and the success of one depends on the success of the others. Why? Because they all share the higher goal of sending the astronauts to Mars.

Some factors that make smaller, more traditional teams effective do not necessarily apply to multiteam systems and can even hinder their performance. One

An Ethical Choice

The Size of Your Meeting's Carbon Footprint

Despite being in different countries or even on different continents, many teams in geographically dispersed locations communicate without regularly meeting in person, and their members may never meet each other outside a virtual context. Although the merits of in-person versus virtual communication have been debated, there may be a strong ethical argument for virtual teams.

Keeping team members where they are as opposed to having them travel every time they need to meet may be in line with corporate social responsibility (CSR) initiatives. A very large proportion of airline, rail, and car transport is for business purposes and contributes greatly to global carbon dioxide emissions. When teams are able to meet virtually rather than in person, they dramatically reduce their carbon footprint.

In a globally connected world, how might you minimize your organization's environmental impact from business travel? Several tips might get you started thinking about ways that virtual teams can be harnessed for greater sustainability:

1. **Encourage all team members to think about whether an in-person meeting is really necessary.** Try to utilize alternative communication methods whenever possible.
2. **Communicate as much as possible through virtual means.** This includes e-mail, telephone calls, and videoconferencing.
3. **When traveling to team meetings, choose the most environmentally responsible travel methods possible.** Also, check the environmental profile of hotels before booking rooms.
4. **If the environmental savings are not enough motivation to reduce travel, consider the financial savings.** According to one survey, businesses spend about 8 to 12 percent of their entire budget on travel. Communicating electronically can therefore result in two benefits: (1) It is cheaper, and (2) it is good for the environment.[44]

study showed that multiteam systems performed better when they had "boundary spanners" whose jobs were to coordinate with all constituents. This reduced the need for some team member communication, which was helpful because it reduced coordination demands.[36] Conversely, some members may emerge as "boundary spoilers," who can hinder effective coordination when they communicate inaccurate perspectives or practices to members of other teams.[37] Some teams within a multiteam system may also have different perspectives that actually hinder effective communication and coordination; in these instances, these teams could benefit from training in which all teams adopt the same perspectives or assumptions (e.g., "getting on the same page").[38]

Relatedly, employees can, in some cases, identify with either their own team or the multiteam system as a whole. When multiteam systems are first established, strong identification to one's own team can lead to conflicts between teams—by developing an identification with the multiteam system as a whole, conflicts can be reduced, and the performance of the whole system can be improved.[39] However, identification with the multiteam system as a whole can be a "double-edged sword"; it can also lead to uncertainty regarding which norms to follow and role expectations across teams (see the chapter on foundations of group behavior), ultimately leading employees and their teams to become depleted and perform worse as a result.[40] Multiteam systems may also enjoy higher performance when planning is decentralized, but they may also have more problems with coordination.[41]

Leadership of multiteam systems is also much different than for stand-alone teams. While leadership of all teams affects team performance, a multiteam leader must both facilitate coordination between teams and lead them.[42] Teams that receive more attention and engagement from the organization's leaders may feel more empowered, which may make them more effective as they solve their own problems.[43]

Creating Effective Teams

10-3 Identify the characteristics of effective teams.

Teams are often created deliberately but sometimes evolve organically. For example, tech startup teams are often started naturally by friends; in Noam Wasserman's research of over ten thousand tech startups, nearly 40 percent of founders were friends before going into business.[45] Interestingly, being friends increases the likelihood of failure, and for each additional friend on the founding team, Wasserman suggests, the likelihood of the founders leaving the startup increases by nearly 30 percent.[46]

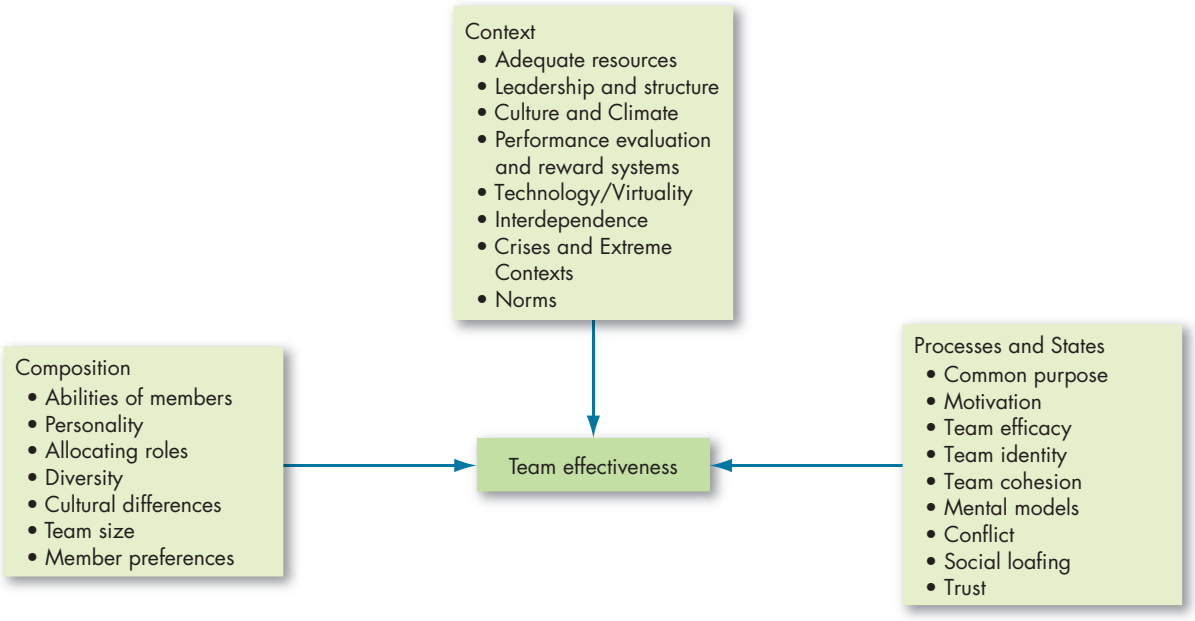
Many people have tried to identify factors related to team effectiveness. To help, some studies have organized what was once a large list of characteristics into a relatively focused model.[47] Exhibit 10-3 summarizes what we currently know about what makes teams effective. As you will see, it builds on many of the group concepts introduced in the previous chapter. We can organize the key components of effective teams into three general categories. First are the resources and other *contextual* influences that make teams effective. The second relates to the team's *composition*. Finally, *process* and *state* variables are events within the team that influence effectiveness. We will explore each of these components next.

In considering the team effectiveness model, keep in mind two points. First, as we have discussed, teams differ in form and structure. The model attempts to generalize across all varieties of teams but avoids rigidly applying its predictions to all teams.[48] Use it as a guide. Second, let us consider what *team effectiveness* means in this model. Typically, team effectiveness includes objective measures of the team's productivity, managers' ratings of the team's performance, and aggregate measures of member satisfaction.

Team Context

In this section, we discuss five of the contextual factors that most significantly relate to team performance: *adequate resources, leadership and structure, culture and climate,* a *performance evaluation and reward system* that reflects team contributions, and *crises and extreme contexts.* Although technology/virtuality, interdependence, and norms

Exhibit 10-3 Team Effectiveness Model



are also included under context in Exhibit 10-3, they have already been discussed earlier in this chapter and in the chapter on foundations of group behavior.

Adequate Resources Teams are part of a larger organization system; every work team relies on resources outside the group to sustain it. A scarcity of resources directly reduces the ability of a team to perform its job effectively and achieve its goals. As one study concluded after looking at thirteen factors related to group performance, "perhaps one of the most important characteristics of an effective work group is the support the group receives from the organization."[49] This support includes timely information, proper equipment, adequate staffing, encouragement, and administrative assistance.

Leadership and Structure Teams cannot function if they disagree on who is to do what and do not ensure that all members share the workload. This requires leadership and structure, either from management or from team members themselves.[50] Beyond initiating structure for team members, leaders play critical motivational roles for team members. For example, well-performing teams tend to have leaders who are transformational (see the chapter on leadership) and empowering.[51] Furthermore, the relationship between the leader and their team member followers has been found to be more important for job attitudes, job performance, and turnover intentions than the relationships between team members themselves.[52] Furthermore, it is important for these relationships to be similar and equitable; if leaders "play favorites" with particular team members, this can have a detrimental effect on group processes and states.[53]

Culture and Climate As will be discussed in the chapter on organizational culture, culture (e.g., organizational values, beliefs, and assumptions) and climate (e.g., organizational policies, practices, and procedures) are very important in organizations. However, teams can have their own cultures and climates that influence their effectiveness. For example, one study of teams within a Taiwanese technology company found that team climates that promote collaboration can lead teams to become more motivated and creative.[54] Earlier research on team climates specifically focused on policies, practices, and procedures related to team effectiveness. These studies suggest that a shared sense of vision, a sense of being able to share and collaborate in a nonthreatening environment, a concern for performance quality, encouragement of creative and innovative solutions, and practicing regular, frequent interaction are the most important factors for team climate.[55] Research in bank teams in Spain and research and development (R&D) teams in Australia has supported the importance of these factors for teams, with strong team climates leading to increased team financial performance (e.g., sales made) as well as innovation performance (e.g., speed to innovation, project completion).[56] Over the past decade, more research has examined the effects of different climates in teams. For example, perceptions of fair and just policies, practices, and procedures have proved very important for team attitudes, conflict, and performance.[57]

Performance Evaluation and Reward System Individual performance evaluations and incentives may interfere with the development of high-performance teams. So, in addition to evaluating and rewarding employees for their individual contributions, management should utilize hybrid performance systems that incorporate individual rewards to recognize individual contributions and group rewards to recognize positive team outcomes.[58] Group-based appraisals, profit sharing, small-group incentives, and other system modifications can reinforce team effort and commitment. Furthermore, when instituting a performance management system, constructive feedback can have a positive effect on team performance.[59] However, one should take care to avoid bias and discrimination in implementing a team reward system: Research demonstrates that teams composed of primarily Black employees tend to be stigmatized to a greater degree (and paid less) than those composed of White employees.[60]

Crises and Extreme Contexts Crises and extreme contexts are a crucible in which the merits of teams can be put to the test. These contexts can unlock the potential of team members who do truly great things under stress. They can also lead to the unraveling of the team fabric, resulting in disaster. As an example, in the Mann Gulch fire of 1949, dozens of smokejumpers (i.e., elite firefighters who are airlifted to fight wildfires) led by foreman "Wag" Dodge were dispatched to an area south of the Mann Gulch valley in Montana after a lightning storm caused a wildfire.[61] Illustrating how quickly crises can escalate and unravel a team, Dodge saw the fire was moving toward them at six hundred and ten feet per minute with thirty-foot high flames. The team turned around and headed up the 76 percent grade mountain toward the ridge. They were quickly losing ground, and Dodge yelled for everyone to drop their tools, lit a fire in front of them, and told them to lie down in the area he had burned. No one listened, and they all ran for the ridge. Dodge lived by lying down in the ashes of his escape fire.[62]

Disasters and extreme contexts alike have attracted a lot of research attention from OB researchers in the past several decades. From astronauts in long-duration space missions to health professional teams responding to crises during the COVID-19 pandemic, teams may find themselves in extreme, disastrous contexts and must act quickly together to perform their duties.[63] Research on multiteam systems in disaster environments demonstrates that people tend to default to gathering information rather than taking action—when they do take action, they do so without deliberately considering the context or options or even forming a plan.[64]

Several factors play a role in influencing team success during crises. Leaders are extremely important—just consider Dodge's role in the Mann Gulch fire. Leaders are most effective during disasters when they support team problem solving, are supportive of the team members, initiate structure and planning, delegate, and coordinate as well as help team members make sense of the situation.[65] Structure also plays an important role. *Team scaffolds* (i.e., fluid, underlying structures that establish role types, shared responsibilities, and boundaries in teams) have been shown to help support coordination during crises because they establish accountability, a shared understanding, and a sense of identity or belonging.[66] Indeed, this fluidity and flexibility are important for teams in crisis, as higher-performing teams tend to be adaptable and exhibit few, short, and simple interaction patterns.[67] As for individual team members during times of crisis, positive affectivity (PA; see the chapter on personality and individual differences) can help buffer the negative impact of the strain of the crisis situation.[68] Finally, informed decision making is critical, as team members should know where to target decision making (e.g., toward the problem or the coordination of team members), how to share information effectively with team members, and when to reflect on team objectives, processes, and strategies before acting.[69]

Team Composition

Maria Contreras-Sweet, former head of the U.S. Small Business Administration, said, "When I'm building a team, I'm looking for people who are resourceful. I need people who are flexible, and I really need people who are discreet.… Discreetness also speaks to integrity."[70] These are good qualities, but not the only ones we should consider when staffing teams. The team composition category includes variables that relate to how teams should be staffed: The *abilities* and *personalities* of team members, *allocation of roles, diversity* and *cultural differences* (see also the requisite chapter on diversity, equity, and inclusion in organizations.), *size* of the team, and *members' preferences* for teamwork. As you can expect, opinions vary widely about the type of members leaders want on their teams, and some evidence suggests that compositions may be more or less important at different stages of team development.

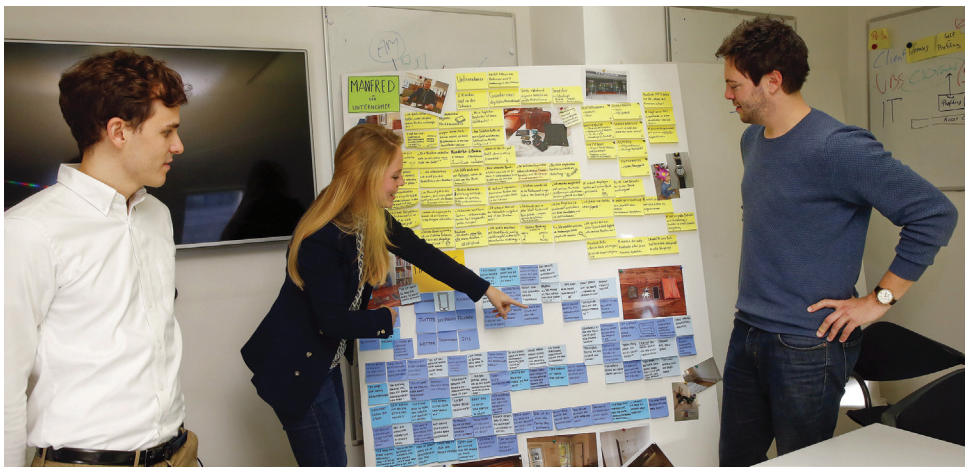
Abilities of Members It is true we occasionally read about an "underdog" team of mediocre players who, because of excellent coaching, determination, and

teamwork, beat a far more talented team. But such cases make the news precisely because they are unusual. A team's performance depends in part on the knowledge, skills, and abilities of individual members.[71] Abilities set limits on what members can do and how effectively they will perform on a team. Research suggests that a number of groups of abilities are helpful to be an effective team member, namely conflict resolution, collaborative problem solving, communication, goal setting, and planning abilities/skills.[72] In general, despite being weakly related to team performance, complementary backgrounds (e.g., education level, area of expertise, and abilities) also tend to be more strongly related to innovation and creativity in practice.[73] It is also worth noting that, over time, the experiences of team members add up to improve performance by enhancing the way problems are solved as members learn to work together.[74] In other words, team members develop their knowledge, skills, and abilities—learning how to work with one another over time.

Personality of Members We demonstrated in the chapter on personality and individual differences that personality traits significantly influence behavior. Some dimensions identified in the Big Five personality model are particularly relevant to team effectiveness.[75] Conscientiousness is especially important to teams.[76] Conscientious people are good at backing up other team members and sensing when their support is truly needed.

What about the other traits? Teams that are more agreeable tend to perform better. The level of team member agreeableness matters, too: Teams do worse and are less cohesive when they have disagreeable members, and a wide span in individual levels of agreeableness can lower productivity.[77] Open team members are willing to share more ideas with one another, which makes teams composed of open people more creative and innovative.[78] Teams confronted with task conflict will likely perform better when they are composed of members with high levels of emotional stability.[79] It is not so much that the conflict itself improves performance for these teams but that teams characterized by emotional stability are able to handle conflict and leverage it to improve performance. Research is not clear on the outcomes of extroversion, but one study indicated that a high mean level of extroversion in a team can increase the level of helping behaviors, particularly in a team climate of cooperation.[80] Beyond the Big Five, recent research has suggested that team proactive personality (see the chapter on personality and individual differences) is important for team innovation.[81] Thus, the personality traits of individuals are as important to teams as the overall personality characteristics of the team.

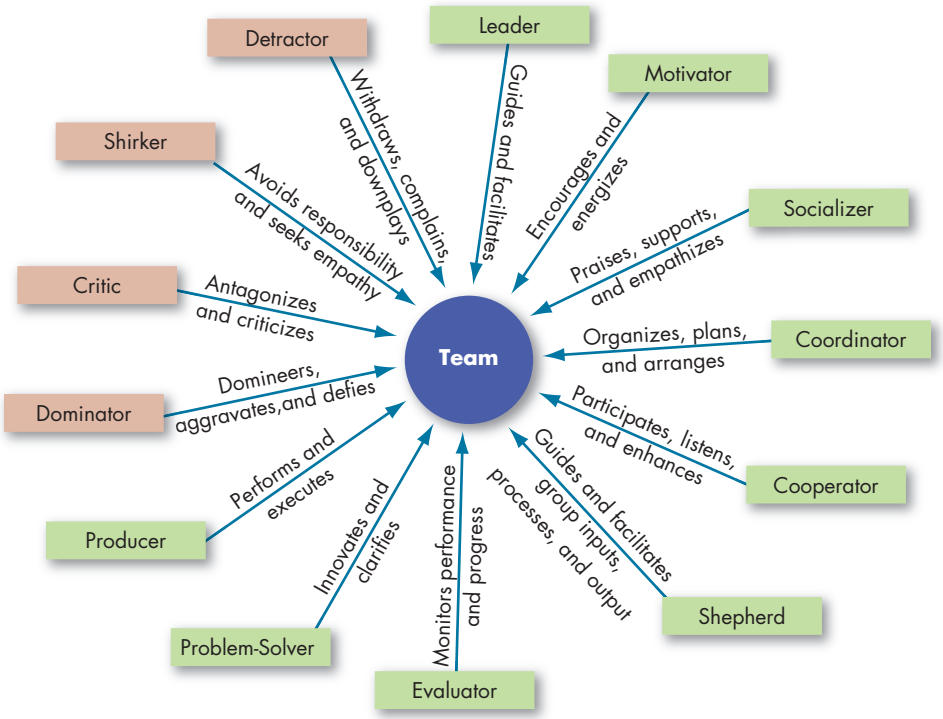
Allocation of Roles Teams have different needs, and members should be selected to ensure that all the various roles are filled.[82] A study of 778 major league baseball teams over a twenty-one-year period highlights the importance of assigning roles appropriately.[83] As you might expect, teams with more experienced and



Members of a research team at the innovation lab of Swiss bank UBS are testing digital, virtual reality, and other new technologies to attract a young generation of investors and to help current clients visualize complex investment portfolios. Team members have the technical expertise and skills needed to function as a high-ability team.

Source: Arnd Wiegmann/Reuters

Exhibit 10-4 Key Roles of Teams



Sources: Based on T. Driskell, J. E. Driskell, C. Shawn Burke, and E. Salas, "Team Roles: A Review and Integration," *Small Group Research* 48, no. 4 (2017): 482–511.

skilled members performed better. However, the experience and skill of those in core roles who handled more of the workflow of the team and were central to all work processes (in this case, pitchers and catchers) were especially vital.

We can identify thirteen potential team roles (see Exhibit 10-4). Successful work teams have selected people to play most of these roles based on their skills and preferences and to avoid the four roles that are generally negative for team functioning (e.g., dominator, critic, shirker, and detractor).[84] On many teams, individuals will play multiple roles. For instance, leaders will also likely be motivators, coordinators, shepherds, and evaluators. To increase the likelihood that team members will work well together, managers need to understand the individual strengths each person can bring to a team, select members with their strengths in mind, and allocate work assignments that fit with members' strengths. This is especially a challenge for founding entrepreneurs, given that entrepreneurial teams often have similar characteristics and strengths.[85]

Diversity of Members In the chapter on diversity, equity, and inclusion in organizations we discussed the nature of diversity in groups and how it affects group dynamics within the group. But *how* does team diversity affect team performance? The degree to which members of a work unit (group, team, or department) share a common demographic attribute, such as age, gender identity, race, educational level, or organizational tenure, is the subject of **demography**. Demography is a term used to describe the level of diversity in groups and teams and suggest that attributes such as age or the date of joining should matter for organizations, such as in the prediction of conflict.

demography The degree to which members of a work unit share a common demographic attribute, such as age, gender identity, race, educational level, or organizational tenure.

The logic goes like this: Conflict will be greater among those with dissimilar experiences because communication is more difficult. Similarly, the losers of a

conflict are more apt to leave voluntarily or be forced out.[86] A premature conclusion following this logic would be that diversity always negatively affects team performance. However, recall that in the chapter on diversity, equity, and inclusion in organizations we discussed how diversity in groups and teams (e.g., demography) initially results in negative outcomes but can eventually lead to positive outcomes over time.[87] If the diverse team sticks it out and stays together over time, they can reach desirable performance levels. Moreover, they are less likely to fall victim to conformity, are more likely to share more information with one another, make fewer errors, and may be more creative than non-diverse teams.[88]

Cultural Differences We have discussed research on cultural diversity in the chapter on diversity, equity, and inclusion in organizations. For teams, the evidence indicates that cultural diversity interferes with team processes, at least in the short term. In general, cultural diversity seems to be an asset for tasks that call for a variety of viewpoints. But culturally heterogeneous teams have more difficulty learning to work with each other and solving problems. The good news is that these difficulties seem to dissipate with time. But let us dig a little deeper. Some researchers have found that the team benefits of cultural diversity depend upon the team's cultural composition

Toward a Better World

Hershey: Advancing Diversity, Equity, and Inclusion Through Groups and Teams

The Hershey Company, one of the top fifty companies for diversity according to Diversity Inc., attributes much of its success to its *Business Resource Groups (BRGs)*. These groups are geared toward advancing diversity, equity, and inclusion (DEI) at Hershey. They accomplish their aims through teams that work together to attract and retain diverse employees, provide business insights to various work units, and connect people from different backgrounds. There are a total of eight of these groups at Hershey, including Abilities First, African American, Asian, GenH (Generations), Latinx, Prism (LGBTQ), Veteran's, and Women's, all of which are employee-led and geared toward creating a welcoming and inclusive work environment. Together, these eight groups comprise a multiteam system, all working together toward the same goals of DEI. Representatives from the BRGs frequently meet with hundreds of senior leaders at Hershey to provide leadership development for facilitating growth and conversation in dealing with prejudice, discrimination, and emotionally charged current events.

They provide a space for employees to autonomously band together to brainstorm new opportunities and pursue DEI objectives with other passionate employees. Teams within the BRGs collaborate with executive leadership and other work units and teams to ensure all employees' interests are represented and spearhead company initiatives to fulfill the company's DEI objectives. These teams also work to engage new employees at Hershey. For instance, Jenny Fukumoto-Pasko recalls when she started as an associate brand manager: "I knew I wanted to impact both the business and the people. I was a freshly-MBAed marketer with diversity, equity, and inclusion on her mind. Within six months, I threw myself into two things that fill my energy tank to the brim: recruiting and empowering women through joining the recruitment team and Women's Business Resource Group (WBRG)." The Hershey Company is, indeed, a very welcoming place for women. Women occupy many of the top executive positions within the company (e.g., CEO, board chair, chief growth officer) and board of director positions, exactly half of the Hershey workforce is composed of women, and women earn ninety-nine cents on the dollar when compared with men.

As another example of how BRG teams advance their aims, Latinx BRG teams collaborate with the Hershey commercial team to connect to the growing segment of Latinx customers. As a result of these collaborations, Hershey has won recognitions and awards for its positive portrayals of Latinx people in the media, including a "best on-air advertising" award from Telemundo for a Mother's Day ad. Teams also collaborate with others outside the company. For instance, the Latinx BRG collaborates with the Latinx Hispanic American Community Center's youth leadership program. Many teams volunteer to provide leadership development and mentorship to Latinx youth. These BRGs capitalize on their members' diverse expertise to place them in roles best suited to their abilities and backgrounds. For example, in the mentorship program, one of the students was interested in pursuing a political science career. This student was matched with the Hershey senior manager of government relations, Limer Batista. In general, the Hershey Company is a great example of how companies can leverage both groups and teams to further DEI initiatives.[89]

(e.g., majority members versus minority members). Researchers found that cultural differences negatively affected team performance for cultural majority members—however, cultural differences positively affected team performance for cultural minority members.[90] This suggests that, as teams become more diverse, minority members tend to benefit more from the increased diversity than majority members.

Team Size As we noted in the chapter on group behavior, group size is a key characteristic of any group or team. Many experts believe that keeping teams small is key to improving group effectiveness.[91] Amazon Chair Jeff Bezos uses the "two-pizza" rule, saying, "If it takes more than two pizzas to feed the team, the team is too big."[92] Psychologist George Miller claimed that "the magical number [is] seven, plus or minus two," for the ideal team size.[93] The potential connections between people grow exponentially as team size increases, thus complicating communications and leading to decreased perceptions of support in bigger teams.[94]

Experts suggest using the smallest number of people who can do the task. Unfortunately, managers often err by making teams too large because they believe more people means more benefits (while increasingly underestimating the number of hours required to complete projects and other losses associated with adding more people).[95] When teams have excess members, cohesiveness and mutual accountability decline, social loafing increases, and people communicate less.[96] Members of large teams have trouble coordinating with one another, especially under time pressure. When a natural working unit is larger and you want a team effort, consider breaking the group into subteams.[97]

Member Preferences Not every employee works well in teams. Given the option, many employees will select themselves *out* of team participation. When people who prefer to work alone are required to team up, there is a direct threat to the team's morale and to individual member satisfaction.[98] This suggests that, when selecting team members, managers should consider individual preferences along with abilities, personalities, and skills. High-performing teams are likely to be composed of people who prefer working as part of a group.

Team Processes and States

The final category related to team effectiveness includes processes (e.g., procedures, activities, and behaviors) and team states (e.g., collective emotional, attitudinal, or motivational states) such as member commitment to a *common plan and purpose, motivation, team efficacy, team identity, team cohesion, mental models, conflict, social loafing*, and *trust*. These characteristics tend to be excellent predictors of team performance and team member attitudes. They are especially important in larger teams and in teams that are highly interdependent.[99]

Team Processes Why are processes important to team effectiveness? Teams should create outputs greater than the sum of their inputs. Exhibit 10-5 illustrates how group processes can have an impact on a group's effectiveness.[100]

Common Plan and Purpose Effective teams begin by analyzing the team's mission, developing goals to achieve that mission, and creating strategies for

Exhibit 10-5 Effects of Team Processes



achieving the goals.[101] Teams that consistently perform better have a clear sense of what needs to be done and how.[102] This sounds obvious, but many teams ignore this fundamental process.

Members of successful teams put a tremendous amount of time and effort into discussing, shaping, and sharing a purpose that belongs to them collectively and individually. This common purpose, when accepted by the team, becomes what a GPS is to a ship captain: It provides direction and guidance under any conditions. Like a ship following the wrong course, teams that do not have good planning skills are doomed, executing the wrong plan.[103] Teams should agree on whether their purpose is to learn about and master a task or simply to perform the task; evidence suggests that differing perspectives on learning versus performance lead to lower levels of team performance overall. Furthermore, engaging in effective planning processes is also easier when members strongly identify with their team.[104]

Effective teams show **reflexivity**, meaning they reflect on and adjust their purpose when necessary.[105] As some examples, reflexivity can help improve psychological well-being in manufacturing teams, help startup teams learn from their setbacks, help research and development teams innovate, and can help improve performance in extreme environments, like hospital emergency rooms.[106] A team must have a good plan, but team members need to be willing and able to adapt when conditions call for it.[107] Reflexivity is especially important for teams that have had poor performance in the past.[108] Some evidence suggests that teams high in reflexivity are better able to adapt to conflicting plans and goals among team members.[109]

reflexivity A team characteristic of reflecting on and adjusting the master plan when necessary.

Mental Models The members of an effective team share accurate **mental models**. In other words, they share an understanding of the key elements within their task environment.[111] If team members have the wrong mental models, which is particularly likely in teams under acute stress, their performance suffers.[112] Teams with shared mental models engage in more frequent interactions with one another, are more motivated, have more positive attitudes toward their work, and have higher levels of objectively rated performance.[113] For instance, teams of firefighters who have a

mental model Team members' shared knowledge about the key elements within their task environment.

Myth or Science?

Teams Should Practice Collective Mindfulness

There is evidence that when individuals practice mindfulness, it can reduce stress and anxiety. It can also increase resilience, divergent thinking, and job satisfaction and even improve focus and leadership flexibility. But is it enough for individuals to practice mindfulness? Will this alone benefit the organization and its teams? The answer is that a team's culture will likely be more influential than an individuals' own mindfulness practices. For example, even if an individual has developed their emotional regulation skills, this will not be enough if they are a member of a toxic team.

This is where collective mindfulness comes into play. Collective mindfulness is a shared practice among team members in which they interact with one another with awareness and attention to the present experiences. Teams practicing mindfulness also engage in nonjudgmental processing of experiences within the team, such as stress about an upcoming deadline. Through this practice, a team can become more collectively aware of the team's dynamics, objectives, structures, roles, and tasks. Results from a study of team mindfulness indicate that the effects of collective mindfulness are more significant than if mindfulness was practiced by team members alone at the individual level.

As such, there appears to be a business case for collective mindfulness. Research shows that the practice of collective mindfulness can lead to several desirable outcomes for teams. These outcomes include creating a psychologically safe environment, reducing relationship conflict within the team, better innovation performance, and increasing employees' well-being and job satisfaction.

How can you lead your team to practice collective mindfulness? By treating it as a team process—as you interact with your team, encourage members to observe, learn, and experience how your team as a unit approaches its tasks and goals and critically evaluate its norms. To practice collective mindfulness, all members need to mutually adjust based on this understanding of the team processes. By experiencing and learning from what the team goes through with focus and nonjudgment, this process can become routine and reinforced within the team over time.[110]

shared understanding of the tasks they need to perform in an emergency context are better able to adapt and act as a group, leading to better team performance.[114] If team members have different ideas about the task environment, however, the team will misunderstand one another frequently, overlook key aspects of the task, or argue over methods rather than complete their work as a unified group.[115]

Teams should also develop *transactive memory systems*, which represent the ways in which team members collect, integrate, generate, and distribute knowledge to develop a shared understanding of their environment.[116] For example, structures and systems that enable team members to know "who knows what and is best at what" ensure that the most-skilled members are assigned tasks for which they are best suited and the most knowledgeable are consulted for advice on issues aligned with their expertise.[117] Transactive memory systems are important for performance, especially in collectivist and high-power-distance cultures, for top management teams of executives, and in environments that are particularly volatile (e.g., times of crisis).[118] Without transactive memory systems, the turnover of a particularly critical team member can have devastating effects on team performance.[119] For instance, employees in work teams often find themselves scrambling to understand how to perform the work of a coworker who recently left.

An anesthetic team in a hospital is one example of a team in which it is absolutely critical to develop shared mental models. Here, a shared understanding of the equipment, technology, tasks, emergency contingencies, team member roles, interdependencies, and even fellow team members' communication styles, preferences, habits, and quirks is essential to avoid accidental death in the operating room.[120] Of course, transactive memory systems are also critical for these teams. For example, research in Switzerland found that anesthetic teams communicated two distinct types of messages while in an operation: Vocally monitoring each other's performance (not to criticize but to keep a vocal record of events) and "talking to the room" (announcements to everyone such as "Patient's blood pressure is dropping"). The study found that high- and low-performing teams communicated in these ways equally often; what mattered to performance was the sequencing of the communication to maintain a shared mental model. High-performing teams followed up monitoring dialogue with assistance, instructions, and talking-to-the-room dialogue with further team dialogue.[121] The message seems simple: To maintain shared mental models, communicate about what is happening while the team is in operation!

Team Conflict Conflict has a complex relationship with team performance, and it is not necessarily bad (see the chapter on conflict and negotiation). Although we have previously described *role conflict* in the prior chapter on group behavior, we discuss three additional types of conflict in teams in this section.[122] *Relationship conflict*—conflict based on interpersonal incompatibility, tension, and animosity toward others—is almost always dysfunctional, especially among friends.[123] However, when teams are performing nonroutine activities, disagreements about task content—called *task conflict*—stimulate discussion, promote critical assessment of problems and options, and can lead to better team decisions. Finally, a newer form of *ethical conflict* describes the ways in which team members disagree about ethical issues.[124] For instance, employees at a customer service counter of a grocery store may have different perspectives of the "right" and "wrong" way to handle a customer dispute about a coupon.

The positive (and negative) effects of conflict on performance may be smaller or larger depending on many factors, such as the task type, the setting, and how performance is measured.[125] Task conflict is beneficial when members are open to experience and emotionally stable.[126] Task conflict may also be beneficial when some team members perceive high task conflict while other team members perceive low task conflict.[127] Moderate levels of task conflict during the initial phases of team performance are positively related to team creativity, but both very low and very high levels of task conflict are negatively related to team performance.[128] In

other words, both too much and too little disagreement about how a team should initially perform a creative task can inhibit performance.

The way conflicts are resolved can make the difference between effective and ineffective teams. A study of ongoing comments made by thirty-seven autonomous work groups showed that effective teams resolved conflicts by explicitly discussing the task disagreements, whereas ineffective teams had unresolved conflicts that were focused more on personalities and the way things were said.[129] Teams experiencing early-stage relationship conflict, on the other hand, can rebound and become more cohesive after initial conflict if the members engage in cognitive reappraisal, an emotion regulation strategy discussed in the chapter on emotion and mood.[130]

Which teams are more likely to have conflict than others? It is not a simple answer. Some research found that when individual team members varied greatly in their perceptions of organizational support, task conflict increased, communication decreased, and ultimately team performance suffered.[131] If the researchers had instead compared only the average level of organizational support given to the team rather than how members perceived the support, they would have missed the correct causal links. Another study of teams found that those high in social capital experienced higher task conflict and lower relationship conflict, but this was only true after the group had been established for several years.[132] Thus, we need to be careful not to overgeneralize the effects of composition on conflict.

Perhaps what is more important are the conditions that prompt conflict to emerge (e.g., discussing problems and potential solutions is much more likely to lead to conflict than talking about off-task topics) and those that resolve conflict (e.g., intervention by a supervisor or authority figure).[133] For instance, team member turnover may inevitably lead to task conflict,[134] especially when there is a lack of a shared mental model and transactive memory system, as discussed earlier.

Social Loafing As we noted in the prior chapter on group behavior, individuals can engage in social loafing and coast on the group's effort when their contributions (or lack thereof) cannot be identified. Effective teams undermine this tendency by making members individually and jointly accountable for the team's purpose, goals, and approach.[135] Therefore, members should be clear on what they are individually and jointly responsible for on the team.

Team States Beyond team processes, emergent *states* are also critical to team effectiveness. These collective attitudinal, emotional, and motivational states are important because they guide how team members approach teamwork. The context, structure, and processes within a team can all be in place, but without positive emergent states, team members may be less motivated to work together.

Motivation Successful teams translate their common purpose into specific, measurable, and difficult (yet realistic) performance goals that align with team objectives (see the chapter on motivation theory).[136] So, for instance, goals for quantity tend to increase quantity, goals for accuracy increase accuracy, and so on.[137] Furthermore, goals intended to improve team member performance (instead of team performance as a whole) have the tendency to *undermine* group performance.[138] As such, individual goals should be linked to the actual goals of the group. Furthermore, motivational factors beyond goals matter. For instance, beyond goal setting, the actual experience of striving toward a goal involves wins, setbacks, and conservation of energy. Teams that are geared toward achievement tend to perform better over time.[139] Additionally, teams that are strategic in how they allocate their resources and energy tend to perform better. For example, one study of five National Hockey League (NHL) seasons suggests that teams that are strategic in when they bench their most valuable players tend to have better end-of-season records than other teams.[140]

Team Efficacy Effective teams have confidence in themselves; they believe they can succeed. We call this **team efficacy**.[141] Teams that have been successful raise

team efficacy A team's collective belief that they can succeed at their tasks.

their beliefs about future success, which in turn motivates them to work harder. Prior research has demonstrated that team efficacy is strongly predictive of team performance, especially when team members are dependent upon one another to contribute to team goals.[142] The order in which interdependent team tasks are completed also matters. In one study of more than three hundred thousand swim meets, researchers found that swimmers in the latter part of their teams' relay were more likely to experience increases in motivation when they believed they could successfully win the meet for their team.[143] In addition, teams that have a shared knowledge of individual capabilities can strengthen the link between team members' self-efficacy and their individual creativity because members can solicit informed opinions from their teammates more effectively.[144]

What can be done to increase team efficacy? Two ways might be found in helping the team achieve small successes that build confidence and providing training to improve members' technical and interpersonal skills.[145] The greater the abilities of team members, the more likely the team will develop confidence and the ability to deliver on that confidence.

Team Identity In the previous chapter on group behavior, we discussed the important role of social identity in people's lives. When people connect emotionally with the groups they are in, they are more likely to invest in their relationship with those groups. It is the same with teams.[146] For example, research with soldiers in the Netherlands indicated that individuals who felt included and respected by team members became more willing to work hard for their teams, even though as soldiers they were already called upon to be dedicated to their units.[147] Similarly, when team identity is strong, team members who are highly motivated by performance goals are more likely to direct their efforts toward team goals rather than individual goals. Therefore, by recognizing individuals' specific skills and abilities, as well as creating a climate of respect and inclusion, leaders and members can foster positive **team identity** and improved team outcomes.[148] Managers should pay special attention to fostering team identity in virtual teams. Team identity may be lower in these teams, which can lead to lower effort on the part of virtual team members.[149]

team identity A team member's affinity for and sense of belongingness to their team.

Organizational identity is important, too. Although team identification is often stronger than other types of identification, rarely do teams operate in a vacuum—they are part of a larger organization and interact with other units, teams, and people.[150] Individuals with a positive team identity but without a positive organizational identity can become fixed to their teams and unwilling to coordinate with other teams within the organization.[151] In general, however, team identity serves an instrumental role in affecting team performance, attitudes, and cooperation: In other words, more positive organizational identification tends to lead to more positive team identification, which is beneficial for team outcomes.[152]

Team Cohesion Have you ever been a member of a team that really gelled, one in which team members felt connected? As described in the previous chapter on group behavior, cohesion occurs when team members form a shared bond that drives them to work together and stay together as a team. Recall from the previous chapter that cohesive groups and teams tend to perform better than noncohesive teams—evidence also suggests the reverse can be true (better performing teams can become more cohesive as a result of their successes).[153] Experiments on astronauts (to prepare for an eventual mission to Mars) in isolated, confined, and extreme environments such as those outside of Hawaiian volcanoes has found that cohesion tends to break down over several months into missions.[154] By studying factors that lead to these breakdowns in cohesion, researchers hope to improve astronaut team functioning. Several factors can increase team cohesion, such as sharing leadership responsibilities, open information sharing among team members, and interdependence among team members.[155]

Team Trust During the COVID-19 pandemic, it was clear just how important trust is to the successful operation of teams. Lindsay Kaplan, co-founder and

CEO of Chief, recounts life as a virtual manager during this time after a household emergency with her baby, "I text the marketing team that I'll likely be late to our team meeting… trust in my team is what's getting me through. I believe in hiring slowly, and it's rewarding to see our carefully curated team operate self-sufficiently."[156] Trust in teams entails a mutual, positive state of positive expectations between team members.[157] When you trust a team member, you believe in their reliability and dependability and are genuinely concerned for their welfare (and vice versa). Team trust evolves over time as members share with one another, put effort into the team, and monitor one another's performance.[158] Team trust has been shown to have a sizeable effect on team performance, especially in virtual teams.[159] Furthermore, research conducted with a sample of professional firefighting teams suggests that team trust can help serve to buffer the negative effects of the demands of the job on stress and strain.[160] Furthermore, although trust can be broken; research suggests that it can also be repaired.[161] Leadership plays a key role in facilitating trust and trust repair, and is important in facilitating team performance and creativity.[162]

Turning Groups of Employees into Teams

10-4 Explain how organizations can create effective teams.

Many organizations have historically gone to great lengths to hire, train, and reward team members given how important teams are to the success of organizations. As some examples, Don Yaeger (author and associate editor at *Sports Illustrated*) notes that organizations wish to hire people "who think team first"—instead of those who engage in self-centered behavior.[163] Search and rescue teams have also engaged in team training in order to hone team processes that lead to successful search and rescue missions.[164] Dental teams have also implemented team bonus plans in order to reward team performance.[165]

Selecting: Hiring for Team Effectiveness

Some people already possess the interpersonal skills to be effective in teams.[166] Therefore, managers, when hiring team members, try to be certain that candidates can fulfill their team roles as well as technical requirements.[167] As discussed in this chapter, a number of personality traits, abilities, and other characteristics lead to effective team performance—managers should be sure to hire applicants who have the highest potential to perform well in a team and strategically place them in teams where they are most likely to work well with the other team members.[168] Instead of hiring and placing individual members into teams, some managers are also engaging in *cluster hiring*, or the selection of an already-existing team to work in a new role.[169] This practice enables managers to circumvent the "growing pains" associated with forming a team from scratch, although such a practice involves a significant investment and risk if the team is large and its costs are expensive. Finally, given that remote work is becoming increasingly prevalent in the modern working world, managers would do well to select employees for virtual teams with the skills needed to excel in these environments (e.g., leadership, decision-making, interpersonal, and analytical skills).[170]

Training: Creating Effective Teams

Training specialists conduct exercises that enable teams to perform more effectively by learning relevant team skills and practices. A large body of research suggests that team training is effective at improving team member attitudes, team processes, and cognitive aspects like developing shared mental models and that these findings generalize to particularly important industries (e.g., medical services).[171] Especially important to team functioning, teams should be trained to develop shared mental models and transactive memory systems. Unfortunately, most companies suggest they struggle with this, and eighty-three respondents

to one survey indicated that they had problems accessing the information they needed to do their jobs. As Vishal Sharma, CTO at SearchUnify (an AI search platform) notes: "A company… that doesn't promote knowledge management also demotivates employees… if first- and second-line managers don't provide the latest technology to share knowledge and ensure visibility, workers end up feeling that the whole process is pointless and draining."[172] Virtual transactive memory systems are incredibly important, especially in this new paradigm of remote work where people do not meet in person as often as they once did. The COVID-19 pandemic highlights how quickly teams need to learn new skills, develop new knowledge, or learn how to work with one another in different ways. Siobhán Griffin, chief people officer (CPO) at Aer Rianta International (ARI, an airport retail holding company) recalls that "when COVID-19 hit, it hit aviation and travel retail hard. ARI, like all businesses needed to adapt quickly, to react and get ahead of the uncertainty. And we did just that… we developed clear plans and team training, which enabled us to re-open our stores, safely."[173] Team training is not just a one-time activity—the need for team training evolves over time, and managers would do well to keep a pulse on teams' training needs in their organizations.

Rewarding: Providing Incentives for Exceptional Teams

A traditional organization's reward system must be reworked to encourage cooperative efforts rather than competitive ones.[174] As Ashira Prossack, an internationally renowned business coach, notes, rewarding teams has the benefit of providing a common goal that every team member can work to achieve and gives each member an opportunity to be recognized. Overall, rewarding teams builds a more united bond and encourages the team to work together.[175] A number of companies offer team rewards, and not all of them are financial. For instance, Nick Vukmaravich, director of Sales of Pingboard, headquartered in Austin, uses experiences as team rewards. If the sales team meets the sales goals, they have been rewarded in the past with prizes like a full day touring the Texas wine country.[176] John Rampton, founder of the Calendar productivity tool, recalls how during the pandemic virtual celebrations like parties and movie nights have been great ways to maintain cohesion and reward team performance. Rampton notes, "A friend told me he'd had a virtual 'happy hour' with his team in the last few weeks, and everyone came! That's every single employee—unheard of before this mess."[177]



New engineering employees of India's Tata Consultancy Services (TCS) work in teams to construct paper boats during a team-building exercise at the firm's training center. Creating effective teams is essential to the success of TCS because employees must collaborate and work cohesively in providing information technology (IT) consulting services and business solutions for global clients.
Source: Namas Bhojani/Bloomberg/Getty Images

It is usually best to set a cooperative tone as soon as possible when setting rewards for teams. Teams that switch from competitive to cooperative motivations do not immediately share information, and they tend to make rushed, poor-quality decisions.[178] Conversely, although many managers like to create "friendly competitions" between teams to increase motivation and tie these competitions to team rewards, they should not be surprised when they get more trouble than they bargained for and the team climate shifts toward one that is competitive and full of conflict.

Of course, promotions, pay raises, and other forms of recognition can and should be given to individuals who work effectively as team members by training new colleagues, sharing information, helping resolve team conflicts, and mastering needed new skills. Team-based rewards have been shown to positively influence team performance, especially when they are distributed based on an individual's level of contribution (rather than equally distributed).[179] Again, this does not mean individual contributions should be ignored; rather, they should be balanced with selfless contributions to the team. Finally, do not forget the intrinsic rewards, such as camaraderie, that employees can receive from teamwork. It is exciting to be part of a successful team. The opportunity for personal development of oneself and teammates can be a very satisfying and rewarding experience. The "experience-based" rewards discussed earlier demonstrate how celebrations, opportunities for interaction, and even the roles themselves can be rewarding. Ben Affleck and Oscar Isaac, while filming *Triple Frontier* (about former Special Forces operatives and their difficulties in acclimating to civilian life), commented on the sense of loyalty, camaraderie, and teamwork they experienced in playing those roles (even permeating into their own lives outside their acting team).[180]

Beware! Teams Aren't Always the Answer

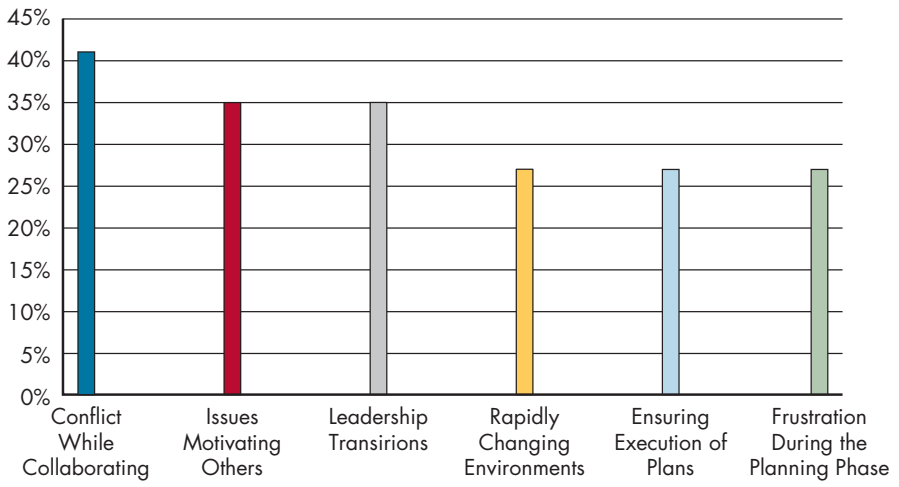
10-5 Decide when to use individuals instead of teams.

Teamwork takes more time and often more resources than individual work. Teams have increased communication demands, conflicts to manage, and meetings to run. So the benefits of using teams must exceed the costs, and that is not always possible.[181] Because of this, many otherwise effective employees may find themselves overwhelmed when there is too much of a focus on teams and teamwork or when team demands become excessive. As a result, many employees run into issues that can affect their morale (see OB Poll). Effective teamwork, as the name implies, requires work: Team members should have the resources to plan, execute, and adapt to changing environments; leadership transitions need to be handled smoothly, and both motivation and conflict need to be managed properly.

How do you know whether the work of your group would be better done in teams? You can apply three tests.[182] First, can the work be done better by more than one person? Good indicators are the complexity of the work and the need for different perspectives. Simple tasks that do not require diverse input are probably better left to individuals. Second, does the work create a common purpose or set of goals for the people in the group that is more than the aggregate of individual goals? Many service departments of new-vehicle dealers have introduced teams that link customer service people, mechanics, parts specialists, and sales representatives. Such teams can better manage collective responsibility for ensuring that customer needs are properly met. The final test is to determine whether the members of the group are interdependent. Using teams makes sense when there is interdependence among tasks—the success of the whole depends on the success of each one, *and* the success of each one depends on the success of the others. Soccer, for instance, is an obvious *team* sport. Success requires a great deal of coordination among interdependent players. Conversely, bowling teams are not really teams. They are groups of individuals performing individually and whose total performance is merely the aggregate summation of their individual performances.

OB POLL

Why Do Some Employees Not Like Working on Teams?



Source: Based on Simpli5, *Most Businesses Have a Teamwork Problem* [white paper] (Austin, TX: 5 Dynamics, 2019); "Why Your Employees Hate Teamwork," *Business News Daily*, March 24, 2020, https://www.businessnewsdaily.com/9616-employees-hate-teamwork.html

Summary

Teams have become an essential part of the workforce and make it possible for organizations to meet and transcend their mission and objectives. Unlike groups, which merely work toward a common goal or function, teams synergize, change, and adapt—working toward an outcome more remarkable than the sum of their individual contributions. Working on teams requires employees to cooperate with others, share information, confront differences, and sublimate personal interests for the greater good of the team. The distinctions between problem-solving, self-managed, cross-functional, virtual teams and multiteam systems help determine how team members interact and work together. Several aspects influence whether a team is successful or unsuccessful, including the team composition, the context in which it operates, the processes through which it accomplishes its goals, and collective states that characterize teams' motivations and emotions. For teams to function optimally, careful attention must be given to hiring, creating, and rewarding effective teams. Still, effective organizations recognize that teams are not always the most well suited for accomplishing some goals or objectives. Sometimes, work is better accomplished by individuals than by teams.

Implications for Managers

- Always start with the work to be accomplished. Begin with the mission, goals, and nature of the work to be completed and determine whether the work is best accomplished by individuals, groups, or teams.
- If a team is essential for fulfilling a particular mission or set of goals, select a team type or structure best suited toward meeting that goal.
- Sometimes, multiple teams are needed, and managers should consider how they will interact and coordinate.
- Managers need to establish contexts in which effective teams can flourish. By providing adequate resources to teams to fulfill their objectives, developing strong leadership and structure (essential

in crises), monitoring and rewarding team performance, and establishing policies and practices that ensure mutual trust among team members, managers can nurture the conditions for team success.

- Building a team is incredibly complex, and it is difficult to predict how they will fare over time. Managers can do their part by keeping team size relatively small (between five and nine members is ideal) and taking the personality, preferences, and abilities of team members into account when building the team. Also, managers should match these individual differences to the work to be done, allocating roles to members who are best suited to these individual differences.
- Although team diversity can initially hurt team performance, sometimes teams experience "growing pains" as members learn to interact with one another. As a manager, do your best to support the team during these times, especially if the team will be interacting with one another long-term. These early investments may pay off in a cohesive, synergistic team that can leverage diverse strengths and experiences to meet organizational demands.
- Team leaders play a vital role in creating processes that guide the team toward effective performance. Ensure team leaders establish a common plan and purpose, set aside time to reflect on and adjust this purpose when necessary, make sure team members are "on the same page" in the team (e.g., shared mental models), and appropriately resolve conflict and issues of social loafing when needed. These leaders should also foster a sense of motivation, efficacy, identity, cohesion, and trust in their teams.
- Select individuals who have the interpersonal skills to be effective team players, provide training to develop teamwork skills, and reward individuals for cooperative efforts.
- Do not assume that teams are always needed. When tasks do not benefit from interdependency, individuals may be the better choice.

Team Building Exercises Are a Waste of Time

POINT

It is easy to see why team-building exercises have become so popular. They are usually advertised as exciting or fun activities for the entire office, such as bowling nights or ropes courses, that offer an escape from the office. However, the reality is that these exercises are often extremely costly and do not live up to their goals of building *team* relationships and improving collaboration. Some may be convinced by the enthusiastic testimonials, but in reality, the research indicates that team-building interventions do not have a significant effect on team performance (when conducted in a large-scale and entertainment-centric way). Furthermore, research has found that managers should be more focused on enhancing individual motivation to create effective teams. While strong relationships and trust are essential for collaboration, they are not necessarily the starting point.

Unfortunately, any potential benefits of team-building activities are often short-lived and soon forgotten when employees return to their day-to-day work. While teams can be valuable and necessary, there is such a thing as an overemphasis on collaborative activities. Data from the past decade shows that the time spent by managers and employees involved in collaborative activities has grown by 50 percent or more. Rather than focusing so much time and money on team-building exercises, organizations would be wise to monitor and recognize when collaborative work is needed. By allocating team tasks and purposefully forming teams, they can prevent an overabundance of team tasks that can leave employees feeling burned out and stressed.

COUNTERPOINT

Team-building exercises may have a groan-worthy reputation for many employees, but that does not mean we should do away with them altogether. In fact, they can be quite effective if they are implemented correctly. Team-building exercises have been found to improve team processes and states. Team building is also particularly effective at improving affective outcomes, including trust and team potency (e.g., team self-efficacy—a belief shared by team members that their group can effectively achieve their goals). These exercises are very different than the type of team-based activities that are simply fun, advertised in popular culture. But if only implemented on a one-off basis, they may only lead to temporary improvements in team performance.

Instead, effective team-building exercises focus on the needs relevant to a specific team. Furthermore, they include discussion and experiences that facilitate self-discovery, lead to concrete action plans, and involve accountability for team members meeting the action plans. It also appears that investing in team training that includes improving social support and conflict management can be worthwhile. These improvements can enhance the functioning of a team, which in turn can positively impact the team performance. Thus, companies should devote resources toward properly conducting team-building activities based on needs and that are a part of a continuous team performance management system. In so doing, they may find that they can be valuable in improving team performance and effectiveness.[183]

CHAPTER REVIEW

QUESTIONS FOR REVIEW

10-1 What is the difference between a group and a team?

10-2 What are the five types of team arrangements?

10-3 What conditions or contextual factors determine whether teams are effective?

10-4 How can organizations create effective teams?

10-5 When is work performed by individuals preferred over work performed by teams?

APPLICATION AND EMPLOYABILITY

Teamwork is a pivotal part of the modern workplace. Unlike work groups, teams are meant to create a level of performance greater than the sum of individual efforts. In this chapter, you learned some of the reasons a team may be successful or unsuccessful in meeting this goal based on the team's context and composition, emergent states that direct effort and behavior, and various processes the team goes through. A solid understanding of how to build a strong team and be a valuable team member can help you perform better in any team environment, from virtual to cross-functional teams and beyond. In this chapter, you improved your critical thinking, creativity, collaboration, and leadership skills by learning how to communicate with team members in an eco-conscious way, how to engage in collective mindfulness processes as a team, how to organize groups and teams to advance DEI efforts, and how to debate the utility of team-building exercises. In the following activities, you will further develop these skills, along with your self-management skills, as you critically evaluate which team structure to adopt when building teams following an acquisition of a local start-up, how to respond after being excluded or ostracized on a team, and how to build trust on virtual teams.

EXPERIENTIAL EXERCISE Should You Use Self-Managed Teams?

Break into teams of four or five. Assume you work for a large tech company that has recently acquired a local startup firm with more expertise in a market your company is trying to enter. To utilize employees from the startup fully, you are forming new teams with members from the parent company and the newly acquired firm for your R&D division. Many of the employees from the startup were part of self-managed teams before the company was acquired. You must decide whether to adopt a traditional management style or allow the teams to be self-managed.

Questions

10-6. Answer these questions as a team. What issues could affect the productivity of a self-managed team? Are these issues likely to occur in a team with members from different companies? How could these issues be related to members from a new company? How could these issues be resolved?

10-7. Answer these questions as a team. How would you change, if at all, the reward structure for performance if the team were self-managed? Why?

10-8. Each member of the team should explain what aspects of the team they would allow team members to self-manage if they were a supervisor in this company. Then, as a group, compare your responses. Does everyone agree on what duties and responsibilities should be self-managed, or are there differences? If you could, would you make a team fully self-managed? Why or why not?

ETHICAL DILEMMA When Your Cycling Skills Matter!

Within the Foodtech Industry Landscape, ordering and delivering platforms, marketplaces, and channels have come to the fore. Of particular interest are the case of Deliveroo and Uber Eats and the business model they follow. In the UK marketplace, food delivery is a big market that was elevated to an almost essential service during the COVID-19 pandemic. Many restaurants and takeaways have their in-house delivery service, but they will not always cater to all areas within a given city. Restaurants or takeaways that do not have an in-house delivery service may be at a severe disadvantage against the competition. Deliveroo and Uber Eats offer a solution by providing delivery services for all restaurants and takeaways that subscribe to them, with a wider delivery radius and coverage enabled by their cyclists. These cyclists can deliver food orders to most locations within a city. But how do teamwork and performance figure in the new model?

To begin with, the model is a largely self-managed set-up. Riders are classed as self-employed contractors who are not entitled to protections granted to employees and "workers." They are not entitled to collective bargaining rights. Nevertheless, they are part of a team and of the broader

company's group. They are paid a flat rate for every order they deliver, and they can work flexible hours (with the bonus of keeping their bodies physically fit!). Therefore, the ones who accomplish the most deliveries will get a good day's earnings. It isn't always as simple as that, of course; for instance, the deliveries may be at great distances from each other, reducing the number that can be accomplished over a given period, and the weather can slow down deliveries and thus restrict the earnings of the day for individual cyclists.

Supervision over self-management and self-sustained contractors can be challenging with regard to overall group performance, but the way the reward system works could provide further positive reinforcement for better performance individually and therefore as a unit of a particular group setting. But perhaps the most interesting aspect here is the matter of trust in the working relationships between the cyclists and their supervisor—how these are built and sustained is the big question.[184]

Questions

10-9. Would you consider the Deliveroo and Uber Eats model a work-group or a work-team environment? Justify your answer based on the characteristics of groups and teams.

10-10. What type of group or team are cyclists working for a supervisor for Deliveroo? Justify your answer.

10-11. In the cases discussed above, where do you think you would perform better, and why? Justify your answer by taking into account efficiency factors, reward systems, the context, and your individual perceptions.

CASE INCIDENT Psychological Safety and Team Effectiveness

Anyone who has had to work in a team knows that teamwork and collaboration are not always easy. Simply putting people into groups and giving them autonomy does not necessarily make them an effective team. Because self-directed teams are increasingly being used across different industries, understanding how to improve team effectiveness is crucial. This is especially important for companies whose business relies heavily on such teams and their creativity and innovation—for instance, Google.

Google has sought to foster a collaborative working culture by minimizing organizational hierarchy and bureaucracy, and it strives to attract the best talent by offering various employee benefits like generous leave policies and flexibility, even the opportunity to use 20 percent of their time at work on self-devised projects. Yet in 2012, the senior management team was concerned to find that teams across the organization showed hugely varied levels of performance. To discover the secret of a perfect team, Google launched Project Aristotle, named after a quote attributed to him: "The whole is greater than the sum of its parts." Working with researchers from Harvard Business School, the project team analyzed a huge amount of statistical and interview data, tracking 180 teams of different sizes over a period of two years. They tested a range of factors, including personality traits, interests, educational background, and the role of rewards and incentives.

What they found was that the key factors of successful teams were not about the individuals but the team environment and the processes of working together. The greatest difference to team performance was made by "psychological safety." Initially coined by Amy Edmondson, a professor at Harvard Business School, psychological safety is about creating a safe team environment that allows members to take interpersonal risks. What fosters psychological safety is empathy, encouraging healthy and fair debates, equal opportunity to discuss different opinions, and importantly, ensuring a no-blame culture where team members believe that they would not be punished, rejected, or ridiculed for making mistakes or voicing wrong opinions. Commenting on the results of Project Aristotle, Paul Santagata, the then head of industry at Google, remarked that Google's success is based on a willingness to take risks and to display vulnerability before one's peers. The project identified, among others, four key elements of high-performing teams: dependability within the team, which is about trusting and being able to rely on others; structure and clarity of tasks; standards and expectations; and the meaning and impact of the work that the team is doing.

Of course, while this kind of "perfect team" may work for Google, scholarly debates about what improves team performance continue to rage. In today's global world, it is particularly important for companies to consider whether the same factors of effective teamwork apply in different parts of the world and in different countries—with different cultures within them. While it may seem that the project was done a long time ago, the relevance of its findings, and the emphasis on the importance of psychological safety in particular, was again illuminated after the outbreak of the COVID-19 pandemic. With much work disrupted and employees still dealing with the workplace of the "new normal," psychological safety has become even more important as hybrid or remote teams strive to find ways to work effectively. Understanding what psychological safety would look like in the context of new work and hybrid teams remains an interesting area for current research and an important consideration for most organizations.[185]

Questions

10-12. Why do you think psychological safety was identified as key to increasing team performance? You can draw on your experience of being in a team to illustrate your answer.

10-13. Why do you think teams and organizations sometimes find it difficult to create psychological safety?

10-14. How do you think psychological safety can be improved in teams?

11 Communication



Source: Image Source/Alamy Stock Photo

LEARNING OBJECTIVES

After studying this chapter, you should be able to:

11-1 Describe the types of interpersonal communication.

11-2 Evaluate how to choose communication methods and handle barriers to effective communication.

11-3 Discuss the various forms of virtual communication used in modern organizations.

11-4 Analyze the issues surrounding smartphones, social media, and cybersecurity confronting modern organizations.

11-5 Recognize how to engage in effective cross-cultural communication in organizations.

Employability Skills Matrix (ESM)

	Myth or Science?	An Ethical Choice	Point/ Counterpoint	Toward a Better World	Experiential Exercise	Ethical Dilemma	Case Incident
Critical Thinking & Creativity	✓		✓	✓	✓	✓	✓
Communication	✓	✓			✓	✓	✓
Collaboration	✓	✓	✓		✓		
Self-Management	✓		✓		✓	✓	✓
Social Responsibility		✓		✓		✓	
Leadership		✓	✓	✓	✓		
Career Management			✓			✓	✓

WORKPLACE COMMUNICATION: TOO MUCH OF A GOOD THING?

It wasn't long ago that communicating with colleagues meant gathering around a table for a meeting or chatting next to the water cooler. But times have changed, and the pace of that change has accelerated due to COVID-19. On a typical day, the digital agency Manifesto has only about 20 of its 45 staff in the office. The rest are elsewhere but still working on the same projects, using collaboration tools such as Slack, Trello, Confluence, and Google Drive. Collaborative working is not new, but how it is being done is thanks to readily available, inexpensive, user-friendly tech tools. Even e-mail is becoming passé, with apps like Yammer and Google Hangouts increasing in popularity.

The range of methods of communication available today is almost overwhelming, but is communication itself getting more effective and efficient in modern organizations? Or is there too much of a good thing? Proponents of high-tech business communication tools cite improvements in productivity, idea generation, employee engagement, and speed of decision-making, among many other benefits. But not everyone is convinced. Others claim it creates stress and decreases productivity because of communication overload and constant disruptions and even increases bullying and harassment. Furthermore, these tools may not

have significantly reduced the barriers to effective communication as is commonly believed. In a report by the Economist Intelligence Unit, respondents to a survey said that communication barriers are leading to delays or failures in completion of projects (44 percent), low morale (31 percent), missed performance goals (25 percent), and even lost sales (18 percent).

And what about social media in the workplace? The pros and cons are similar. Properly used, the positives include potential gains in productivity, better employee engagement, a wider audience reach outside the firm, reinforcement of organizational culture, and effective dissemination of the company's vision. When used by senior executives, social media can help communicate the financial and strategic direction of a company, attract potential employees, and retain current ones. Used badly, social media in the workplace can be nothing more than a major distraction, an encouragement to cyberloaf, and a security risk for both the employee and the organization. Consider these two examples:

When a branch manager at an industrial supply company tweeted criticism of the company's choice of holiday gift for the Christmas Season, a barbecue scraper and sauce, he was fired before New Year's Day. When questioned, the company's CEO confirmed that the employee was terminated and said that the company's policy about acceptable standards of conduct is given to every employee and posted on the company website. News of the firing went viral and prompted a backlash on social media, with many customers saying they would no longer buy from the firm.

In another widely publicized case, despite having the highest possible security settings on her Facebook profile, Angela Gibbins was dismissed for gross misconduct from the British Council after publishing an offensive post about Prince George. An employment tribunal upheld the dismissal, finding that she had breached her employer's advice on social media use, that employees should be cautious about what they post even if the message is intended to be private.[1]

Communication is the primary means through which people connect with one another. Communication is not only used to transmit a message or impart meaning—it is also used to bond and forge connections with others. For instance, Shelley Zalis (CEO of The Female Quotient [FQ]) has created The FQ Lounge, which has connected more than 17,500 women in the corporate world.[2] According to Jocelyn Greenky, CEO of Sider Road, this network has enabled women to find their voice and "build circles of trust with one another."[3]

communication The transfer and the understanding of meaning.

It may surprise you that **communication** includes both the *transfer* and the *understanding* of meaning.[4] Communicating is more than merely imparting meaning; that meaning must also be understood. In ideal communication, a thought would be perfectly understood by the person receiving the message

exactly how the sender would have intended. Communication across all contexts, however, is imperfect and less than ideal, with barriers systematically and inevitably curtailing the effectiveness of communication through misunderstanding and other obstacles. As a student of organizational behavior (OB), understanding communication processes and barriers can help you become more aware of how to diagnose communication breakdowns and fix them. In this chapter, we will explore communication in the modern workplace. We will learn more about communication processes and their implications for OB, including virtual communication, knowledge management, cross-cultural communication, and employability.

Interpersonal Communication

11-1 Describe the types of interpersonal communication.

How you approach communicating with others (e.g., using oral, written, nonverbal modes of communication) in organizations can greatly enhance or detract from the way the perceiver reacts to the message. For example, consider a doctor at a hospital in California who informed a 78-year-old man (surrounded by his family) that he was unlikely to survive his illness. You may picture the doctor gently comforting the family of the dying man. However, the family was outraged that the doctor sent a rolling medical assistant robot to deliver the news instead.[5]

Clearly, certain modes are highly preferred for specific types of communication. However, we often do not have control over how we communicate with others, as the stark reality of COVID-19 has taught us. Regardless, we need to think first of the components of effective interpersonal communication and consider oral, written, and nonverbal communication as tools within our communication toolkit—strategically and purposefully focusing on each of these tools when determining how to effectively communicate with others.

Oral Communication

When most of us think of communication, we most likely immediately jump to *oral communication*. We might first think of virtual (e.g., Zoom, Google Voice, or WhatsApp calls) or in-person conversations and discussions we have with others or their more formal counterpart, meetings. We might also think about the speeches our fellow coworkers or leaders give to convey information or motivate us to unite toward accomplishing a common goal.

Synchronicity When we think of oral communication, we often assume *synchronicity*, with both the sender and receiver present, aware, and focused on the communication exchange.[6] The advantages of this **synchronous communication** are speed, feedback, and exchange. Regarding *speed,* we can convey a message and receive a response in minimal time. If the receiver is unsure of the message, rapid *feedback* allows the sender to detect and correct it quickly. The exchange given through oral communication has social, cultural, and emotional components. Social exchange, in which we purposefully share social exchanges that transcend cultural boundaries, can build trust, cooperation, and agreement between individuals and teams.[7] As a part of this exchange, communication partners develop a rhythm and rapport, matching each other's communication styles (even in writing!).[8]

synchronous communication
Communication episodes in which both the sender(s) and receiver(s) are present, aware, and focused on the communication exchange.

However, given the advent of technological advances in communication (which we discuss throughout this chapter), it may surprise you to learn that oral communication can also be **asynchronous communication**, with verbal messages sent and received outside a physically or psychologically present communication exchange.

asynchronous communication
Communication episodes in which messages are received outside a physically or psychologically present communication exchange.

For instance, whenever you check your voicemail, you are engaging in asynchronous oral communication (although many now claim voicemail is "officially dead" and many people no longer rely on it).[9] As another example, many companies and leadership are now filming update messages that are viewed by employees on their own terms. During the COVID-19 pandemic, for instance, Hans Vestberg (Verizon CEO) and Christy Pambianchi (Verizon HR leader) frequently filmed videos where they communicated to employees, company-wide and asynchronously, how the company was addressing the challenges of the pandemic.[10]

Conversations, Discussions, and Listening Regardless of whether we are psychologically and physically present when communicating with others, we should acknowledge that we are usually bad listeners. We are often prone to "listener burnout," in which we tune the other person out, think about what we are going to say next, or rush to offer advice. Sometimes, stressors also lead us to listener burnout more quickly; when we are preoccupied with other things going on in our lives, it is difficult to be fully present in conversations.[11] Not all conversations and discussions are stimulating and energizing as well—people are motivated to avoid conversations that they expect to cause conflict or that infringe upon their privacy.[12]

Conversations and discussions not only have an immediate effect on how people take in and respond to information—they also impact how people store and integrate knowledge and make sense of their environments. For instance, conversations and discussions can influence (for better or worse) our shared mental models and transactive memory systems (see the chapter on teams), which are important for how we work together as dyads, groups, or teams.[13] Conversation is critical to developing these effective systems. It has the potential to make an impact beyond the team context, influencing entire departments and organizations.[14] For example, research on *site visits* of globally distributed teams has shown that they are critical in enabling remote coworkers to familiarize themselves with others styles, personalities, interests, roles, and the cultural context in which they work.[15]

However, it is also a double-edged sword—conversation and discussion can also be wildly ineffective. For instance, they can lead people to recall less important material than if they were thinking about the subject alone (e.g., think of how often you forget to bring something up in a conversation with someone else—even when you have a meeting agenda!), to ignore topics or items that are not brought up during the conversation (e.g., focus too narrowly on only what was discussed in the conversation), and to engage in *audience tuning* (i.e., framing and representing the information to be exchanged in the discussion to the conversation partners), which can turn the attention away from important pieces of information.[16] As an example of audience tuning, a conversation between



Burger King encourages conversations and discussions among its executives. Shown here, from left, are executives Jonathan Fitzpatrick, Jose Tomas, and Daniel Schwartz communicating in their work area at company headquarters in Miami.
Source: C.W. Griffin/Miami Herald/MCT/Newscom

research-and-development executives and a CEO may lead to being enamored with possibilities and the cutting edge: a conversation "tuned toward" development and advancement that possibly ignores logistical and financial obstacles.

A final, major disadvantage of oral communication surfaces whenever a message must pass through several people: the more people, the greater the potential distortion. If you have ever played the game Telephone, you know the problem. Each person interprets the message in their own way. The message's content, when it reaches its destination, is often very different from the original, even when we think the message is simple and straightforward. For example, in product development teams, the engineers may often be so far removed from the customers that they end up building something (often quite well) that does not match the customers' expectations.[17] In these situations, the teams receive communications filtered through a number of layers without ever meeting with the customers themselves—prompting many organizations to turn to engineering teams who can effectively work with clients *and* be savvy engineers.

"Good listeners overcome their natural inclination to fix the other's problems and to keep the conversation brief," said Professor Graham Bodie.[18] **Active listening**—in which we actively engage in sensing and processing others' communication messages (both subtle and overt) and then responding in ways that show we are actively engaged in the conversation—helps us become more present in our oral communication.[19] Research suggests that improving active listening can result in more effective communication. For instance, one study on customer service employees in a Fortune 500 company found that active listening training led these employees to better understand customers' needs and perspectives, increased their sense of self-efficacy and confidence, and reduced their anxieties during difficult customer interactions.[20]

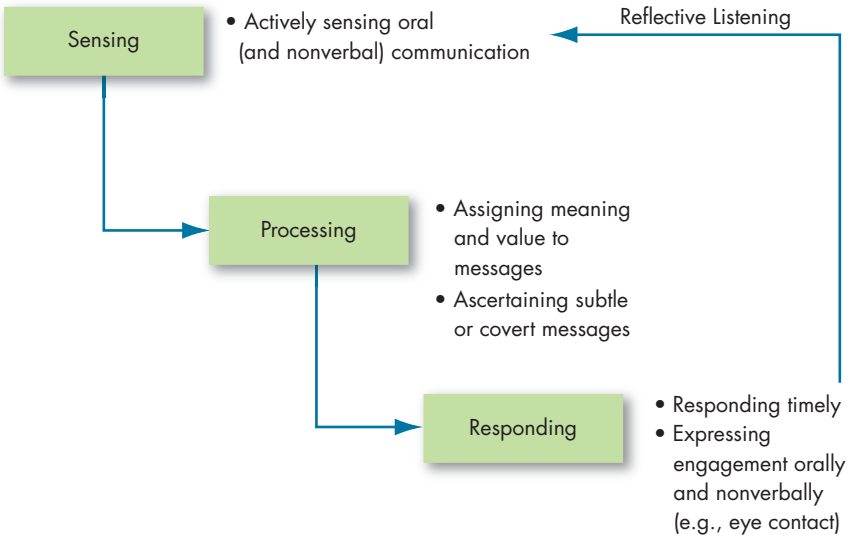
active listening Actively engaging in sensing and processing others' communication messages (both subtle and overt) and then responding in ways that show we are actively engaged in the conversation.

In addition to active listening, **reflective listening** (i.e., acknowledging, restating, or reformulating others' messages to provide nonjudgmental affirmation and encourage them to further elaborate or share) can also help us become better listeners.[21] Reflective listening enables you to show others they have your attention, helps build trust, encourages them to confide in you, and increases the chances you will not miss anything important in the conversation.[22] When conversing with others who hold different opinions than you, showing that you are receptive to their standpoints through reflective listening can dampen potential conflict, lead them to see you as a better collaborator, and increase their intentions to collaborate with you in the future.[23] Although research suggests that reflective listening can be developed through training, merely using it does not always lead to more effective communication.[24] Indeed, reflective listening is a skill and at times an art, when the listener needs to decide when and where it is appropriate to use. For instance, sometimes reflective listening can be as subtle as a nod of encouragement, a "yes, I understand," or an "I see"; sometimes it is as direct as a "Here's what I think you are saying…"[25] Furthermore, it is possible that reflective listening may backfire[26] when we use it too much or inappropriately in a business context. The key is that once it seems clear that both parties have an accurate understanding of the message, the conversation should be moved toward problem solving or setting action items.

reflective listening Acknowledging, restating, or reformulating others' messages to provide nonjudgmental affirmation and encourage them to further elaborate or share.

In Exhibit 11-1, we break down the listening process and demonstrate how active and reflective listening can be employed during the process. By using both, managers and employees may become better listeners. For instance, follow-up questions from active or reflective listeners leads them to be better liked by their conversation partners and seen as more effective leaders.[27] Furthermore, the quality of conversational flow can also lead to improved employability outcomes. Research on job seekers has shown that an ability to maintain a quality conversational flow is linked to networking success, building strong job contact networks, and leading conversational partners to be more interested in forming connections with them.[28]

Exhibit 11-1 Active and Reflective Listening in Oral Communication



Sources: G. D. Bodie, "The Active-Empathic Listening Scale (AELS): Conceptualization and Evidence of Validity Within the Interpersonal Domain," *Communication Quarterly* 59, no. 3 (2011): 277–95; E. Rautalinko and H.-O. Lisper, "Effects of Training Reflective Listening in a Corporate Setting," *Journal of Business and Psychology* 18, no. 3 (2004): 281–99; E. Teng, L. Zhang, and M. Lou, "I Am Talking but Are You Listening? The Effects of Challenge and Hindrance Stressors on Effective Communication," *Human Performance* 33, no. 4 (2020): 241–57.

Meetings Meetings are often thought of as formal discussions or conversations that include two or more people and take place in almost any venue (virtual or in person).[30] Although millions of meetings take place in the United States daily[31] and dozens of hours are spent in meetings on a weekly basis,[32] most people hate them yet begrudgingly acknowledge that they are necessary. Indeed, an Adobe

Myth or Science?

Better Listening Is the Key to Better Working Relationships

Believe it or not, the human brain only takes 0.07 seconds in a conversation to form an initial impression of another person. In other words, we decide whether to trust people we meet extremely quickly. That initial impression then influences how we respond to them. Furthermore, when we sense a potential threat in a conversation, our amygdala (a part of the brain's limbic system) signals our brain to enter protection mode. This process results in the release of several hormones, such as cortisol. When too much cortisol is released, the result may be an inability to engage and connect with others. We are more likely to be emotional and impulsive and are inclined to perceive situations negatively.

However, when we have conversations that encourage cooperation and understanding, a different set of hormones, including oxytocin, are released, reinforcing a bonding experience. When we have these types of conversations, we can build lasting relationships at work. The keys to better conversations and, as a result, better relationships are indeed in the choices we make in the way we listen. Rather than listening evaluatively or with a defensive attitude, the key is listening to connect with the other person. Also important is the element of psychological safety. People need to believe that they will not be punished or humiliated if they make a communication mistake. Although you likely will not find a dedicated course on listening in most business schools, it is an essential skill for leaders and employees. Taking the time to develop our listening skills helps us build relationships with others in the workplace.[29]

study of thousands of workers noted that "wasteful" meetings (58 percent) and unexpected phone meetings (32 percent) were two of the top three factors that "get in the way of your work" while at the same time indicating that they are the most effective forms of communication available.[33] The negative effect of meetings has been amplified by the COVID-19 pandemic, with many employees battling "Zoom fatigue" with seemingly endless virtual meetings throughout the week.[34] So many companies try to make them more effective: Amazon meetings begin with 30 minutes of attendees silently reading their meeting memos and agendas to themselves, Shopify and Asana have "no meeting days," and some organizations limit the duration of meetings.[35] Indeed, research on effective virtual teams suggests that the best teams work in bursts—meeting to coordinate and communicate but then moving toward long periods of uninterrupted "deep work."[36]

Research suggests that several aspects of meetings have implications for OB. For instance, some researchers have framed satisfaction with meetings as a facet of job satisfaction (see the chapter on job attitudes) that contributes to how much people like their jobs overall.[37] The interpersonal dynamics within the meeting are especially important for meeting satisfaction. People can engage in a number of rude behaviors during meetings; nonparticipation (e.g., daydreaming) and inappropriate interpersonal behavior (e.g., disrespecting or making fun of others) especially affect satisfaction with meetings and their perceived effectiveness.[38] Beyond incivility during meetings, they can be draining in other ways. For instance, surface acting (e.g., inauthentically displaying emotions during the meeting that you do not truly feel, like feigning enthusiasm when you really cannot wait for the meeting to end) can cause you to become emotionally exhausted and to consider quitting.[39]

The timeliness of meetings matters quite a bit. When meetings start late, participants' meeting satisfaction and effectiveness perceptions suffer, their creativity during the meetings suffers, and they may even experience relational conflict.[40] Conversely, the meeting may start on time but individual participants themselves may be late. These participants may often be those who are dissatisfied with their jobs and thinking about quitting, or they just might be low on conscientiousness (see the chapter on personality).[41] Regardless, other meeting participants may become angry with these late arrivals and willing to punish them.[42] However, meeting participants are more likely to react with sympathy and support if the latecomer's excuse pointed to something beyond their control.[43]

How can OB contribute to the conversation of how organizations can make meetings more effective? In professor Steven Rogelberg's book *The Surprising Science of Meetings,* he outlines a number of common suggestions to this aim (there are forty-eight outlined in the book in total!), including:[44]

- Only meet when it is truly needed.
- Gather input from attendees prior to meeting.
- Provide an agenda to attendees.
- Delegate roles to attendees.
- Limit distractions.
- Start and end meetings on time.

Speeches Famed Harvard instructor and executive communication coach Carmine Gallo sat across from a famous Silicon Valley CEO who had created technology that revolutionized digital storage memory. Gallo asked this CEO, "You're very successful. You're considered a good speaker. Why do you feel as though you need to improve?" The CEO responded: "I can always get better. Every point up or down in our share price means billions of dollars in our company's valuation. How well I communicate makes a big difference."[45]

Executives, managers, and team leaders alike recognize the importance of speeches in influencing the motivation, perspectives, and understanding of others (often with implications for performance and productivity). As we will learn in the following chapter on leadership, speeches are an important way in which leaders often communicate their "vision" for where they want their company or group to go. Many of us can recall truly impactful speeches, from thought-provoking TED talks from management gurus to the exciting product reveals from black-turtlenecked tech CEOs, and these speeches serve as a form of oral communication that conveys transformational and charismatic leadership.[46] These influential speakers convey power through use of figurative and abstract language,[47] relate on a deeply personal level with their audience, and foster a sense of mystery, discovery, and excitement that prompts listeners to act.[48]

However, speeches are not always bombastic performance acts. They vary in tone depending on the purpose of the communication episode. One group of researchers, for instance, used machine learning approaches to analyze the facial expressions and wording used by sixty-one CEOs in emerging markets to ascertain their communication styles from publicized interviews and speeches.[49] Although some CEOs were reliably more "excitable" and "dramatic" (fitting the profile we discussed earlier), many others were more "stern," "melancholy," or even "rambling." Sometimes, stern or melancholy tones may be more appropriate—such as in the wake of a serious, organizational tragedy. On the other hand, the "rambling" tone tends to be an artifact of the power of leadership, but typically for men. Studies of United States senators, for instance, have found that women are less likely than men to ramble when they have the floor.[50] These women avoid talking for too long as they can experience backlash for doing so. This backlash is an unfortunate result of prejudice and stereotyping.

Written Communication

Written communication includes letters, e-mail, instant messaging, blogs (discussed in the next section), newsletters, and any other method that conveys written words or symbols. Some of these create a digital or physical long-term record, while the advantage of others is quick, fleeting information exchange. Although we may take written communication for granted and may assume it matters less than we think, even small, incidental forms of communication can have a huge impact on, say, employee motivation. For instance, a supervisor's words in a narrative comment in the quarterly performance appraisal of an employee can drastically affect that employee's motivation and fairness perceptions.[51]

Furthermore, we often assume that oral communication reigns supreme as the most effective—however, distributed remote teams can be effective even when they rely almost exclusively on written communication.[52] In these teams, writing helps make the teams' thoughts concrete and specific as well as promotes thoughtful reflection.

In this section, we discuss two primary forms of written communication in modern organizations: e-mail and text/instant messaging. We conclude with a discussion about how *natural language processing* is revolutionizing the way we analyze and make sense of written communication.

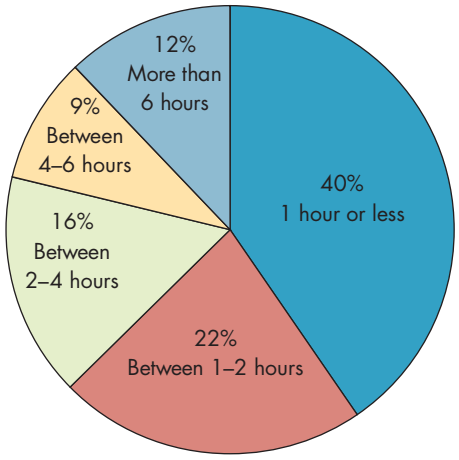
E-mail Since the first e-mail ever was sent nearly fifty years ago, the growth of this written communication mode has been spectacular. Its use is so pervasive that it is hard to imagine life without it. In 2020, there were more than 3.9 billion active e-mail users worldwide (more than half of the world's population) operating 5.6 billion separate accounts,[53] with employees spending an average of three hours every day checking e-mail (roughly 37.5 percent of a forty-hour workweek).[54]

Exhibit 11-2 shows the staggering amounts of time that managers and professionals spend daily checking their e-mail. Poignantly, e-mail has become somewhat of a cultural symbol for stress and overload in the modern work world.[55]

Today, e-mail is so commonplace that it is about equally preferred to actual in-person communication by workers as the most popular form of workplace communication.[56] Despite having become the preferred method of virtual communication, the sheer amount of time employees spend on it inevitably spells trouble for time use, productivity, and performance in organizations.[57] However, e-mail has a relatively complicated relationship with our emotions. Although e-mail interruptions make us *feel bad* because they increase a sense of time pressure and the feeling that we are not meeting our other goals, we also can often *feel good* about being responsive via e-mail, as it may give us a sense of task accomplishment.[58] The question, however, of whether answering e-mail really does amount to task accomplishment is questionable and probably depends on the importance of the e-mail.

Exhibit 11-2 **Time Spent Checking E-mail at Work**

Total number of hours per weekday checking work e-mail



Source: Based on Adobe, *Consumer Email Survey* (San Jose, CA: 2018).

Regardless, excessive e-mails can lead employees and managers alike to feel "boxed in by [their] inbox," leading to a perceived lack of goal progress and less time to fulfill their actual job responsibilities.[59] This is especially of concern for conscientious employees—e-mail interruptions prompting them to complete a new task may lead them to experience strain when they are fully engaged in a separate task.[60] But with all of this effort expended toward keeping up with e-mail, do managers and employees ever reach "inbox-zero" status (e.g., no unaddressed e-mails in the inbox)? Some do, some do not. In 2020, only 55 percent of office workers managed to reach that point, with the vast majority of them experiencing major relief at having done so.[61]

The ubiquity of e-mail has also led to the emergence of newer forms of unethical behavior in organizations. First, employees at Enron engaged in deferent e-mail communications, yielding to superiors' preferences because of the power differential and the fear of "overstepping one's boundaries."[62] Employees are also more willing to lie via e-mail than in person, given that e-mail is seen as a less restrained and personal form of communication than in-person interaction.[63] Employees can also be actively or passively rude to one another via e-mail. When people experience incivility through e-mail, they are more likely to withdraw from their work responsibilities the following week—an effect that also spills over to these employees' significant others, who also withdraw from their own work the following week.[64] Interestingly, passive rudeness may even be more damaging as recipients try to "figure out" and "read into" what the sender meant, leading to insomnia and negative affect at the beginning of the workday.[65] In general, e-mail incivility has a negative effect on employees, leading to negative affect, lowered engagement and energy levels, and performance decrements.[66] However, recovery experiences that allow employees to psychologically detach from work may be one key to addressing the negative effects of e-mail incivility.[67]

Given what we know from OB research, how can we handle this incessant deluge of information? Researchers and practitioners have a number of suggestions to manage your inbox effectively if you are struggling from e-mail overload:[68]

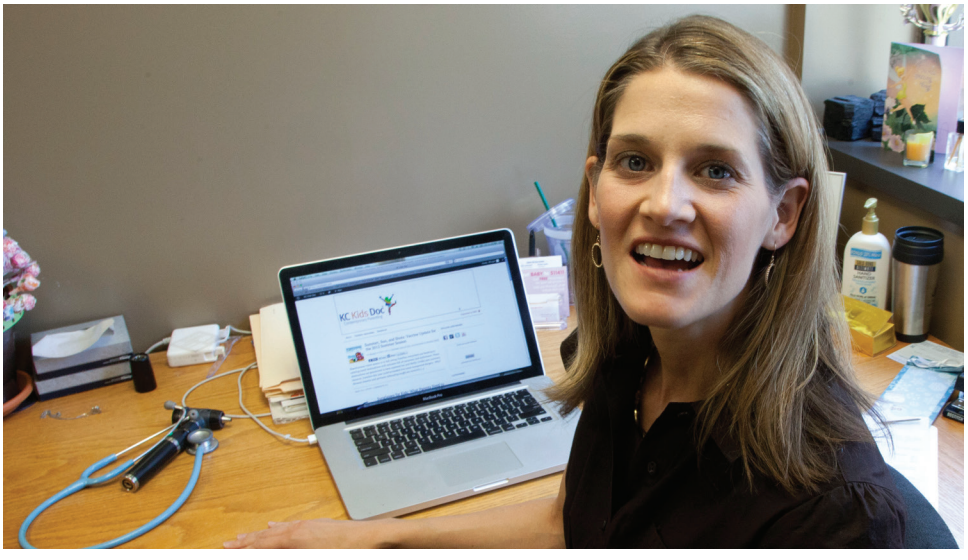
- Turn off notifications.
- Check your e-mail at regular intervals (exact times during the day—for instance, every three hours).
- Immediately move your e-mail out of your inbox after reading.
- Use the search functionality and e-mail filters to find e-mails.
- Use shortcuts to archive e-mails in a small number of categorized folders.

- Single out important e-mails individually; process and treat less important e-mails in groups or batches.
- Use "reply all" thoughtfully and only when all people need to receive your response (to avoid clogging their inboxes).
- Do not treat e-mail like an in-person dialogue.
- Avoid the temptation to skim or skip e-mails.
- Think before you send.

Instant Messaging and Text Messaging Although instant messaging (IM) and text messaging refer to essentially the same activity, there are subtle differences between the two.[69] *Text messaging* is, in some ways, a more reliable form of communication than IM as it is tied to people's wireless and phone services. If the person has a phone (and a plan to support it), they will likely be able to send a text message—with or without Internet connectivity. An *instant message,* on the other hand, involves sending a message through a third-party chat app or system (e.g., Messenger, Teams, Slack). IMs can also be sent through social media networks, where they are also sometimes referred to as *direct messages* (DMs). Initially, IMs and text messages were forecasted to shift our reliance on synchronous, in-person interaction to a more asynchronous, offline experience.[70] However, the use of this messaging took a different trajectory and is much more of a synchronous mode than originally expected.

Unlike e-mail, instant and text messaging have a strong immediacy norm, meaning that recipients are expected to respond to incoming messages quickly and in a brief, conversational manner. This heightened sense of immediacy can increase perceptions of support from organizations, supervisors, and even instructors. For instance, when class instructors permit students to IM them (instead of e-mail them) outside class, they are perceived as friendlier, more approachable, and more available than instructors who are only available via more traditional methods.[71] Internal research at Slack has shown that this immediacy norm may lead to longer times using the app—on average, Slack users spend a whopping *ten hours* a weekday on the application.[72]

In many IM apps, others can see whether you are online, so they can anticipate whether you will respond quickly. Furthermore, "read receipts" have left many to feel the painful sting of being "left on read"—that their message was not important enough or that the recipient did not care enough to send a response after reading.[73] Although the attitudes toward these read receipts vary (some view them as being unnecessary and invasive, others see them as a way to



To enhance her personal office visits with patients, pediatric physician Dr. Natasha Burgert communicates with them through e-mail and texting. Communicating with them through multiple media enables her to share reliable and timely medical information with patients' families so they can provide better care for their children.
Source: Orlin Wagner/AP Images

proactively prompt them to respond more quickly to others),[74] they have certainly amplified the level of immediacy in IMs. Thankfully, those who view read receipts negatively can always turn them off in many messaging apps.

The heightened level of immediacy that comes with texting and IMs can also lead to a heightened level of interruptions. In many ways, they are like super-charged e-mails—requiring you to be psychologically present to answer to others on issues that are often trivial.[75] Also, the brief, conversational, and informal nature of texting and IMs can lead to sloppiness, curtness, negativity, and misunderstanding from recipients.[76] For instance, angry emotions can be conveyed through text messages,[77] which can sometimes reflect the personality traits of the communication partners. People with low levels of agreeableness and emotional stability (see the chapter on personality and individual differences) are more likely to use negative emotion words in texts and IMs, which can affect the emotions and moods of the message recipients.[78] Furthermore, some employees and managers may view texts and IMs as intrusive and distracting, especially when people send messages at unreasonable hours or engage in serial texting in bursts of short messages that keep receivers' phones buzzing annoyingly.

In general, employees should be cautious when relying on text messaging and IM too much. As professor Lucas Miller, a lecturer at Berkeley University, notes, IMs instantly reward us with dopamine any time we get a notification, validating our status as an informed and valued member of our "work tribe." At the same time, each notification leaves us anxious and apprehensive. This is because we fear being ill-informed or out of the loop if we do not check or respond to the notification, even if it does not really require our immediate attention.[79]

Natural Language Processing Data mining and artificial intelligence (AI) approaches to analyzing (and learning from) this data have benefited greatly from written business communication repositories. Through *natural language processing*, researchers can train algorithms to incorporate the actual words people use in e-mail, instant messages, social media, and other written communication media (including hashtags) to measure emotions, moods, personality traits, stress, and other characteristics of employees.[80] The business applications have been nearly endless with companies using natural language processing to better understand the types of products customers may be interested in (and to advertise accordingly), predict customer sentiment and intentions in real time, detect fraud and compliance in accounting, to improve patient experience and diagnostic power in medical contexts, intelligently detect sensitive information (and improve cybersecurity protection efforts), and even create digital assistants to help teams manage tasks.[81] The market outlook has been immense as well: By 2025, the market is said to exceed $6 billion with a growth rate of 21 percent between 2017 and 2025, and the global datasphere (data available for NLP) will grow by a factor of ten, resulting in a trillion gigabytes available for NLP.[82]

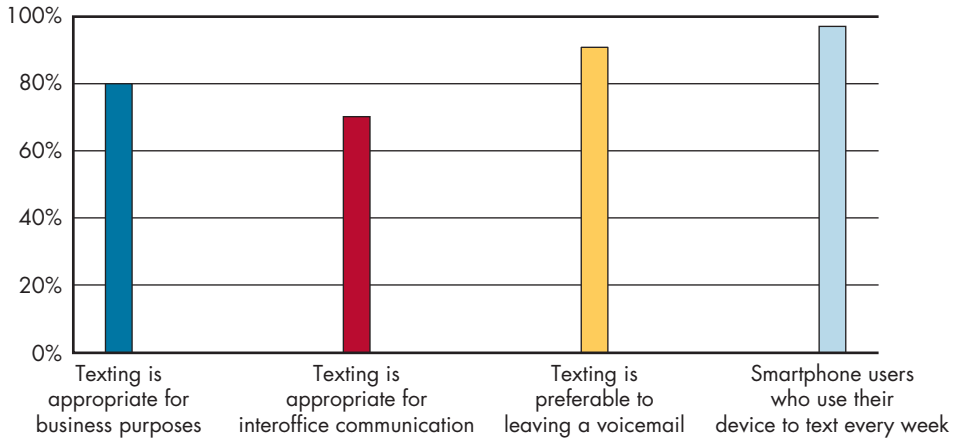
Nonverbal Communication

When we deliver a verbal message, we also impart an unspoken message.[83] Sometimes the nonverbal component may stand alone as a powerful message in and of itself. If you read the minutes of a meeting, you would not grasp the impact of what was said the same way as if you had been there or could see the meeting on video. Why is this so? There is no record of nonverbal communication, and the emphasis given to words or phrases would likely be missing. No discussion of communication would thus be complete without consideration of *nonverbal communication*—which includes body language and movement, information conveyed through contact and our senses, and the physical use of space and time in interactions.[84]

Nonverbal communication can be unconscious and automatic—when events happen, we react and express our emotions, and the bystanders perceiving

OB POLL

Is it appropriate and common to use texting for work purposes?



Source: Based on A.E. Curwen, "Text and E-mails vs. Oral Communication at Work: Which Is Best?," *Society for Human Resource Management*, April 21, 2017, https://www.shrm.org/resourcesandtools/hr-topics/employee-relations/pages/written-versus-oral-communication-.aspx

our emotions then make appraisals based on the emotional expressions.[85] For instance, it may be one subconscious mechanism behind the spread of racial bias in the workplace:[86] In one research study, merely watching videos of White individuals subtly treating Black individuals poorly prompted observers to adopt negative racial stereotypes and form negative impressions of the Black individuals.[87] Furthermore, research has demonstrated that body postures and gestures can also be stereotypical and prejudice-inducing themselves, with certain poses considered more masculine and others more feminine.[88]

Furthermore, the attributions people make about others' nonverbal behaviors are strong and consistent, even when they do not match with reality. For instance, even though people may perceive certain nonverbal behaviors (e.g., standing up straight and posing) as dominant, they do not always match that individual's "actual" dominant personality traits.[89] Eye-tracking studies on project teams found that naive observers who viewed video clips of the teams in action gazed more often (and for longer durations) at the team members who used more dominant gestures and who had active facial expressions (ultimately rating them as more charismatic and emergent leaders).[90]

Body Language and Movement We could argue that every *body movement* has meaning and no movement is accidental (though some are unconscious). We smile to project trustworthiness, uncross our arms to appear approachable, and stand to signal authority.[91] Even something as subtle as a downward head tilt can convey specific personality traits and emotions that observers can reliably pick up on,[92] and people are capable of "acting out" or "posing" the Big Five traits (see the chapter on personality and individual differences) in photographs.[93] Although we often think of specific body movements and facial expressions as unique expressions to be considered on their own, we actually tend to evaluate the entire person's body language as a whole.[94]

Body language can convey status, level of engagement, and emotional state.[95] Body language adds to and often clarifies verbal communication.[96] In fact,

studies indicate that people read much more about another's attitude and emotions from their nonverbal cues than their words! If nonverbal cues conflict with the speaker's verbal message, the cues are sometimes more likely to be believed by the listener.[97] In the workplace, body language plays a key role. Body movement also matters. During a communication episode, our attributions of others' intentions may change over time as they act and react. These dynamic changes in body language and movement over time lead to differences in our perceptions of them.[98] In other words, we do not immediately draw conclusions about others' body language that stick—instead, they are updated and revised over time.

Contact and Senses Although we normally think of body language and movement when we think of nonverbal communication, our other senses play a major role as well. First, sounds and vocal intonations (sometimes called *paralanguage*) could also be considered a sensory form of nonverbal communication that serve as their own form of communication beyond verbal messages.[99] Why do these subtle differences in *how* we say something have a huge impact, even beyond *what* we say? Some researchers suggest that paralanguage serves to persuade and influence others,[100] such as how startup entrepreneurs speak with confidence and conviction to convince a potential client to do business with them despite the entrepreneurs' own reservations about their ability to follow through on the arrangement.[101]

Second, smell and odor are powerful, symbolic forms of nonverbal communication in the workplace that can elicit a number of emotions.[102] A pleasant smell (e.g., a scented humidifier in your office) can put you in a positive, focused state.[103] The scent of coffee from the breakroom can signal that it is the start of a long day (or a long night) at the office.[104] The interesting thing about odor is it is very one-dimensional. People are often not very capable at telling differences between scents, but they can tell you one thing: whether it is pleasant or not.[105] And it is embodied and present throughout our working lives, whether we are working from home or in the office. However, this one-dimensional nature of smell can lead to a number of negative outcomes when the smell is disgusting. For instance, fishy smells coming from others can lead people to become suspicious of those individuals.[106] These black-and-white impacts of smell on our attitudes and behaviors are problematic because smell more often than not has nothing to do with our actual intentions or dispositions.

A final sensory form of nonverbal communication is contact and touch.[107] Touch can help provide support during times of loss and need, communicate warmth and welcoming, and even lead to improved team performance through increases in cooperative intent.[108] Handshaking during job interviews is important for molding and managing impressions.[109] Touch in the workplace is, well, a touchy subject, but it is more common than one would think. Some touch and contact are required in specific occupations (e.g., doctors, personal trainers, hair stylists), and others are normatively appropriate (e.g., tapping someone on the shoulder to ask them a question).[110] However, touching and physical contact at work have become the subject of great scrutiny, with the #MeToo movement highlighting inappropriate touching in the workplace[111] and the COVID-19 pandemic bringing to surface the health risks of physical contact between coworkers.[112] This scrutiny led to the question of whether contact that communicates warmth or intimacy (e.g., hugging) is appropriate in the workplace.[113] In a recent Robert Half survey of managers and professionals, for instance, 65 percent indicated that it is somewhat common to hug coworkers.[114] Regardless, employees and managers need to learn and respect one another's boundaries, and when there is physical contact involved, keep a light brief touch.[115] Moreover, in the wake of the COVID-19 pandemic, other forms of physical contact to replace hugs and handshakes have become more popular (e.g., fist or elbow bumps).[116]

Physical Space and the Use of Time Although relatively new to OB, time and physical space also matter for nonverbal behavior. For instance, how close we stand to other people sends subtle communication signals; that we like and accept them.[117] Research on public school teachers, for instance, found that teachers who took breaks at the same time and taught on the same floor were more likely to develop working relationships with one another, especially when they shared similar interests and characteristics.[118] As another example, research on "coworking spaces" (i.e., where independent workers and entrepreneurs rent space to work and network together in a shared environment) shows that working in close proximity with one another plays a role in forming and maintaining new organizations and ventures.[119] However, sometimes the amount of physical space people maintain between themselves and another person is dependent upon that person's mood and approachability.[120] For example, you might avoid your supervisor when you hear through the grapevine that they are in a clearly bad mood.

Speed comprises an important expression cue, with angry motions typically displayed as jarring and fast, whereas sad motions are depicted as slow and sauntering.[121] Furthermore, people tend to view quicker vocalizations and movements as conveying confidence (leading them to be persuaded more easily), more so than those that are slower and more deliberate.[122] The rapidity and delay with which we communicate with others send messages to our conversation partners. They can communicate that we are prioritizing a certain project or issue, or they could also communicate that we are taking our time to carefully consider an issue.

Overall, we need to be deliberate and strategic in our management of nonverbal communications with others. We should look for these cues in others' behavior and be mindful of our own nonverbal behavior when interacting with clients, coworkers, subordinates, and supervisors. You should be particularly aware of contradictions between the messages. Someone who frequently glances at their wristwatch is giving the message that they would prefer to terminate the conversation, even if they tell you otherwise. We misinform others when we express one message verbally, such as trust, but nonverbally communicate a contradictory message that reads, "I do not have confidence in you." It is better to align all forms of communication so that we are more direct in what we mean and intend (e.g., "I do not have time to continue the conversation now as I might be late to a meeting—can we pick this up later?")

Choosing Communication Methods

11-2 Evaluate how to choose communication methods and handle barriers to effective communication.

The choice of whether to schedule a meeting or a phone chat or send an e-mail or a text is a complicated one. In this section, we describe how to match the communication method to the content of the message and how to deal with potential barriers to effective communication.

Choosing Communication Methods

Many claim face-time with coworkers, clients, and upper management is the key to success. However, if you seek out the CEO just to say hello, you may be remembered as an annoyance rather than a star, and signing up for every meeting on the calendar to increase your in-person presence is counterproductive to getting your work done. Your communication choice is worth a moment's thought: Is the message you need to communicate better suited to a discussion? A text message? After determining what the norms and guidelines are in your organization, it might be helpful to match the message to the method. Exhibit 11-3 presents a guide for choosing a communication method in this way.

Exhibit 11-3 Guide to Choosing Communication Methods

In-person or virtual meetings *are appropriate when…*	
	You need to set structure, assumptions, or expectations for the entire team on a certain issue.
	You need to evaluate as a group obstacles or hurdles that may come up in an upcoming task.
	You need to discuss an issue that will involve others' emotions or convey feelings that could be misinterpreted.
	You need to discuss conflict, performance goals and milestones, or behavioral issues.
	You need to collaborate in a way that will require a back-and-forth exchange of information.
	You need to gauge the receptivity to an idea, persuade others about the utility of the idea, and work toward making the idea better.
Phone calls *are appropriate when…*	
	You need something done or answered in the next thirty minutes (during working hours, unless it is absolutely critical).
	Your question or idea requires a lot of verbal explanation.
	Your message needs to be carefully conveyed, but certain obstacles present you from managing impressions effectively in person (e.g., under emotional labor).
Texts or instant messages *are appropriate when…*	
	You need to share a thought on a task that has already been started.
	You have a quick, noncritical question multiple people are capable of answering.
	You have ***brief, additional*** information (e.g., "by the ways" or "for your information") you need to notify your team about.
	You are sharing information (e.g., a document or link) that multiple people need to collaborate or work on in real time.
	You are asking whether another person is available for an in-person or phone meeting.
E-mails *are appropriate for when…*	
	You need to relay a message to multiple people on your team.
	You need to confirm expectations or get on the same page after a meeting.
	You are sharing confidential information or formal documentation.
	You are giving your official approval or endorsement on a plan or decision.
	You are outlining procedures, strategies, or steps others need to follow.

Source: Based on C. D. Ellis, "Stop. Does That Message Really Need to Be an Email?" *Harvard Business Review,* March 30, 2021, https://hbr.org/2021/03/stop-does-that-message-really-need-to-be-an-email; see also A. Brodsky, "Virtual Surface Acting in Workplace Interactions: Choosing the Best Technology to Fit the Task," *Journal of Applied Psychology* 106, no. 5 (2021): 714–33.

Handling Barriers to Effective Communication

Several barriers can slow or distort effective communication. In this section, we highlight three of the most important barriers to effective communication: information overload, communication apprehension, and crisis situations.

Information Overload Although people integrate information from multiple sources to effectively make sense of information,[123] individuals have a finite capacity for processing data. When the information we must work with exceeds our processing capacity, the result is **information overload**. What happens when individuals have more information than they can sort and use? They tend to select, ignore, pass over, or forget it. Or they may put off further processing until the overload situation ends. In any case, lost information and less effective communication result, making it more important to deal with overload proactively. For instance, information overload may cause negotiators to give up on the deal more quickly or otherwise jump to conclusions about optimal offers.[124] Furthermore, the pressure to interact with multiple people simultaneously (i.e., sometimes referred to as *multicommunication*) can cause people to be inadvertently rude with one another, a situation that can quickly spiral out of control.[125]

information overload A condition in which information inflow exceeds an individual's processing capacity.

But does everyone feel this way? Surprisingly, research over the past several decades suggests that most people actually *like* being overloaded with information on a daily basis. Between 2006 and 2016, for instance, the number of people who felt information overload decreased from 27 to 20 percent. On the other hand, the number of people who like "so much information" increased from 67 to 77 percent.[126] Why do people feel this way? This comfort with information overload is primarily attributable to the rise in smart gadgets and devices (discussed later in the chapter) that people use to manage large amounts of information. They feel that these devices enable them to keep up with demands, determine what information to trust more quickly, and have control over their lives.[127] Who might the "information overloaded" be, then? Some research suggests that the differences might be attributable to socioeconomic status. Not everyone has access to smart technology (e.g., smartphones, smarthomes, digital assistants, tablets, and broadband Internet).[128]

Managers should consider these disparities in setting communication norms in their work groups and teams: Providing technological support and equal access to devices can help forge units better equipped to manage large amounts of information. Virtual team leaders can also take a structured approach to reducing information overload by developing individual and team situation awareness (i.e., an individual and collective understanding of the information to focus on and prioritize in communication), along with a plan for acting on this awareness.[129] If you are concerned with information overload in your communications, try to reduce the ambiguity and complexity and increase the relevance of what you are trying to communicate to others, as these three characteristics are most strongly related to information overload.[130] If you do feel like you are experiencing information overload (and are not liking how you feel), it may make sense to connect to technology less frequently or at specified time intervals to avoid feeling overwhelmed, as we described earlier.[131]

Communication Apprehension One barrier to effective communication, **communication apprehension**, results when people experience undue tension or anxiety surrounding their communication with others.[133] They may find it difficult to talk with others or become extremely anxious, relying on their preferred form of communication (or otherwise abstaining from communication) when a different method may have been more appropriate. Sometimes, communication apprehension stems more from reluctance to use *new media*, or forms of communication or communication media that one is not familiar with.

communication apprehension Undue tension and anxiety about communication.

Communication apprehension has a number of implications to effective communication in organizational contexts. For one, it can affect leadership emergence in virtual teams. For example, one study found that communication apprehension reduced the amount of electronic communication that a person engaged in and, as a consequence, the extent to which that person emerged as a team leader in the eyes of other team members.[134] Communication apprehension can also be more or less salient at different times during a person's career. Applicants to jobs that require communication with others (e.g., role-play exercises, giving presentations, group interviews) may experience communication anxiety that may affect the personality attributions interviewers make and their overall communication skills scores.[135] As another example, new employees may be all too familiar with the nervousness and anxiety surrounding communicating with a new supervisor.[136] After all, you want to make a great impression!

Learning to regulate and cope with one's anxiety's about communication may be one potential solution. As Theresa Welbourne, professor at the University of Alabama's Culverhouse College of Business, wrote about apprehension concerning new media: "This may be a new place for courage to play out in organizations. Leaders, managers, and HR need to be courageous and take a leap of faith that they will benefit from new media if they plunge into the process."[137]

Communicating in Times of Crisis The final barrier to effective communication can be found in the underlying context: Communication becomes more challenging during times of crisis.[138] As an example, the devastation of Hurricane Katrina in August 2005 has been frequently viewed as an exemplary case in how crises can be fraught with ineffective and inefficient communication.[139] Government agencies at all levels were taken by surprise when confronted with the threat of Hurricane Katrina approaching the United States and had difficulty coordinating a response to the crisis as well as coping with the uncertainty and ambiguity of the situation.

Effective communication during times of crisis involves breaking down crisis response into several stages: (1) communicating in anticipation of or preparation for crises, (2) managing responses to the crises while they are occurring, and (3) communicating with stakeholders after the crisis and catalyzing shared learning.[140] Collective motivations underlying communication change throughout these stages: People become driven to take control and dominate during times of war, whereas crises during times of peace tend to drive people toward being self-critical and fearing negative consequences.[141] These shifting motivations need to be accounted for in crisis communication—control, domination, anxiety, and fear are not directly aligned with reassurance and grace under pressure.

What can be done to improve communication during times of crisis? Effective messaging that focuses on sharing facts, interpretations of the facts, and projections for consequences of actions at all stages can be beneficial.[142] Furthermore, although motivations tend to shift more toward power and responsibility, people should try to work together in times of crisis instead of independently. For example, research shows that people, when trying to solve a problem separately (e.g., developing a vaccine for a virus), may become overcome by confusion and an inability to learn from one another's failures—by coordinating and collaborating, they may be able to overcome the confusion and learn from one another.[143] Finally, technology can help communicate information rapidly and accurately to all those who may be (imminently) affected by a disaster, including apps that help provide information quickly to response teams.[144] Technology can also be used to sound the crisis alarm: For instance, a Twitter alert was issued in 2018 for a potential ballistic missile

Toward a Better World

Mobile Citizen and Mobile Beacon: Two Companies Enhancing Access to Smartphones and the Internet

Today, access to the Internet (and, perhaps, constant access to the Internet through smartphones) has become a public necessity. For many people, not accessing the Internet for an entire day would be incredibly disruptive to their personal and professional lives. This realization is all the more compelling when we think of global crises such as the COVID-19 pandemic. Many people found themselves in government- or self-imposed quarantine, unable to venture outside their living spaces. The only lifeline to the rest of the world came from their devices and the Internet.

Moreover, many relied on their Internet-connected devices for their children to continue to learn. Without these devices, the students would likely fall behind or otherwise not stay on pace in their learning progress. Not to mention the medical implications: Many during the pandemic relied on the Internet and smartphones to communicate with their doctors, therapists, and healthcare providers. (In fact, 75 percent of psychologists stopped seeing their patients in-person entirely.)

These realizations have sparked a renewed interest in a debate surrounding the Internet: Is Internet access a *right*? Or is it a *privilege*? Furthermore, what are the roles of the government and organizations in providing Internet access? In many societies, Internet access is commoditized through companies that manufacture smart devices (e.g., Apple, Samsung, Xiaomi) and Internet access providers (e.g., AT&T, Verizon, CenturyLink). However, another set of organizations (e.g., libraries, nonprofits) have come together with the mission of increasing or providing complementary or discounted Internet access to those in need (e.g., lower-income employees and their families). These organizations (e.g., Mobile Citizen, Mobile Beacon) provide the same services and technology at a cost that is often up to 80 percent less per year than popular commercial carriers. Some examples of these companies' programs include the Ashbury Senior Community Computer Center, which addresses older, limited-income adults' needs with technology access and training. Furthermore, St. Paul's "PCs for People" provides tech support, computers, and Internet access to low-income Minnesotan families.

The case behind this social mission is compelling. As one rural Florida school teacher noted: "About 21 percent of our students do not have Internet access at home. My students rely on [Mobile Beacon] to continue their schoolwork after our library closes, do research online, access school resources, or even submit assignments. Our community is very rural, and there are no free wifi options." Enhanced Internet access also assists employees with disabilities—as one employee in California noted, "I would not have access to the outside world to do my essentials that healthy people take for granted. This affordable service fits in my budget because my disability check doesn't stretch very far." Finally, the head of Reference Services at Chicago Area Public Library noted that the services have "become one of our most important programs. Patrons rely on it to access information from home: for school work, continuing education, job searching, or just general Internet use. The hotspots connect our members to the world around them." The statistics are even more compelling. Thirty-four million Americans *do not have* access to the Internet. Forty percent of nonprofits do not have the technology they need to do their jobs. About 50 percent of libraries do not offer sufficient Internet access.

Despite these companies stepping in to provide increased access and services to those who need them, there is a more extensive ethical conversation at play. Should Internet access be a *public utility*? Considerations of feasibility will likely inform the answer to this question. Many note that the private infrastructure is unreliable and crumbling and question whether public infrastructure would be an improvement. Others suggest that the current state of Internet service providers is exceptionally messy and unsystematic. A uniform system would help reach more people and clearly define who is "served" versus "underserved" (which also varies across regions).

Many communities around the United States (more than 500) have experimented with these ideas, building their own publicly owned Internet networks that many view as cheaper, faster, and more transparent than commercial organizations. A good example is Chattanooga, Tennessee. Its high-speed fiber-optic network (built in 2009 and run by the "Electric Power Board" [EPB]) is consistently ranked as one of the best Internet service providers in the United States. Many even comment that it is the fastest Internet service in the entire country, with speeds up to *ten gigs per second*. Regardless, we believe these issues will become more salient in the years to come and highlight how organizations (both private and public) can address societal needs.[132]

threat. However, this alert proved to be a false alarm, and an analysis of the 1.2 million tweets that followed suggested that anxiety remained heightened throughout the week as a result.[145] Therefore, people should remain sensitive to the impact of their communications on people during crises.

Advancements in Virtual Communication

11-3 Discuss the various forms of virtual communication used in modern organizations.

With innovations in technology, there have also been advances in the ways in which we communicate with one another virtually. This has resulted in a number of virtual channels that differ in their capacity to convey information.[146] Some are *rich* in that they can (1) handle multiple cues simultaneously, (2) facilitate rapid feedback, and (3) be very personal. Others are *lean* in that they score low on these factors. As Exhibit 11-4 illustrates, in-person conversation scores highest in **channel richness** because it transmits the most information per communication episode—multiple information cues (words, postures, facial expressions, gestures, intonations), immediate feedback (both verbal and nonverbal), and the personal touch of being present. Impersonal written media such as formal reports and bulletins rate lowest in richness.

channel richness The amount of information that can be transmitted during a communication episode.

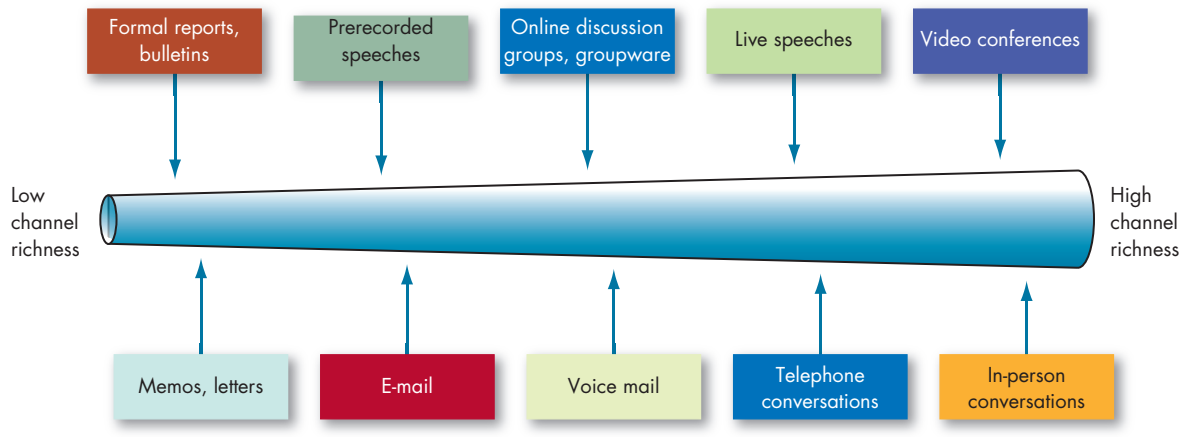
In sum, "media-rich" channels give us multiple opportunities to observe. The unconscious aspects of communication help us understand the full meaning of a message. When these aspects are missing, we must look for other clues to deduce the sender's emotions and attitudes.

New virtual communication media are, for the most part high-channel "media rich" and include videoconferencing, blogging, vlogging, and podcasting as well as forms of e-collaboration and e-learning.

Videoconferencing

The COVID-19 pandemic has led to an unprecedented number of people downloading videoconferencing software and applications. In March 2020 (the onset of the pandemic in the United States), there were a record 62 million downloads of platforms like Google Hangouts Meet, Zoom, and Microsoft Teams (up a whopping 90 percent from the pre-COVID average).[147] But even

Exhibit 11-4 Information Richness and Communication Channels



Source: Reproduced from R. L. Daft and R. A. Noe, *Organizational Behavior* (Fort Worth, TX: Harcourt, 2001), 311.

before the pandemic, videoconferencing was on its way to becoming an institution. For instance, in a 2017 Forbes Insights survey, 80 to 84 percent of respondents said that videoconferencing is the norm for meeting both internally and with customers.[148] Videoconferencing permits employees and clients to conduct real-time meetings with people at different locations. Live audio and video images let us see, hear, and talk with each other without being physically in the same location. People can also share files or videos with others and broadcast these documents through "screen sharing," which enables everyone to see the files on their own devices.

Videoconferencing boasts a number of benefits for team members and the organizations that use the technology. For instance, a number of employees surveyed by a videoconferencing company have been able to reduce their business travel, become more engaged in their jobs, and view their employers as innovative and successful as a result of their use of videoconferencing.[149] As Srini Koushik, chief technology officer (CTO) at Magellan Health, put it, videoconferencing "is helping us to build teams across geographies, build a sense of community, provide the ability to train many people at the same time, host town halls—and much more… it's my belief that video conferencing is one of the first things you need to get right for effective collaboration."[150]

Despite the increased popularity of videoconferencing, it is clearly not the same as an in-person meeting. But frankly, many do not have the choice over whether to meet in person or via videoconferencing. Teams and employees are becoming more and more distributed across the globe, and it appears videoconferencing is here to stay.[151] What can employees and manager do to leverage videoconferencing more effectively? Experts offer the following suggestions:[152]

1. **Be mindful of your nonverbal behavior, just as you would in person.** Try to look directly into the camera and make eye contact, lean in, nod, and do what you can to show you are engaged in the conversation (but try not to overdo it). Avoid yawning, stretching, eating, or other distracting movements.
2. **Set the stage.** Adjust your background to keep the focus on you and away from distractions. Some may choose to use backgrounds that block out background movement and make it easier to focus. Position the webcam so it focuses directly on you and not in a way where people cannot directly see you talking. Ensure that the lighting is warm and soft enough for people to see you and not too jarring.
3. **Be aware of the other people on the call.** Although it may feel like you are alone in your own space, it is helpful to be mindful of the other people on the call and leave them space and opportunities to share. Sometimes you may experience awkward silence, but resist the temptation to jump in and start talking more. Relatedly, keep tabs on how long you have been speaking and meeting so you are respectful of others' time.
4. **Leverage (but be sure to test) technology.** Videoconferencing offers a number of tools and utilities that can effectively enhance collaboration. For instance, the "raise hand" function offered in some platforms can enable presentations and larger discussions to be held online. Other callers can "raise their hand" to signal they have a question or comment. Reaction tools can be used to encourage and provide feedback to other attendees. The chat window and screen sharing functions can be used to share other media or references to drive home the points you are trying to make during the call. Finally, it is a good idea to test and practice ahead of time—not only make sure that the videoconferencing system works, but also test its features.
5. **Manage videoconferencing (e.g., Zoom) fatigue.** Videoconferencing may be stressful and intense at times. (It is not the same as in-person communication, after all.) Some solutions may be to minimize your window so that the other

people on the call are not dominating the entirety of your screen. Furthermore, constantly monitoring yourself in the "self-view" can be draining. If the application provides the option, consider hiding the self-view to avoid the temptation of looking at yourself. A bonus to doing so is that you are more likely to focus on others and maintain nonverbal eye contact more effectively.

6. **Play with innovative videoconferencing applications.** We typically view videoconferencing as a tool purely for replacing in-person meetings. However, their potential applications go so much further than that. Depending upon your objectives, you may want to use videoconferencing software for virtual social events (e.g., coffee breaks, happy hours), virtual coworking (e.g., working quietly alongside other coworkers on the same project), virtual office hours (e.g., setting aside time to welcome impromptu discussions or chats with coworkers).

Blogging, Vlogging, and Podcasting

Although many people monetize blogs, vlogs, and podcasts as solo entrepreneurs,[153] organizations are also hopping onto this trend and starting their own with the hope of connecting and engaging with their audiences. In all three cases, increased access to what was once prohibitively expensive audiovisual equipment has enabled them to spread like wildfire.

A *blog* (short for "web log") is a website by a single person, team, or company that is used to share primarily written content with others and engage them. Blogging may very well be a business necessity for organizations, so it should not be overlooked as a vital form of communication.[154] As an excellent example of a company that gets blogs right, Intuit QuickBooks, an accounting software used for expense tracking and payroll, has a well-organized blog with free resources people can use to help them run their businesses.[155] The key to successful blogging is engagement and to make your content *searchable*. This means that people looking for advice on how to run their businesses will likely be drawn to the content on the blog—while they are there, Intuit might attract new customers or at least pique their interest.

Blogging has given way to *vlogging*, which serves essentially the same functions as a blog, but through a different medium: video. Vlogs are especially useful to connect with customers and clients if your products are used in projects (e.g., construction, art), require step-by-step instruction, or sometimes require proficiency to use properly. For instance, if your company sells tools, you might upload videos on how to use the tools properly. As a great example of a company with thousands of viewers of its vlog, the magazine *Bon Appétit* continuously updates its vlog with extremely relatable chefs making recipes from their home and test kitchens.[156] As some viewers described, it is almost like a sitcom with a revolving cast of characters: "And so, each night before bed, I check in with the chefs at Bon Appétit like I'm catching up with old friends, watching (or let's face it, rewatching) video after video until I pass out. This is comfort food to me."[157]

Finally, *podcasts* resemble mini-radio shows, with people sharing primarily audio content to serve the same function as a written blog, but with more emphasis on in-depth discussion and storytelling. The past decade has led to a number of truly innovative ways that organizations have sought to inform and connect with audiences. For instance, John Deere's "On Life and Land" discusses sustainability, food, farming, and field recordings to really showcase its love of the land.[158] Trader Joe's "Inside Trader Joe's" unpacks life "behind the scenes" at the grocery chain and how the company makes decisions behind the products it stocks and its sourcing.[159] This podcast really enables listeners to delve into the many products that have since garnered a cult following. As a final example, #LIPSTORIES, a podcast by Girlboss and Sephora, showcases inspirational women creatives, thought leaders, entertainers, and entrepreneurs, giving them an opportunity to tell their memorable stories to listeners.[160]

E-collaboration and E-learning

As a final category of communication medium, we turn toward *e-collaboration* and *e-learning*.[161] These media essentially build upon corporate social media approaches (like the enterprise social software described later),[162] but rather than being solely devoted to social networking, these media are literal platforms through which employees do their work or train to do their work. Although e-learning management systems are more common in schools and universities (think Blackboard, Moodle, Google Classroom) or outside schools as *massive open online courses* (MOOCs),[163] many businesses and millions of employees today use e-collaboration software, like Microsoft Teams, Google Workspace, and Facebook Workplace. All of these systems allow users to create and share content; accomplish work tasks; manage projects, goals, and timelines; organize as teams; and communicate with one another.[164] As an example, Optum Healthcare engages its customer care employees in an e-collaboration network to crowdsource innovative ideas on how to improve internal processes and change benefits packages so they are more attractive to clients.[165]

Although these technologies are cutting edge and are just now being implemented across major enterprises, decades of OB research have been devoted to e-collaboration and e-learning. Are they as effective as in-person collaboration and training? With regard to e-collaboration, there are quite a few "moving parts." For one, e-collaboration has implications for how leaders manage and influence their followers over time and space.[166] In online collaboration, leadership often becomes more salient due to the lack of in-person physical cues. For example, the effect of leader-member exchange (LMX; see the next chapter on leadership) becomes more important for empowering followers (and resultantly for team processes) than it would be in person.[167] Second, research demonstrates that there are a number of qualifications (e.g., motivation, knowledge, attentiveness, and composure) virtual team members need to effectively "e-collaborate."[168] Third, e-collaboration systems should be monitored to ensure that employees are communicating frequently and engaging in quality exchanges with one another.[169]

E-learning research suggests that its effectiveness depends on how well the systems are designed, with most research showing it can be equally effective with the right conditions in place (e.g., autonomy, collaboration, feedback).[170] Autonomy is especially important in *blended formats* (i.e., learning that is partly in person, partly online), suggesting that people have little control over which parts are in person versus online and little personalization regarding the in-person aspects.[171] However, these blended formats have proven to be fairly effective, with people outperforming those learning in person, especially when they are provided with feedback and opportunities for collaboration.[172]

The Currency of Virtual Communication: Emojis, Usernames, Selfies, and More

The rise of virtual communication has transformed the ways in which we communicate with one another. From emojis to memes to expressing ourselves with usernames and selfies, a new "language" for communicating has developed within the span of decades.[173] Indeed, research shows that people tend to prefer to communicate in "pictures" rather than "words" when separated by time and distance.[174] Perhaps this explains why we are shifting toward using emojis, memes, and gifs as communication? However, there are individual differences in the use of emojis. For instance, one study of over eighty-five thousand Facebook users found that 90 percent of these users regularly communicated with emojis, but young, women, and extroverted users tended to use them more than others.[175] Furthermore, although they are used by just about everyone, you may want to

exercise caution in using emojis in work contexts, at least when you are making a first impression. For example, a recent study suggested that using smiley emojis in a first impression can lead others to view the user as less competent and to be less willing to share information with them.[176] It might be best to test the waters first and follow the norms of the people with whom you are interacting.

Outside of emojis, abbreviations (e.g., *LOL*), memes, and gifs, people also communicate online in the ways they represent themselves. For instance, people's usernames may often reflect the personality they want to portray to the world, but they might not be as accurate as we may think. Researchers studied thousands of players of a popular massively multiplayer online role-playing game (MMORPG) and found that although people were consistent in rating what players' usernames were intending to portray (in terms of Big Five personality traits), these usernames were highly inaccurate windows into players' true personalities.[177] Second, people also use selfies to communicate online. Unlike usernames, people *were fairly accurate* in their ratings of others' personalities when viewing their selfies, although less so for agreeableness and their general self-esteem.[178] But who posts selfies more often, and how do others react to them? In general, extroverted individuals are more likely to post selfies than the other Big Five personality traits.[179] However, it is probably best not to overdo it—for instance, one study found that Instagram users who posted selfies more often were rated more negatively (e.g., less successful) than those who were more judicious.[180]

Smartphones, Social Media, and Cybersecurity

11-4 Analyze the issues surrounding smartphones, social media, and cybersecurity confronting modern organizations.

Virtual communication has permeated into (and practically dominated) the ways in which people connect with one another at work.[181] An estimated 3.5 billion people use social media (about 45 percent of the world's population), 68 percent of U.S. adults use Facebook to connect with others, and the average adult spends three hours on social media, primarily using mobile devices like smartphones.[182] Combined with our earlier estimate on e-mail, this equates to *six hours daily* checking e-mail and social media. Worldwide, over 2.5 billion people own smartphones,[183] with about 81 percent of Americans owning smartphones.[184]

The vast number of people using smartphones, engaging with social media, and communicating through virtual means has led to a number of effects on the way people do work. For instance, new norms surrounding technology use and boundaries between work and home life are just one example of the ways in which technology has led to transformation (and subsequent conflict and stress at home).[185] Furthermore, the psychological distance fostered by virtual forms of communication can lead us to figuratively perceive others on virtual teams as more abstract, less concrete, and "farther away" than if they were sitting across from us in an open-office.[186] But despite this psychological distance, many younger employees are *digital natives*—they have grown up with all of this technology and are used to interacting with and even receiving emotional support through technology.[187] These and other issues point to technology-aided communication in OB as a revolution of sorts[188]—a major change in how we communicate with one another since the turn of the millennium.

In the sections that follow, we describe how smartphones, social media, and virtual communication have affected OB. Furthermore, we describe an emerging issue that has resulted from these advancements, cybersecurity, and what organizations are doing to address it.

Smartphones (and Other Smart Devices)

Smartphones are now used by a vast majority of workers and managers in organizations. Although some organizations actually employ their own "fleet" of devices they loan to employees for work purposes, many organizations that encourage smartphone collaboration follow a "bring-your-own-device" (BYOD) model, with employees using their personal devices for work purposes. Smartphones have led to a number of advancements in the study of OB. For instance, they can be used to capture information about situations and contexts, uncover communication dynamics between people, determine how people feel in different locations, uncover differences between day and night work behavior, and even sense people's personalities.[189] Much of the research in OB on smartphones has focused on their impact on stress, health, and well-being. In the following sections, we go into more depth on this topic and conclude with other "smart devices" that will likely play a larger role in the future workplace.

Smartphones and Stress, Health, and Well-Being Smartphones have enabled people to connect with colleagues and perform relational work from just about anywhere. However, with this increased connectedness come increased threats to employee health and well-being. This situation has resulted in a paradox of sorts—although people report that the increased connection gives them a deeper sense of autonomy, that they can control when and where they work, they end up using it everywhere and all of the time, which actually strips them of autonomy.[190]

Furthermore, the temptation and distraction of constant connectedness have led people to, paradoxically, enjoy in-person interactions less than they would without smartphones.[191] In fact, one study tracking over a million high school students over twenty-five years found that, following the rise of smartphone technology in 2012, the happiness and well-being of high schoolers decreased steadily over time and that this decrease was not due to the Great Recession.[192] Many theorists suggest that this is an example of *technoference*, or the ways in which technology interferes with, rather than assists, our lives. For instance, they suggest that humans are evolutionarily incompatible with smartphones as they draw our attention away from developing meaningful attachments with others.[193] However, as we noted earlier, it is not out of the question for humans to adapt as digital natives, who forge connections with one another electronically. For instance, some evidence suggests that using smartphones has caused many to think more abstractly about their work, putting in the work to integrate the technology into the various roles they play and explore ways to make the situation work for them.[194]

If we want to fully examine the effect of smartphones during the typical workday, we should start with the morning. Research suggests that late-night smartphone use can cause employees to start the workday already depleted and less engaged because it interferes with their sleep.[195] During the day, research suggests that work engagement can reduce the extent to which workers bring work home with them, thus reducing smartphone use outside working hours.[196] Finally, smartphone usage can inhibit employees from engaging in the replenishing recovery activities they need to reduce strain at the end of the day.[197] What can we do to limit the extent to which smartphones interfere with our livelihood? One large footwear manufacturer uncovered that by permitting employees to communicate in the ways they desired and developing norms that are work-life-balance friendly, organizations may "avoid the trap of constant connectivity."[198]

Other Smart Devices Beyond smartphones, a new frontier in OB research revolves around *smart-homes* and *digital assistants* (e.g., Alexa, Siri), which are voice-activated AI that are integrated with other devices in one's

environment. These devices can theoretically be employed in the work and home contexts to manage and accomplish one's work.[199] Another advancement that has not been picked up by many organizations (but that shows promise) is the use of *wearable digital devices and sensors* (e.g., Fitbits, smart watches).[200] For instance, Bluetooth-enabled devices can help keep track of team performance and individual performance in real time so employees can seamlessly provide assistance to one another when needed (without having to ask for help).[201]

Social Media

Nowhere has online communication been more transformed than in the rise of social media. For decades, businesses have been coming to grips with the reality of social media—not merely to cope with it but rather to leverage it as a part of their strategy. Although we will discuss the use of social media in HR applications in a later chapter, businesses are taking advantage of social media to discover new trends, connect with existing audiences, reach new audiences, garner attention from the public, and build their brands.[202] Leaders use social media to capture users' attention, convey information to stakeholders, evangelize people around a common vision, engage in dialogue with stakeholders and people outside the organization, mobilize people around a common cause, and strategically direct the flow of information.[203] Employees will use social media to connect and collaborate with others (although it is also used for self-affirmation).[204] In the career context, employees use social networks like LinkedIn to network and find jobs,[205] but they may also use them to voice their concerns about the way things are and stand up to perceived unfairness and injustice.[206]

Furthermore, many organizations have developed their own in-house social-networking applications, known as *enterprise social software*, and most have their own presence on popular social media sites like Facebook, Twitter, and Instagram.[207] These internal social-networking platforms encourage employees to collaborate and to improve training, with some organizations reporting substantial annual increases in corporate network activity.

Most of Us Use It, but What Is Social Media Anyway? Most social networking sites that comprise social media share common features: They contain a *profile* outlining user information (e.g., pictures, biographies, interests, etc.), a *network* outlining the user's contacts (e.g., people, public figures, and companies), a *stream* outlining activity and interaction on the site (e.g., shared updates, updates from contacts, communications between contacts and other users), and, finally, a *message* element, which allows users to IM one another.[208] When users log in, they can perform a number of activities. They can *broadcast or view* information, *receive or give feedback* on this information, and engage in *comparison* between these processes and information.[209] Through these typical, interconnected elements, social media empowers employees, supervisors, and other organizational figures to organize by sharing information, collaborating, and communicating with one another quickly and efficiently.[210] Furthermore, the evolution of social media has led OB theorists to consider it to be more of a *context* than a *technology*. It is a virtual world, similar to in-person contexts, that affects employees' emotions, thoughts, and (in-person or digital) behaviors.[211]

You Are What You Post: Personality via Social Media Once we recognize that social media is most like a context, we come to understand that social media provides a stage upon which personality traits manifest and materialize

(see the chapter on personality and individual differences). For instance, researchers have found that people reliably view the use of certain words as representative of the Big Five personality factors and are accurately able to detect people's agreeableness, extroversion, and emotional stability through their posts.[212] Moreover, evidence suggests that this process occurs spontaneously—when you are viewing another user's feed, you automatically infer their personality traits from what you observe.[213] Furthermore, the Big Five personality factors have been linked to more "objective" behaviors online, with extroverted people tending to have more friends or followers on social media, and these friends were more likely to also be friends with each other.[214]

Beyond the Big Five, OB researchers have been fascinated with the extent to which dark personality traits relate to online social media behavior. For instance, researchers have linked narcissistic personality traits to the frequency of status updates and other social media activity across multiple networks,[215] especially when these behaviors are directed toward self-presentation (e.g., boasting about the great things going on in your life), social comparison (e.g., evaluating how you stack up to your friends and followers) and gaining new friends (e.g., obtaining more followers).[216] Like the Big Five discussed earlier, people are also able to accurately detect cues that reflect posters' levels of narcissism and psychopathy, although Machiavellianism is more difficult for people to detect.[217]

Research also suggests that personality predicts online engagement. Organizations who are struggling with getting customers or employees to interact with their content have found that people differ in the extent to which they enjoy interacting and sharing with others. For instance, MovieLens, an online movie recommendation community, found it was able to encourage more engagement from the community by enabling users to create and share Top Five movie lists with other users.[218]

The Personal and Relational Outcomes of Social Media Perhaps the biggest impact of social media has been on how people form relationships and connect with others. Some have speculated that social media use has led to some fairly drastic changes. For instance, the *shallowing hypothesis* suggests that social media usage has led to less reflective and more rapid thought that can result in shallow evaluations or judgments.[219] Others have examined its impact on explicit personal and relational outcomes, which have major implications for OB, especially when they directly concern or spill over to affect work.

First, social media can be a double-edged sword for people. It can be a good thing for employees' happiness and well-being when it enables them to make meaningful connections but a bad thing when it leads to comparing themselves with other people or makes them feel alienated.[220] Moreover, social media can be used as an effective tool to reduce loneliness when people use it to forge new social connections and enhance existing relationships (but not when it is used for escapism or when it supplants deeper in-person engagement).[221]

Second, research has demonstrated that social media can lead employees to engage in constructive dialogue with managers and coworkers, but only when they feel they have a sense of autonomy in what they can say online (e.g., a psychologically safe online space) and identify with their organization.[222] Furthermore, social media can lead employees to develop and build relationships with others who can help them in their careers, a benefit particularly enjoyed by those with extroverted personality traits.[223] However, the relational benefits of social media can be completely

undermined if employees become caught up in competition and social comparison. Hundreds of studies have demonstrated that social media use can negatively impact people's self-worth and self-esteem.[224] As some researchers put it: On social media, "every day is a high school reunion."[225]

Finally, in the team context, social media can help develop shared cognition among members by enabling members to manage and expand their teams' network, by integrating content they can use to better perform their jobs, and by making thoughts and decisions more accessible for use in later team taskwork (e.g., recorded discussions on a Facebook group news feed).[226] Social media can also facilitate the sharing of knowledge among team members as it can lead employees to develop a collective sense of trust and curiosity. However, team members are usually attracted to interacting on social media so they can engage with *nonwork* content. As such, they might not be sharing knowledge in the way that organizations would hope.[227]

The Organizational Outcomes of Social Media Since the dawn of social media decades ago, organizations have been concerned with the "public" nature of social media and the potential for damage to their reputations.[229] Indeed, it is difficult for management to control the content that employees post; even well-intentioned executives, managers, and employees post comments that could be construed as harmful to their organization's reputation or that reveal confidential or sensitive information.

An Ethical Choice

What Should You Do If an Employee Is Being Cyberbullied or Harassed Online?

U.S. law requires organizations to ensure that workplaces are free from discrimination and harassment. However, the fact that more and more employees are working remotely complicates the situation. If you are an employer, chances are that at least one of your employees has been affected by some form of online abuse. For instance, over 44 percent of Americans report having experienced online harassment. While anyone can be a victim of online harassment, people are often more likely to be targeted for their sexual orientation, gender identity, race, ethnicity, and religion and may face even more severe types of harassment. Even though more organizations are announcing their commitment to diverse, inclusive, and equitable work environments, action needs to be taken because the consequences of online abuse are significant. For example, a 2017 PEN America survey of writers and journalists found that over a third of respondents had experienced online harassment, reporting that it had impacted their professional lives.

How can employers take concrete actions to prepare for, respond to, and reduce the negative impact of online abuse?

1. Organizations must recognize the harm that online harassment can cause. Creating an environment in which employees feel comfortable, supported, and protected when reporting online abuse is essential. Many individuals who experience online harassment may have also been marginalized in other situations. As such, they may feel uneasy about potentially being dismissed, mocked, or even reprimanded.
2. Survey employees to determine the extent to which they face online harassment and how they are handling it. The survey should investigate how often employees are facing abuse and on what platforms. Also important is assessing the emotional, psychological, and professional impact of the harassment.
3. Develop protocols and training. These can help ensure that employees know the concrete steps they can take to protect themselves in case of online abuse.
4. Promote peer support networks. Online abuse can potentially lead those who experience it to feel isolated and alone. Peer support networks can give employees a space to find community, share experiences, and exchange strategies.
5. Managers can play a crucial role by reaching out and listening to employees. Due to their identities or life experiences, some employees may not feel comfortable sharing their situations publicly, so being discreet might be best.[228]

For instance, Indra Nooyi (the former CEO of PepsiCo) described in a 2018 interview how the company was exploring gender-specific advertising for Doritos, making a number of stereotyping and insensitive comments to that end. Following this gaffe, "lady Doritos" became a trending topic on social media, and the whole situation turned into a heated fiasco that was very damaging to the company's reputation.[230] As an additional example, the *New York Daily News*, shortly after being acquired by Tronc, made the decision to downsize the company by half—a decision that resulted in the termination of the entire social media team. After hearing the news, the social media team peppered the *New York Daily News'* Twitter account with disgruntled gifs and memes to voice their ire with the decision.[231] Many may downplay public image crises like these, but they do matter. One study found that both corporate and customer messaging on Twitter predicted stock analyst recommendations in S&P 500 companies. The message here is that social media messages have real financial implications for organizations.[232]

However, the concern with organizational reputation highlights a tension between employers and employees: employees who assert their right to authentically speak out about their experiences and perceptions at work, and organizations who endeavor to protect their reputation and brand.[233] This tension has led to a push and pull between granting and exercising autonomy versus control and regulation.[234] However, the climate surrounding social media has changed the business context so much that the way organizations manage their reputations has been completely transformed.[235] In the previous climate, news media outlets obtained and broadcasted information about organizations, which then led to the development of reputation. Organizations in many ways had a hand in this process by developing relationships with media outlets, threatening lawsuits or withdrawal of funding if the media outlet broadcasts damaging information, and developing their own communication and branding through advertising. Social media, on the other hand, put content distribution in the hands of people. Now, millions of people can post content, both factual and fake, about organizations that resounds and diffuses when shared throughout their networks—a process that can make or break an organization's reputation. The threat of legal action and attempts to control this process become extremely difficult at this scale. This has led many organizations to develop restrictive social media policies that limit employees' freedoms to share information, speak freely, and engage in dialogue with stakeholders.[236]

Cybersecurity

Security is a huge concern for nearly all organizations with private or proprietary information about clients, customers, and employees.[237] Organizations worry about the security of electronic information they seek to protect such as digital hospital patient data, physical information they still keep in records warehouses, and information they entrust their employees with knowing.[238] In general, cybersecurity threats can come from a variety of sources, all with various motivations: organized attackers (e.g., terrorists and spies), employees (e.g., disgruntled or opportunistic employees and even leaders), professional hackers or criminals, and even amateurs (e.g., malicious or curious outsiders who delight in the thrill of hacking).[239] As employees are the only group in this list companies have direct contact with, management may monitor employee online activity and communications, which can seem invasive to employees.

But employees are also concerned with their privacy—as a number of organizations get caught up in massive data breaches in which their personal information is stolen.[240] For instance, employee data from Seattle-based Nordstrom was breached and leaked via a third-party contractor.[241] This information included names, banking information, social security numbers, salary information,

and more. Tim Erlin, vice president of Product Management and Strategy at Tripwire, notes: "While we tend to see more headlines about customer data, compromises of employee data are also significant, especially to large employers who have thousands of employees. Think about the personal data that your employer has about you. There's enough data in there to carry out a variety of criminal activities, including identity theft and insurance fraud."[242] Employees are worried that social media networks do little to appropriately safeguard their information.[243] This has led employees to take safeguarding their privacy into their own hands by sharing less and keeping their personal information closer than before or by remaining vigilant over what they do share.[244]

What can employers do to mitigate the threat of data breaches and intellectual property loss? Experts say that it is important to (1) understand the threats in order to mitigate them, (2) build a culture that values cybersecurity, and (3) adapt to ever-changing cybersecurity threats.[245]

Cross-Cultural Communication

11-5 Recognize how to engage in effective cross-cultural communication in organizations.

There is a West African saying that suggests strangers see only what they know.[246] As diverse and multicultural people of the world, we all enter interactions and relationships with other people carrying our own set of assumptions, histories, experiences, traditions, practices, and languages. Aligned with cultural mosaic theory (see the chapter on diversity, equity, and inclusion in organizations), we are all like mosaics composed of many different tiles. However, when we interact with one another, in many ways we are strangers with an imperfect understanding of other people and the tiles that make them unique.

Effective communication is difficult under the best of conditions. Effective cross-cultural communication is no different and experiences its own unique challenges stemming from the values, traditions, and beliefs that differ across people. As an example, a gesture that is well understood and acceptable in one culture can be meaningless or lewd in another. An approach that is the default way of solving a problem in one culture may need to be avoided at all costs in another. Some emotions, such as feeling misunderstood, may not be as distressing in some cultures as they may be in others.[247]

A manager at L'Oréal once said, "We believe the more we debate openly and the more strongly we disagree in meetings, the closer we get to excellence, the more we generate creativity, and the more we reduce risk." But would L'Oréal employees from different backgrounds and cultures agree with this statement? Upon hearing this statement, an Indonesian L'Oréal employee noted that "to an Indonesian person, confrontation in a group setting is extremely negative, because it makes the other person lose face. So it's something that we try strongly to avoid in any open manner." Furthermore, a Mexican L'Oréal employee suggested "in Mexican culture, open disagreement is considered rude, disrespectful, and too aggressive."[248]

In this section, we discuss the ways in which culture affects communication along with how people in organizations communicate cross-culturally. First, we discuss the meaning and influence of cultural context. Second, we discuss the interface between cultures and how to navigate it. Third, we discuss the aspects of culture that affect communication. Finally, we provide an evidence-based guide toward effective cross-cultural communication.

Cultural Context

In the chapter on diversity, we described some of the many ways in which cultures differ by values and in norms. Cultures also tend to differ in the degree to which context influences the meaning individuals take from

high-context cultures Cultures that rely heavily on nonverbal and subtle cues in communication.

low-context cultures Cultures that rely heavily on words to convey meaning in communication.

communication.[249] In **high-context cultures** such as Japan, Kenya, Saudi Arabia, and India, people rely heavily on nonverbal and subtle cues in communicating with others, and a person's official status, place in society, and reputation carry considerable weight. What is *not* said may be more significant than what *is* said. In contrast, people from **low-context cultures** such as the United States, Australia, Germany, and Denmark rely essentially on spoken and written words to convey meaning; body language and formal titles are secondary (see Exhibit 11-5).

Exhibit 11-5 High- Versus Low-Context Cultures



Source: Based on E. Meyer, *The Culture Map: Breaking Through the Invisible Boundaries of Global Business* (New York, NY: Perseus, 2014).

Contextual differences mean quite a lot in terms of communication.[250] Communication in high-context cultures implies considerably more trust by both parties. What may appear to be casual and insignificant conversation in fact reflects the desire to build a relationship and create trust. Oral agreements imply strong commitments in high-context cultures. And who you are—your age, experience, and rank in the organization—is highly valued and heavily influences your credibility. But in low-context cultures, enforceable contracts tend to be in writing, precisely worded, and highly legal. Similarly, low-context cultures value directness. Managers are expected to be explicit and precise in conveying what they mean.

Some research suggests that high-context cultural approaches may result in better negotiation outcomes—because they direct attention toward the subtle and unspoken cues that might be valuable information during a negotiation.[251] What about when individuals from high-context and low-context cultures collaborate in virtual teams? As we described earlier, less "media-rich" channels (e.g., e-mail, text messages) may be more detrimental to those from high-context cultures, who rely heavily on subtle context cues, such as nonverbal behavior.[252] From a multicultural perspective, individuals with both backgrounds may be "ambidextrous" in their communication, and able to switch between modes or adapt the channels they use when communicating with others from high- or low-context cultures.[253]

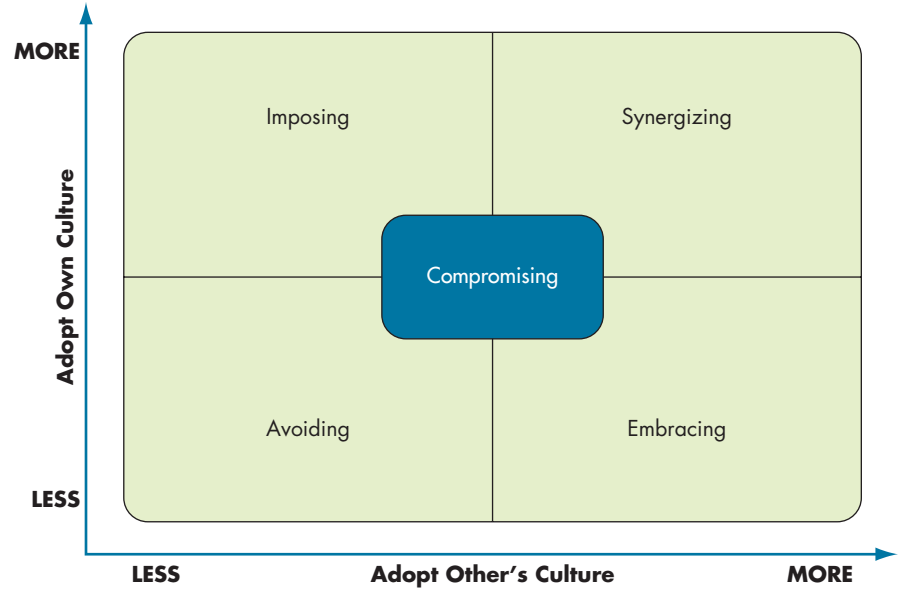
As a final note, attention to cues and context are not the only contextual feature that matters in cross-cultural communication: The situation also matters. Indeed, there are physical (e.g., opportunities for personal contact), affective (e.g., heightened risk or insecurity), and cognitive (e.g., ambiguity or uncertainty) aspects of situations that make culture aspects more or less salient.[254] When situations become extreme, cross-cultural communication is likely to become much more heated. For instance, professional translators have a very difficult job. One study in the *Armed Forces Journal* reported that interpreters deployed in Iraq were ten times more likely to die in combat than other soldier functions.[255] Furthermore, other OB theorists suggest that different cultural differences matter more or less in certain situations.[256] In typical communication contexts (e.g., involving routine interpretation or behavior), an understanding of norms, "the way things are done," and shared understandings for what is appropriate matter the most. However, in ethical or morally charged situations, cultural values (see the chapter on diversity, equity, and inclusion in organizations) begin to matter more than norms for routine behavior. This explains why people sometimes "act against" their cultural proclivities, like an American (from an individualistic culture) politician acting in collectivist ways to raise funds for their campaign.[257] Lastly, some situations may be more or less attributable to cultural values. These values-shaped situations can then determine who feels free to speak up and share their thoughts in a team setting. For example, psychological safety may be a function of a culture's masculine or feminine values (see the chapter on diversity, equity, and inclusion in organizations), empowering capable employees to speak up in masculine cultures and communicating that lower-capability employees are valued and should feel safe to speak up in feminine cultures.[258]

The Interface Between Cultures

When people find themselves in a cross-cultural communication situation, they are not at the mercy of the situation and do not behave in some predetermined way. There are complex dynamics surrounding the interaction that involve not only the context and situation but also (1) an understanding of one's own cultural approach and (2) an understanding of the interaction partner's cultural approach. To better understand these sometimes-opposing, sometimes-complementary forces, we depict a framework introduced by cross-cultural OB theorists in Exhibit 11-6. Essentially, in a cross-cultural interaction section, there is a trade-off between five approaches that all vary as a function of *one's own* and *others'* cultural approaches. Of course, it is important to assert that Exhibit 11-6 applies to *both* interaction partners in the communication episode.[259] Try not to think of the interaction as what can be done to manage "the other person" but rather how both interaction partners can come to an agreement on the cultural approach given the situation.

- **Avoiding (Low-Own/Low-Other):** Putting aside cultural preferences, values, practices, or customs, often for tactical or strategic reasons.
- **Imposing (High-Own/Low-Other):** Asserting one's own cultural preferences, values, practices, and customs without acknowledging others' cultural approaches.
- **Embracing (Low-Own/High-Other):** Putting aside one's own cultural preferences, values, practices, and customs in order to acknowledge or embrace others' cultural approaches.
- **Synergizing (High-Own/High-Other):** Celebrating both interaction partners' cultural preferences, values, practices, and customs, often in an improvisational or flexible way.
- **Compromising (Mid-Own/Mid-Other):** Treating the cultural interaction as a give-and-take; recognizing when cultural preferences, values, practices, and customs conflict and embracing some and putting aside others in order to reduce conflict.

Exhibit 11-6 Cross-Cultural Interaction Approaches



Source: Based on N. J. Adler and Z. Aycan, "Cross-Cultural Interaction: What We Know and What We Need to Know," *Annual Review of Organizational Psychology and Organizational Behavior* 5 (2018): 307–33.

Beyond these two dimensions, there is a third dimension that is just as important as the other two.[260] In a cross-cultural interaction in a business context, some situations are more extreme than others. As we mentioned earlier, the extremity and moral aspects of the situation often strongly enhance or greatly curtail cultural expressions in interaction. As such, there is also a strategic element to communication that matters. If the consequences for cultural expression or speaking out against violators of one's cultural values or norms become great, people may strategically abstain from expression or ignore violations.

Aspects of Cultural Communication

In cross-cultural communication, there are several aspects of others' cultures that can lead to differences in perspectives, perceptions, and attributions[261] (even though many aspects of communication tend to be fairly consistent across cultures, such as emotional displays and body language).[262] Many of these involve language.[263] For instance, *semantics* may lead to differences in interpretation of language. Words mean different things to different people, particularly people from different cultures. For example, "pena ajena" in Spanish and "fremdschämen" in German mean "to be embarrassed for someone" but are essentially untranslatable into English (although English speakers on the Internet may have started using "cringe" to describe this situation).[264] Or sometimes, you might feel afraid to ask someone else for help at work because you do not want to be a bother, hurt their feelings, or show that you cannot handle a situation on your own—the Thai language has a word for this: "greng-jai." Some of these aspects of cultural communication go well beyond language. For instance, studies suggest that some cultures (e.g., Japan) have extremely unique vocalizations and accents that convey specific emotions that are virtually uninterpretable to people from different cultures unfamiliar with them.[265]

Second, *word connotations* matter in cross-cultural communication because the same word can imply different things in different languages. Negotiations between U.S. and Japanese executives can be difficult because the Japanese word *hai* translates as "yes," but its connotation is "Yes, I'm listening" rather than "Yes, I agree." Although research suggests that the negative perceptions of someone making an error in word usage or connotation are diminished when one finds out they are from a different culture, this is not the case for etiquette violations. As such, misinterpretations from wording and language might be much less impactful than those involving norms and etiquette.[266] What might an etiquette mishap look like? For one, it could be the use of a *taboo* word, which can be distracting and offensive to the person for whom the word is culturally taboo.[267]

Third, *tone differences* can lead to emotional misconceptions during cross-cultural interactions. In some cultures, language is formal; in others, it is informal. The tone might change depending on the context: People may speak differently at home and in social situations than at work. Using a personal, informal style when a more formal style is expected might be seen as inappropriate. For example, Mexican employees are relatively formal in their dress and communication in the tire industry, compared with other countries—they also tend to use the formal version of you (*usted)* in the workplace rather than the informal version (*tú).*[268] As another example, studies of e-mail communication between Chinese and U.S. employees of a multinational firm found that Chinese employees preferred to engage in "*facework*" (i.e., phrases or questions meant to show they cared about the e-mail recipient, like "I hope all is well) and tended to leave their request to the end of the e-mail, behaviors that U.S. employees tended to dislike.[269] Or some cultures may require a tonally different set of actions than others to express certain emotions. For example, in one study, American participants perceived and expressed gratitude through touch and contact (e.g., hugs, handshakes), whereas Taiwanese participants expressed gratitude through self-improvement (e.g., living up to their social roles and cultivating personal skills).[270] Moreover, a separate study showed that verbal

expressions of gratitude might be seen as emotionally negative and uncomfortable by Chinese participants (when compared with Canadian participants).[271]

Fourth, cultures may differ in *tolerance for conflict and methods for resolving conflicts*. People from individualist cultures tend to be more comfortable with direct conflict and will make the source of their disagreements overt. People from collectivist cultures are more likely to acknowledge conflict only implicitly and avoid emotionally charged disputes. They may attribute conflicts to the situation more than to the individuals and therefore may not require explicit apologies to repair relationships, whereas individualists prefer explicit statements accepting responsibility for conflicts and public apologies to restore relationships.

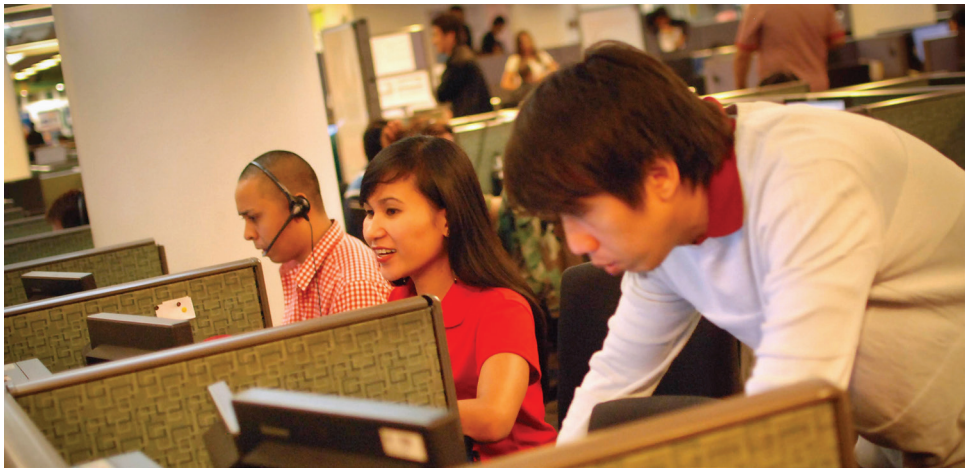
Fifth, cultures may differ in the *types of information they communicate to others*. For instance, one study comparing Japanese and American storytelling showed that the Japanese participants in this study were more likely to use collectivist language and refer to collectivist values in their storytelling than Americans (who tended to focus on individualistic language and information).[272] Another study comparing Korean and American Facebook users showed that Koreans viewed social media in a more collectivist, relational fashion than Americans and were more likely to engage in relationship-sustaining activities on the social network.[273] Lastly, another study of Spanish-speaking Latinx people found a clear preference for communicating with metaphor and analogy, which they found more convincing in arguments, and they liked people who used metaphor and analogy better than those who abstained from that type of language.[274]

In addition, while all cultures identify certain words and behaviors as *overly aggressive*, there are certain types of behaviors that are more likely to be identified as negative depending on the culture. In Israel, Pakistan, and Japan, there is a greater distinction between verbal and physical aggression. In the United States and Israel, behaviors that infringe on personal resources are considered aggressive, while Pakistan differentiates between different degrees of threats. Different standards for aggression reflect the ways that a person may interpret or respond to a conflict.[275]

A Guide to Cross-Cultural Communication

There is much to be gained from business intercultural communications. It is safe to assume that every one of us has a different viewpoint that is culturally shaped. Because we do have differences, we have an opportunity to reach the most creative solutions possible with the help of others if we communicate effectively.

According to Fred Casmir, a leading expert in intercultural communication research, we often do not communicate well with people outside our culture



Communication barriers exist between these call center employees in Manila, the Philippines, and their U.S. and Canadian customers even though they all communicate in English. Training helps these employees convey messages effectively to their customers.
Source: Dondi Tawatao/Getty Images

because we tend to generalize from only their cultural origin (e.g., through stereotyping; see the chapter on diversity, equity, and inclusion in organizations). For instance, one study of Jamaican-Indian software teams found that these virtual team members engaged in a process called *culturizing*, where they negatively stereotyped the culturally different team members and reinforced the boundaries between the groups.[276] This can be culturally insensitive and potentially disastrous, especially when we make assumptions based on observable characteristics. Many of us have a richly varied ethnic background and would be offended if someone addressed us based on stereotypical information or generalizations.

Casmir noted that, because there are far too many cultures for anyone to understand completely and individuals interpret their own cultures differently, intercultural communication should be based on sensitivity and pursuit of common goals. He found the ideal condition is an ad hoc "third culture" that a group can form when its members seek to incorporate aspects of each member's cultural communication preferences. The norms that this subculture establishes through appreciating individual differences create a common ground for effective communication. Intercultural groups that communicate effectively can be highly productive and innovative.

When communicating with people from a different culture, what can you do to reduce misinterpretations? Casmir and other experts offer the following suggestions:

Prior to Interaction

1. **Know yourself.** Recognizing your own cultural identity and biases is critical to understanding the unique viewpoints of other people.
2. **Foster a climate of mutual respect, fairness, and democracy.** Clearly establish an environment of equality and mutual concern. This will be your "third culture" context for effective intercultural communication that transcends each person's cultural norms. Ask yourself how you will remain open-minded and maintain a willingness to modify any stereotypes about the other members and their cultures.

During the Interaction

3. **Consider the other person's viewpoint.** Before saying anything, try to take the others' perspectives. Is what I am about to say potentially insensitive? Does it make assumptions about their background? If I am unclear about something, is it appropriate to just ask? Try to take a collaborative problem-solving approach whenever potential conflicts arise.
4. **Learn from misunderstandings.** Acknowledge when a misunderstanding has occurred, and if it was based on a stereotype or generalized assumption, try to correct this assumption. Try to leave the misunderstanding behind collectively from a position of mutual learning and in a way that strengthens the relationship and unites you toward your common goal.

After the Interaction

5. **Proactively maintain the identity and culture of the group.** Like any culture, the establishment of a common-ground "third culture" for effective intercultural communication takes time and nurturing. Reinforce the group's common goals, mutual respect, and need to adapt to individual communication preferences. After any interaction, consider how the new insights from the group can become a part of the group's permanent cognitive and behavioral understanding.
6. **Learn from all intercultural interactions.** After any intercultural interaction (not just this one), try to consider how you can take what you have learned from the situation and apply it to other situations you find yourself in to build your cultural intelligence (CQ) over time.[277]

Summary

In many ways, communication between people is one of the primary ways people behave in organizations, making it an essential component of OB. Communication plays a significant role in responding to crises, sharing and exchanging information with one another, and approaching ethical situations. From conversations and discussions, to written exchanges via e-mail and texting, to interpreting the subtle cues body language conveys, there are myriad ways we interact with one another. Although sometimes we are unaware of or lack control over how we communicate with others, employees and managers in organizations should try to manage their communication approaches and media to best suit the messages they are trying to convey and address any barriers to effective communication. Moreover, technological advances have highlighted the many ways in which we communicate with one another through time and space. For instance, videoconferencing, blogging, vlogging, podcasting, e-collaboration, and e-learning are common ways people communicate with one another virtually. In many ways, these virtual communication media are unique in that they are extremely rich and can get close to approximating in-person communication. They have evolved to develop their own language of sorts (through emojis, selfies, usernames, etc.). This increased media richness is made possible through technology. Smartphones, social media apps, and audiovisual equipment have enhanced access to these communication forms for many people. However, these advancements foretell an impending cybersecurity crisis that organizations are still trying to figure out how to manage. Finally, diversity and cross-cultural differences have significant implications for communication. The context and the content of communication matter for reconciling cultural differences, impacting OB outcomes like negotiation performance and conflict.

Implications for Managers

- Consider issues of (a)synchronicity when deciding how to communicate any messages. Does the message require everyone to be psychologically and physically present?
- Practice active and reflective listening to communicate more effectively and build stronger, trusting work relationships.
- Be aware of your message, language, and nonverbal communication—they can make or break an effective speech.
- Follow best practices and norms when communicating electronically to reduce stress and overload as well as to save time for you and your coworkers.
- Although we often do not have control over some of our more automatic, subtle nonverbal communication, we should be aware of how it influences the messages we are trying to convey.
- Reduce information overload by leveraging technology, develop personal and team awareness of information demands, and reduce the ambiguity and complexity of messages.
- If you are experiencing communication apprehension, develop emotion regulation techniques that enable you to cope with the increased apprehension.
- In crises, work together and use technology to make sense of the situation and to develop solutions to the problems the crisis produces.
- Mindfully use smartphones and social media to meet your personal and professional objectives. However, always be aware of the effect they may be

having on you. Take action when you recognize that their use is depleting or interfering with your well-being or health.
- Try not to see cross-cultural communication as you managing someone else's culture. Instead, view cross-cultural communication as something collaborative and reconciled through interaction, mutual understanding, and mutual learning.

Work Friendships Are Not a Good Idea

POINT

An ethical rule in psychotherapy, the dual relationship principle, helps explain why work friendships can go wrong. A therapist cannot be friends with a patient because every relationship has goals. When you have more than one relationship, goals can conflict and cause therapist-patient relationship issues. Although this rule does not directly apply to the workplace, friendships with colleagues can create a similar tension when there are conflicting goals.

For example, consider a situation in which someone is promoted to a management role and another person who was once their peer is now their direct report. A friendship between them can seriously complicate the interpersonal dynamics of this changed relationship. A manager must evaluate and sometimes critique the work performance of their direct reports. These tasks can be hard to do for a friend, strain the relationship between the two, and quickly pose a challenge to the team's or organization's operations.

While some individuals may effortlessly form friendships with their colleagues at work, there is also the risk that employees will feel left out when informal cliques form. In turn, ostracized individuals may form their own subgroups, isolating employees from one another even further and ultimately reducing communication between groups.

On the other hand, the closer the friendship, the more likely it will interfere with one's work performance. For example, intrusions (e.g., a friend sharing personal and work problems) may have adverse effects on one's ability to focus on their taskwork and goals. These disclosures are not only time-consuming, but they are also more emotionally engaging, less likely to be related to work tasks, and frequently emotionally depleting.

All of this is not to say that you still cannot be cordial and pleasant to your coworkers. However, keeping these relationships professional is ultimately in your best interests and those of the organization.

COUNTERPOINT

Given that you likely spend between a third and a half of the hours you are awake each week at work, your relationships with people at work can be some of the most significant relationships in your life. Furthermore, having good relationships with your coworkers is one of the strongest predictors of your happiness at work. Informal social relationships also offer benefits like emotional support, cultivating positive identity development, and socialization.

If there are any costs to workplace friendships, the benefits probably greatly outweigh these costs. For example, the positive affect experienced as a result of forming workplace friendships can likely prevent exhaustion at work. This effect has the potential to result in at least partial improvements in job performance. Thus, while certain aspects of workplace friendships (e.g., emotional support) may seem distracting to work, relationships with coworkers may ultimately improve work performance. Communicating with colleagues helps decrease the salience of emotional distractions and allows employees to better focus on work tasks.

The key is to create boundaries between coworkers by either avoiding work-related topics outside the office or agreeing on the topics to avoid in social situations with coworkers. Workplace friendships do not have to create conflicts of interest. Instead, they can be quite rewarding as long as they are navigated appropriately. Lastly, belonging is a fundamental human need. Given that we spend eight to nine hours every day at work, we often have much less time to meet our social needs outside work. As a result, the workplace can be an ideal place to form positive connections with others and benefit our overall well-being, health, and productivity.[278]

CHAPTER REVIEW

QUESTIONS FOR REVIEW

11-1 What are the types of interpersonal communication?

11-2 How does one choose between communication methods and handle barriers to effective communication?

11-3 What are the various forms of virtual communication used in modern organizations?

11-4 What are the issues surrounding smartphones, social media, and cybersecurity confronting modern organizations?

11-5 How can one engage in effective cross-cultural communication in organizations?

APPLICATION AND EMPLOYABILITY

The ability to communicate with others effectively is vital to succeeding in the workplace. Communication allows us to lead groups and teams effectively, provide and receive feedback, share emotions, inspire and persuade others, and exchange information. A strong understanding of how to communicate effectively with others can help you be a better manager or employee by allowing you to share information, coordinate with your team, and reduce misunderstandings. In this chapter, you learned critical thinking, creativity, collaboration, and leadership skills by discovering the power of listening for building working relationships, considering what to do if a subordinate or coworker is cyberbullied, considering the role public and private organizations should play in providing Internet access, and debating whether work friendships are a good idea. In the next part of the chapter, you will build your communication and self-management skills by role-playing a communication incident between a supervisor and subordinate at a café, considering the ethics of "bring-your-own-device" workplace policies, and discovering how to convey passion during employment interviews.

EXPERIENTIAL EXERCISE Choosing the Right Modes of Communication

Pair up with someone you have never worked with before. In this exercise, you will pretend to be Gerard, the head of the accounting department in the company. During an intense week, you receive the following e-mail from the human resources director.

> Subject: A difficult situation with an employee
>
> Dear Gerard,
>
> I am writing to inform you about a difficult situation we are handing among the personnel. An employee from the marketing department is experiencing interpersonal tensions with the boss and two colleagues, due to which he is frequently absent from work. As he is a valued employee with good performance records in the past, we have decided that changing offices could be beneficial for him and the company.
>
> We believe that your department would be a good environment for this employee to feel more engaged on the job. Two colleagues from HR will assist you and the employee in the transition process, which we hope to begin next month. All the people involved so far have demonstrated great collaboration with us, and we are sure you will do the same. Sorry for the short notice, but we are facing strict deadlines this month.
>
> Do not hesitate to contact me if you have further questions. We will be monitoring the situation with monthly check-ins. I would like to thank you in advance for the welcome you will be giving the employee.
>
> Thanks,
>
> Michel L. Dalton
>
> HR Director

You are both surprised by and disappointed in this e-mail for several reasons, including the decision to communicate such an important information via e-mail, the short notice period, and above all, the fact that you were not consulted in the decision before. However, you also know that helping the organization to retain its talents is the right thing to do. Take five minutes and, individually, write draft replies to Michel telling him whether you will welcome the employee. Then try to find an agreement together about the definitive reply to send the HR director, and discuss the following questions.

Questions

11-6. Were the both of you in agreement about the reply to send the HR director?

11-7. What alternative modes of communication would you have used in similar circumstances? Why?

11-8. Discuss with your partner the possible impact on Gerard's reputation and career if he accepts or denies the HR director's request. What changes in HR practices could avoid this situation in the future?

ETHICAL DILEMMA BYOD

"What's your cell phone number? Good, I'll call you about the meeting." If you are like many people in the world who have used a smartphone for years or one of the 1.4 billion people who bought one recently, chances are you have used it for work. In fact, your employer may have even invited—or asked—you to use your smartphone, tablet, or laptop in your job. Such is the bring-your-own-device (BYOD) trend, which started out of friendly convenience but now carries major ethical issues. For instance:

- *Did you know your employer can wipe your personal devices clean?* Remotely? With no warning? It happens, especially considering that 31 percent of organizations require employees to BYOD to work and 61 percent of organizations expect their employees to be available remotely, without giving company-owned devices. Anytime an organization has a privacy concern, it may wipe all devices clean to prevent a further breach of its cyber defenses, as long as the employee has consented to a "mobile device management" agreement. For instance, Rivers (a former transgender Google employee) had her entire personal phone wiped almost completely to the point that it appeared like it was back at factory settings. This was especially painful for Rivers, who lost four months of her transition timeline photos that she will not be able to get back.
- *Is your device part of your employment contract, either explicitly or by understanding?* If so, who pays for the device? Well, you did, and you continue to pay for the service. If the device breaks, who pays for the replacement device? Can you lose your job if you cannot afford the device and service?
- *Can you use your device for all work-related communications?* The cloud has brought opportunities for people to send classified work information anywhere, anytime. Organizations are concerned about what social media, collaboration, and file-sharing applications are in use, which is fair, but some policies can limit how you use your own device.
- *Once you use your personal device for work, where are the boundaries between work and home life?* Research indicates that intensive smartphone users, for instance, need to disengage in their off-hours to prevent work–home stress and burnout. Yet not everyone can do this, even if they are allowed to; research indicates that a significant proportion of smartphone users felt pressured to access their devices around the clock, whether or not that pressure was warranted.

The clear dilemma for employees is whether to acknowledge you own a smart device, and whether to offer its use for your employer's convenience. Put that way, it seems obvious to say no: Why would you risk possibly losing everything to a corporate swipe? But the convenience of carrying one phone is real. Some people think it is better to carry two phones—one for work, another for personal use. Attorney Luke Cocalis tried it and concluded, "It frankly keeps me saner."

Questions

11-9. Do you use your smartphone or other personal devices for work? If so, do you think this adds to your stress level or helps you by providing convenience?

11-10. Cocalis likes the two-phone lifestyle and says that his supervisor has his personal phone number only for emergencies. But assistant talent manager Chloe Ifshin reports that it does not work so well in practice. "I have friends who are clients and clients who are friends," she says, so work contacts end up on her personal phone and friends call her work phone. How does this consideration affect your thinking about using your own device for both work and leisure?

11-11. Organizations are taking steps to protect themselves from what employees might be doing on their personal devices through allowing only approved computer programs and stricter policies, but no federal regulations protect employees from these restrictions. What ethical initiatives might organizations adopt to make this situation fair for everyone?[279]

CASE INCIDENT How Do You Communicate That You Are Passionate During an Interview?

Kennedy had an impressive résumé, highlighting many technical projects, developmental experiences in previous jobs, several student awards, and excellent school grades. However, after interviewing at a new high-tech startup focused on robotics and machine learning, Kennedy was not offered the position—leaving Kennedy with a great deal of disappointment.

Fortunately, though, Kennedy learned the reason behind the decision from a colleague who worked at the company who disagreed with the decision. Quite simply, the interviewers believed that Kennedy was not passionate enough. More specifically, they noted that Kennedy was quiet, did not provide specific information about the unique contributions made to the projects listed on his résumé, and did not demonstrate the level of effusiveness they often saw in promising candidates.

After hearing this information, Kennedy immediately knew why there had been a disconnect. Growing up in Hong Kong, family members and teachers taught Kennedy to be very modest about accomplishments. But Kennedy was interviewing for a company in the United States, where there are different expectations and norms for a job search. Kennedy realized it was necessary to find some way to convey excitement and commitment in interviews without a complete personality change.

Kennedy thought that future job interviews might be an excellent opportunity to discuss hobbies and interests. Kennedy loved to develop computer programs and build robots on the weekends. During an upcoming interview at a similar company, Kennedy planned to show some of these robots' videos to demonstrate enthusiasm and commitment to the interviewers.

Questions

11-12. Do you believe Kennedy's actions will effectively communicate passion and commitment during the upcoming interview? Why or why not? Would your answer be different if Kennedy's hobbies had nothing to do with the job?

11-13. Do you agree with Kennedy's decision to do something different? Why or why not? What other actions could Kennedy take to communicate that he is passionate?

11-14. Do you agree that demonstrating passion is a good predictor of a great job candidate worthy of being considered during the hiring process? Why or why not? How important are passion and commitment compared with other predictors of a job candidates' success (e.g., knowledge, skills, abilities, emotional intelligence, personality traits)?[280]

12 Leadership



Source: Amy Harris/Invision/AP/Shutterstock

LEARNING OBJECTIVES

After studying this chapter, you should be able to:

12-1 Summarize the conclusions of trait theories of leadership.

12-2 Identify the central tenets and main limitations of behavioral theories of leadership.

12-3 Contrast contingency theories of leadership.

12-4 Describe the positive leadership styles and relationships.

12-5 Discuss the roles of leaders in creating ethical organizations.

12-6 Describe how leaders can have a positive impact on their organizations through building trust.

12-7 Identify the challenges and opportunities to our understanding of leadership.

Employability Skills Matrix (ESM)

	Myth or Science?	An Ethical Choice	Point/ Counterpoint	Toward a Better World	Experiential Exercise	Ethical Dilemma	Case Incident
Critical Thinking & Creativity	✓	✓	✓		✓	✓	✓
Communication		✓		✓	✓		
Collaboration				✓	✓		
Self-Management			✓	✓		✓	✓
Social Responsibility		✓		✓		✓	
Leadership	✓	✓	✓	✓	✓	✓	✓
Career Management	✓		✓	✓		✓	✓

THE TIME IS NOW

As CEO of Walgreens Boots Alliance, Rosalind Brewer is currently the only Black woman leading a Fortune 500 company—and only *the third* in modern history. Brewer has served as a compelling role model for aspiring leaders. She has spent over twenty years rising through the corporate ranks to be in the position she is in today. In fact, Brewer started as a research technician known for her strong analytical, operational, and strategic skills. At the same time, she is also well known for her servant leadership style, empowering teams to make decisions focusing on how to support their needs autonomously.

Throughout her career, Brewer has remained committed to furthering diversity, equity, and inclusion (DEI). She has played a crucial role in company-wide transformations throughout her career. For example, when two Black men were sitting in a Starbucks waiting for their business partner in 2018, a barista called the police on them. A video of their arrest soon spread, leading to public outrage and protests. In response, Brewer (COO of Starbucks at the time) was quick to condemn the event publicly. She spoke about how it

impacted her personally as a Black woman with a son the same age as the arrested men. A month after the incident, Starbucks closed all U.S. stores to conduct racial-bias training for employees. The organization then implemented twelve additional training programs in the months that followed to cover topics such as empathy, inclusion, and team building. Brewer also led changes and refinements to Starbucks's store policies concerning DEI goals.

As an outspoken advocate on racial and gender equity, Brewer's transformations were not entirely smooth; she encountered much criticism and resistance along the way. For example, in a 2015 interview, she described a particularly contentious meeting she took part in as the CEO of Sam's Club. In this meeting with a major supplier of Sam's Club, all the other executives in attendance were White men. Brewer called this meeting to discuss their team's lack of diversity with the supplier. Her recollection of the meeting in the interview was met with considerable public backlash, with some calling for a boycott of Sam's Club stores. Brewer was merely trying to start a much-needed conversation about race. Many other executives, such as the president and CEO of Walmart, jumped to her defense: Brewer "was simply trying to reiterate that we believe diverse and inclusive teams make for a stronger business. That's all there is to it and I support that important ideal."

Despite the occasional criticism, Brewer continues to use her platform to draw attention to injustices or systemic oppressive structures. More specifically, Brewer believes a three-part strategy is needed to make organizations more diverse and inclusive. First, she cautions leaders from getting too caught up in the numbers game. Instead, leaders should spend time creating inclusive environments where people feel safe to be their authentic selves. Second, Brewer also suggests leaders should focus on building relationships, particularly with underrepresented employees and those from marginalized backgrounds. While at Starbucks, she frequently held breakfast sessions with employees, including baristas, to hear their stories and feedback. Lastly, investing in mentorship and sponsorship is critical. Brewer believes executives need to structure mentorship programs to allow all employees, particularly those from underrepresented backgrounds, to access senior leaders who can serve as mentors and sponsors. For Brewer, the time is now for organizations to apply these measures so that DEI can become less of a buzzword and more of a concrete leadership initiative.[1]

Leaders possess something that sets them apart from others. For instance, Gloria Boyland (board member of UNFI, Vontier, and Chesapeake Energy) has been referred to as one of the most powerful women in corporate America. Boylan spends much of her time coaching and guiding executive leaders, inspiring them, and reaffirming their vital role to their organizations. As the

former vice president of operations and service support at FedEx, she was well known for giving much autonomy to her followers: One of her guiding principles is, "Step back so others can step up."[2] She notes that she has learned a lot from FedEx founder and CEO Fred Smith, who leads by example as a transformational, motivational leader. As a Black woman, the cards have been stacked against her: Corporate leadership is dominated by White men, and women are compelled by leader stereotypes to be both warm and tough at the same time.[3] Boyland exhibits many of the characteristics and behaviors of a leader while also highlighting some of the modern challenges facing leadership (e.g., a lack of ethnic and gender diversity).[4]

Surely, you have noticed, though, that not all leaders are managers, nor are all managers leaders. *Nonsanctioned leadership*—the ability to influence that arises outside the formal structure of the organization—is sometimes more important than formal influence. For example, Marcy Shinder (now chief marketing officer [CMO] at Work Market) builds relationships with coworkers at work and has informally emerged as a leader shortly after being hired.[5] Although it has been defined in several ways and involves traits, behaviors, and other factors,[6] we define **leadership** as the ability to influence a group toward the achievement of a vision or set of goals.[7] Organizations need strong leadership *and* strong management for optimal effectiveness. We need leaders to challenge the status quo, create visions of the future, and inspire organizational members to achieve the visions. We need managers to formulate detailed plans, create efficient organizational structures, and oversee day-to-day operations.

leadership The ability to influence a group toward the achievement of a vision or set of goals.

Trait Theories

12-1 Summarize the conclusions of trait theories of leadership.

Strong leaders have been described by their traits throughout history. Therefore, leadership research has sought to identify the personality, social, physical, or intellectual attributes that differentiate leaders from nonleaders. These **trait theories of leadership** focus on personal qualities, including personality traits like those in the Big Five (see the chapter on personality and individual differences) and characteristics that predict two distinct outcomes: leadership emergence and leadership effectiveness.[8] Keep in mind that just because someone exhibits the right traits and others consider that person a leader does not necessarily mean they will be effective or successful as a leader. Echoing the person-situation approach we discussed in the chapter on personality and individual differences, leader behavior is a function of traits and the situation.[9] In support, researchers and human resource (HR) practitioners have used machine learning and artificial intelligence (AI) approaches to try to predict leader effectiveness from several leader characteristics and found that both traits and situational features are important predictors of leader effectiveness.[10] One situational characteristic of interest is the power distance within a work group or team (see the chapter on diversity, equity, and inclusion in organizations). Researchers have found that leader extroversion, for instance, is more effective in teams with higher power distance values because leaders can bridge the hierarchy between people and cause team members to coordinate, collaborate, and identify together as a team.[11]

trait theories of leadership Theories that consider personal qualities and characteristics that differentiate leaders from nonleaders.

Personality Traits and Leadership

What makes a person a leader? In general, individuals who like being around people and who can assert themselves (extroverted), who are disciplined and able to keep commitments they make (conscientious), and who are creative and flexible (open) have an apparent advantage when it comes to leadership.

Big Five Traits In examining the Big Five personality traits, researchers have consistently found extroversion to be important for several leadership outcomes. Despite being the strongest predictor of motivation to lead and leader emergence,[12] extroversion also predicts several leadership behaviors or styles. For example, extroverted leaders are more likely to use transformational leadership styles and consideration behaviors (as described later in this chapter).[13] As such, they are likely to be considered more effective leaders, although it is the *agentic*, bold, or assertive aspects of extroversion that account for this—not necessarily the warm, sociable, *affiliative* aspects.[14] For example, these agentic aspects are responsible for executive behaviors that can be construed as both "good" and "bad"—such as enacting socially responsible policies or instituting mass layoffs to conserve capital.[15] They are also perhaps responsible for explaining why women often under-emerge as leaders: Women are stereotypically associated with the affiliative aspects of extroversion, which affects the extent to which they are perceived as participating in leadership processes.[16] So although extroversion can predict effective leadership, the relationship may be due to unique facets of the trait. As a caveat, however, being "too bold" or "too warm" can also hurt your chances of emerging as a leader.[17]

Although agreeableness and emotional stability are important to some aspects of leadership (e.g., they predict follower satisfaction with the leader), openness to experience appears to be less important as a trait despite being a modest predictor of leader effectiveness and follower voice behavior (see the following chapter on power and politics).[18] Conscientiousness, on the other hand, appears to be important for several leadership behaviors and outcomes. For example, conscientiousness predicts initiating structure behaviors *as well as* consideration behaviors (as described later in this chapter).[19] Conscientiousness is also a moderate predictor of leader effectiveness and follower satisfaction[20] as well as the strongest leader trait predictor of group performance.[21]

Proactive Personality Traits Leaders' proactive personality also has an important influence on leadership outcomes. In particular, it appears to matter during specific times during a team, department, or organization's life cycle.[22] For instance, leader proactivity makes all the difference in leadership transitions, as leaders are more likely to foster followers' identification with their new agenda, become more behaviorally engaged in their work, and engage in voice behavior. This is especially the case when the incoming leader was much more proactive than the previous leader (making the new leader appear better by comparison!).[23] Proactive leaders also appear to be more effective in groups and teams in which the members have a high need for relational approval because they are able to craft supportive environments that fulfill this need. These team members perform better and become more committed to their teams when they are led by proactive leaders.[24]

Dark Triad Traits What about the Dark Triad personality traits (see the chapter on personality and individual differences)? Research indicates they are not all bad for leadership: Normative (midrange) scores on the Dark Triad personality traits (even psychopathy) were optimal, suggesting that having too much (or too little) of the Dark Triad traits can result in ineffective leadership. However, this may be attributable to whether followers spend a lot of time with their leaders. When followers work closely with their leaders, they have more opportunity to observe exploitative or toxic behavior, which can diminish their trust in the leader and undermine their perceptions of leadership effectiveness.[25] Furthermore, regardless of these traits' impact on performance, the trait activation perspective (see the chapter on personality and individual differences)

suggests that when these leaders feel that they are treated unfairly or are entitled to better treatment, they will be more likely to act in self-interested, destructive ways that can be harmful to the organization.[26]

Thankfully, research indicates that building self-awareness and self-regulation skills may be helpful for leaders to control the effects of their Dark Triad traits.[27] This self-awareness may be difficult for leaders to achieve, especially since narcissists tend to engage in self-enhancement (e.g., perceive themselves more positively than others see them) and be selective in the feedback they elicit and listen to when it comes to leadership.[28] Another way in which the toxic effects of dark traits can be mitigated is through consultation with followers. For instance, employees at a large Chinese IT company were not as fazed by their leaders' narcissistic traits when those leaders sought out their feedback and considered it.[29]

Emotional Intelligence and Leadership

Another trait that may indicate effective leadership is emotional intelligence (EI). As discussed in the chapter on emotions and mood, a core component of EI is empathy. Empathetic leaders can sense others' needs, listen to what followers say (and do not say), and read the reactions of others. A leader who effectively displays and manages emotions will find it easier to influence the feelings of followers by expressing emotions appropriate for the context, such as genuine sympathy and enthusiasm for good performance.[30] Although the association between leaders' self-reported EI and transformational leadership (to be discussed later in this chapter) is moderate, it is much weaker when followers rate their leaders' leadership behaviors.[31] However, people high in EI are more likely to emerge as leaders, even after taking cognitive ability and personality into account.[32]

Based on the latest findings, we offer two conclusions. First, traits can predict leadership. Second, traits do a better job predicting the emergence of leaders than distinguishing between effective and ineffective leaders.[33] As a final note regarding the future of personality and leadership, recent research and theory have "flipped" the relationship between the two. Just as it is possible for personality to predict leadership, some suggest that engaging in leadership



As the CEO of Women's Bean Project, Tamra Ryan leads a team of professionals in managing the social enterprise that helps women earn a living while teaching them work and life skills. Her traits of extroversion and conscientiousness contribute to her success.

Source: David Zalubowski/AP Images

behaviors and taking on leadership roles can even *change your personality*, with leaders becoming more conscientious over time as they engage in leadership activities.[34]

Trait theories help us *predict* who emerges as leaders (and perhaps who will be effective leaders), but they do not fully *explain* leadership actions. What do successful leaders do that makes them effective? Are different types of leader behaviors equally effective? Behavioral theories, discussed next, help us define the parameters of leadership.

Behavioral Theories

12-2 Identify the central tenets and main limitations of behavioral theories of leadership.

behavioral theories of leadership Theories proposing that specific behaviors differentiate leaders from nonleaders.

Trait theories provide a basis for *selecting* the right people for leadership. **Behavioral theories of leadership**, in contrast, imply we can *train* people to be leaders.[35]

The most comprehensive behavioral theories of leadership resulted from the Ohio State Studies,[36] which sought to identify independent dimensions of leader behavior. Beginning with more than a thousand dimensions, the studies narrowed the list to two that substantially accounted for most of the leadership behavior described by employees: *initiating structure* and *consideration*.

Initiating Structure

initiating structure The extent to which a leader defines and structures their role and those of their followers to facilitate goal attainment.

Initiating structure is the extent to which a leader defines and structures their role and those of their followers to facilitate goal attainment. It includes behavior that attempts to organize work, work relationships, and goals. A leader who engages in initiating structure behaviors is someone who assigns followers tasks, sets definite standards of performance, and emphasizes deadlines. (You may now see why, as we mentioned earlier, conscientiousness would be an important personality trait to have here!) According to a review of hundreds of leadership studies, initiating structure is more strongly related to higher levels of group and organization productivity and to more positive performance evaluations.[37]

Consideration

consideration The extent to which a leader has job relationships that are characterized by mutual trust, respect for subordinates' ideas, and regard for their feelings.

Consideration is the extent to which a leader works to establish relationships characterized by mutual trust, respect for employees' ideas, and regard for their feelings. A leader who engages in consideration helps employees with personal problems, behaves in a friendly and approachable manner, treats all employees as equals, and expresses appreciation and support (people-oriented). Most of us want to work for considerate leaders—according to one study by the National Bureau of Economic Research consisting of millions of responses over several years, working with a boss like this was "equivalent to the increased satisfaction that comes from more than doubling your household income"![38] Indeed, research suggests that the followers of leaders high in consideration were more satisfied with their jobs, were more motivated and less stressed, and had more respect for their leaders.[39]

Initiating structure and consideration have several important practical implications for organizations. For instance, initiating structure and consideration behaviors have both been linked to whether employees who engage in those behaviors are selected into leadership succession planning programs and pipelines.[40] In other words, people who act like leaders have a higher likelihood of being considered for selection or succession into leadership positions.

Emotions and other factors also play roles in whether leaders engage in these behaviors. For example, leaders who are proud and self-confident

(but not excessively or hubristically so) tend to engage in these leadership behaviors to a great extent.[41] The situation also plays a role. For instance, when faced with understaffing, leaders engage in initiating structure and consideration to different degrees depending on the *type* of understaffing.[42] When understaffing is widespread, leaders will engage in initiating structure to ensure work processes and procedures are effective and efficient. When there is expertise understaffing (e.g., limited talent in key roles in which turnover would be devastating), leaders engage in more consideration behaviors—showing their appreciation for key talent. Finally, with regard to cultural differences, research on thousands of managers in dozens of countries suggests that culture is much less important than the organization or managers themselves in determining whether they practice consideration or initiating structure behaviors.[43]

An Ethical Choice

The Ethics of Nudging

Although management and leadership often involve making direct requests or even commands of others, they can also rely on subtler, more indirect means. For instance, effective leadership can involve creating an environment in which others can make better decisions. One promising technique that can allow leaders to foster this type of environment is nudging. The crux of the nudging technique is to alter how decisions are made to divert (or nudge) them so that they lead to desirable outcomes. The most common type of nudge requires changing the default choice decision makers confront.

For example, a well-known nudge encourages organ donation in European countries by automatically enrolling citizens in the system. They can opt out if they prefer. By automatically enrolling people in the program, citizens are "nudged" toward donating their organs upon passing. However, citizens are still given a choice and allowed to opt out if they do not want to donate their organs. The results demonstrate the effectiveness of nudging—the program increased the number of people agreeing to be donors from fewer than 30 percent to 80 percent.

Leaders can use nudging to influence people to make more ethical decisions. Take the case of the company Slice, which sells short-term insurance to individuals running home-based businesses. The company's goal was to encourage people to be more honest when submitting insurance claims. The company accomplished its goal with the help of nudging. For instance, requiring claimants to film a short video to describe the claim was particularly useful, likely because people are less likely to lie in a video than in writing.

Finally, many companies experience difficulty identifying abusive leaders before significant damage is done. Why? Leaders' performance is commonly based on financial measures but not on the processes through which leaders achieved those numbers. Executives can also use nudging to reduce abusive supervision in middle managers, team leaders, and front-line supervisors. Executives can employ a process-oriented performance management program for leaders, which bases employment decisions on specific actions leaders must take (rather than an exclusive focus on financial performance) and provides continuous feedback to leaders. This form of nudging alters the decision-making architecture for both executives and leaders to prevent the escalation of undesirable behaviors.

Nonetheless, nudging is not without its challenges. Nudges are not always perceived as helpful and may even be viewed as manipulative or patronizing. However, there are steps that managers can take to overcome negative perceptions of nudging:

1. **Be transparent about the purpose of nudges.** One misconception is that nudges must be hidden to be effective, but to the contrary, disclosing a nudge has not been found to affect its impact. Transparency can help to resolve suspicion that individuals may have about a nudge.
2. **Co-creating nudges helps to respect employee autonomy, prioritize solutions, and avoid potential roadblocks.** When employees are involved in the process, nudges are likely to be more effective, as they consider their needs and the specific decisions they frequently face.
3. **Constructive framing is vital.** For example, framing nudges in a health care system as helping physicians avoid mistakes may be viewed negatively. In contrast, framing nudges as a way to provide physicians with performance feedback can be more constructive and motivating.[44]

Summary of Trait Theories and Behavioral Theories

In general, research indicates there is validity for both the trait and behavioral theories. Parts of each theory can help explain facets of leadership emergence and effectiveness. However, identifying the exact relationships is not a simple task. The first difficulty is in correctly identifying whether a trait or a behavior predicts a certain outcome. The second is in exploring which combinations of traits and behaviors yield certain outcomes. The third challenge is to determine the causality of traits to behaviors so that predictions toward desirable leadership outcomes can be made.

This final challenge is complicated by the varieties of contexts and situations leaders may find themselves in. Some leaders may have the right traits or display the right behaviors—but still fail. Context matters, too, which has given rise to the contingency theories we discuss next.

Contingency Theories

12-3 Contrast contingency theories of leadership.

Some leaders seem to gain a lot of admirers when they take over struggling companies and lead them out of crises. For example, Alfred Glancy III saved the Detroit Symphony Orchestra (DSO) as it teetered on the edge of failing. However, predicting leadership success is more complex than merely leading a group out of crisis. Glancy dealt with a lot of this complexity: refusing to spend beyond the DSO's means, negotiating labor agreements, resolving the debt burden, and amplifying fundraising efforts—all while staying true to the art. Importantly, the leadership style that works in tough times does not necessarily translate to long-term success. For example, after times got better, Glancy turned to more innovative approaches to developing the DSO: upgrading the technology of its global webcast series and improving lighting and electronics in the Orchestra Hall, among other innovative approaches. As you can see, being an effective leader can be highly contingent upon situational demands.[45]

The Fiedler Model

Fiedler contingency model The theory that effective groups depend on a proper match between a leader's style of interacting with subordinates and the degree to which the situation gives control and influence to the leader.

leader–member relations The degree of confidence, trust, and respect that subordinates have in their leader.

task structure The degree to which job assignments are regimented or structured.

position power The degree of influence derived from one's formal structural position in the organization. This includes the power to hire, fire, discipline, promote, and give salary increases.

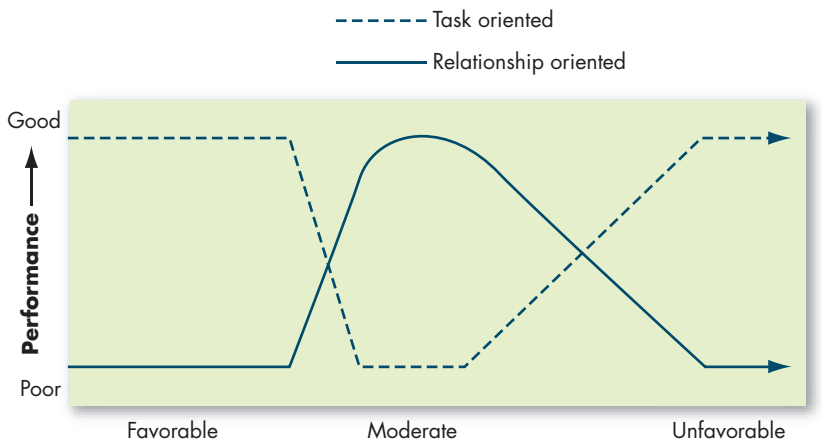
Fred Fiedler developed the first comprehensive contingency model for leadership.[46] The **Fiedler contingency model** proposes that group performance depends on the proper match between a leader's style and the degree to which the situation gives a leader control. According to this model, leadership styles reflect the degree to which leaders approach situations from either a *task-oriented* or *relationship-oriented* perspective. These leadership styles align with the degree to which they use the initiating structure or consideration behaviors discussed earlier. Moreover, these leadership styles are generally assumed to be stable or permanent.

With regard to the situation, we can assess it in terms of three contingency or situational dimensions:

1. **Leader–member relations** is the degree of confidence, trust, and respect that members have in their leader.
2. **Task structure** is the degree to which the job assignments are regimented (that is, structured or unstructured).
3. **Position power** is the degree of influence a leader has over power variables such as hiring, firing, discipline, promotions, and salary increases.

According to the model, the more structured the leader's job assignment becomes and the stronger the position power given to the leader, the more

Exhibit 12-1 **Predictions from the Fiedler Model**



Category	I	II	III	IV	V	VI	VII	VIII
Leader–member relations	Good	Good	Good	Good	Poor	Poor	Poor	Poor
Task structure	High	High	Low	Low	High	High	Low	Low
Position power	Strong	Weak	Strong	Weak	Strong	Weak	Strong	Weak

control the leader has. The favorable situations are on the left side of the model in Exhibit 12-1. A very favorable situation (in which the leader has a great deal of control) might include a payroll manager who has the respect and confidence of the employees (good leader–member relations); activities that are clear and specific—such as wage computation, check writing, and report filing (high task structure); and considerable freedom to reward and punish employees (strong position power). An unfavorable situation, to the right in the exhibit, might be that of the disliked chairperson of a volunteer fundraising team (low leader–member relations, low task structure, low position power). In this job, the leader has very little control. According to the theory, when faced with extreme situations (e.g., very favorable or unfavorable conditions; categories I, II, III, VII, and VIII), task-oriented leaders perform better. Relationship-oriented leaders (represented by the solid line), however, perform better in moderately favorable situations—categories IV, V, and VI.

Studies testing the overall validity of the Fiedler model were initially supportive, but the model has not been studied much in recent years.[47] Furthermore, some of the predictions from Fiedler's theory have not been supported: For instance, relationship-oriented leaders have been found to perform *very well* in favorable conditions.[48] While it provides some insights that we should consider, our understanding of how the situation affects leadership has advanced with more modern contingency theories.

Situational Leadership Theory

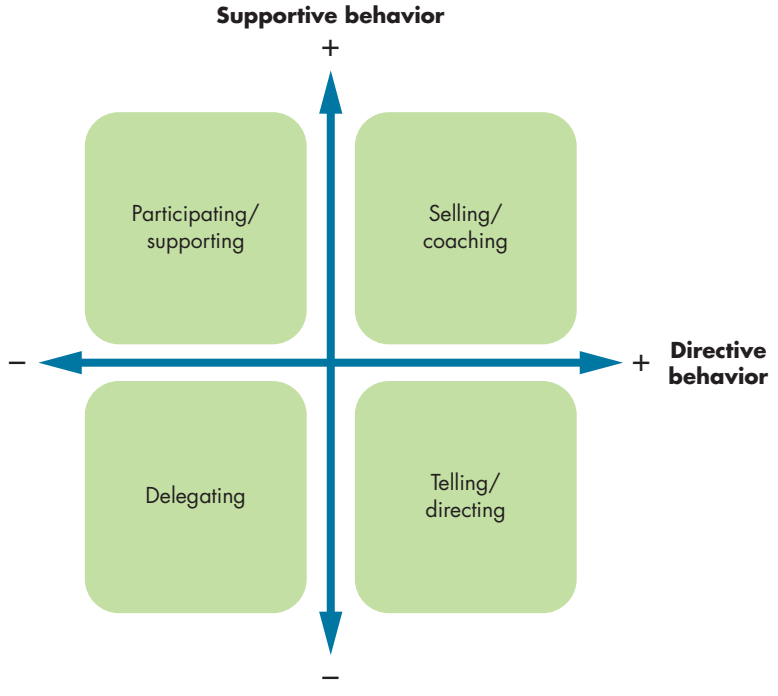
Similar to the Fiedler model, Hersey and Blanchard's **situational leadership theory (SLT)** also assumes that the effectiveness of any leadership style depends on the situation and tasks involved.[49] However, SLT moves beyond Fiedler to

situational leadership theory (SLT)
A contingency theory that suggests the appropriate leadership style depends on followers' readiness (e.g., willingness and competence) to accomplish a specific task.

focus on the followers. It says that successful leadership depends on selecting the right leadership style contingent on the followers' *readiness*, the extent to which followers are committed toward and competent in accomplishing a specific task. Leadership styles represent different combinations of supportive and directive behavior, which closely align with the consideration and initiating structure behaviors described earlier. A leader should choose one of four styles depending on follower readiness, which progresses on a continuum based on experience with the task, as shown in Exhibit 12-2:[50]

- **Telling/directing** (used when followers are not quite competent, but are committed to do the task): The leader gives clear and specific directions on what to do and how to do it.
- **Selling/coaching** (used when followers have demonstrated some competence but are not quite committed or motivated to do the task—they are discouraged because they realize how far they have to go): The leader should continue to give clear and specific directions on what to do and how to do it but also should provide support, socio-emotional feedback, and encouragement and convince the employee that the task is worthwhile.
- **Participating/supporting** (used when followers are competent but have variable commitment to do the task—they worry about additional responsibility or feel insecure): Given the employee's acquired competence at the task, the leader should take a step back and no longer be as directive—but should continue to be supportive and provide encouragement.
- **Delegating** (used when followers are competent and committed to do the task): The employee is now fully capable and committed to the task—they can now be delegated the task and left alone to get it done.

Exhibit 12-2 Manager Leadership Styles by Behavior in Situational Leadership Theory



Source: Based on K. H. Blanchard, D. Zigarmi, and R. B. Nelson, "Situational Leadership After 25 Years: A Retrospective," *The Journal of Leadership Studies*, 1, no. 1 (1993): 21–36; and G. Tortorella and F. Fogliatto, "Implementation of Lean Manufacturing and Situational Leadership Styles: An Empirical Study," *Leadership & Organization Development Journal* 38, no. 7 (2017): 946–68.

SLT has intuitive appeal. It acknowledges the importance of followers and builds on the logic that leaders can adapt to their followers' readiness to accomplish specific tasks. Yet research efforts to test and support the theory have generally been disappointing.[51] Why? Possible explanations include internal ambiguities and inconsistencies in the model itself[52] as well as problems with research methodology. Despite its intuitive appeal and wide popularity, any endorsement must be cautious for now.

Follower Contingency Theories

The final contingency theories we cover concern the role that followers play. As one leadership scholar noted, "Leaders do not exist in a vacuum"; leadership is a symbiotic relationship between leaders and followers.[53] But the theories we have covered to this point assume that leaders use a homogeneous style with everyone in their work unit. Think about your experiences in groups. Did leaders often act very differently toward different people? Here, we discuss three theories that highlight the role of followers in shaping leader effectiveness: the leader–participation model, shared leadership, and followership.

Leader–Participation Model The **leader–participation model** relates leadership behavior to subordinate participation in decision making.[54] Like the previous contingency theories we have discussed, this theory suggests that leader behavior must adjust to reflect the task structure (such as routine, nonroutine, or in between) and the demands of the situation.[55] However, it does not cover all leadership behaviors and is limited to recommending what types of decisions might be best made with subordinate participation and shared responsibility. It lays the groundwork for the situations and leadership behaviors most likely to elicit acceptance from subordinates and serves as a precursor to shared leadership theory (which we discuss next). For example, Steve Kerr, coach of the Golden State Warriors, notes that it is not enough to be a leader and manage the players—he relies on them to be involved and set examples as well when the situation calls for it.[56]

leader–participation model A theory that suggests leaders should determine the extent to which leadership problems involve participation and shared responsibility with followers (and adjust accordingly).

Shared Leadership Theory As suggested by the leader–participation model, sometimes the situation calls for followers to play an active role in the decision making that affects the team, work group, or unit. **Shared leadership theory** takes this idea a step further to suggest that leadership can become an emergent state (see the chapter on teams) in which leadership roles are distributed across followers, and all are capable of influencing one another.[57] Notably, shared leadership shifts the assumption that leadership is something enacted by *one person* to a broader understanding of leadership that is capable of being enacted by *a collective*.

shared leadership theory A theory that suggests leadership can become an emergent state in which leadership roles are distributed across followers and all are capable of influencing one another.

Shared leadership is possible in teams and groups with a strongly held shared purpose, flexible roles, composed of proactive and functionally diverse members and in an environment characterized by social support, autonomy, and psychological safety.[58] Moreover, it is less likely to occur directly after a team forms (when members are still navigating the new structure) and toward the end of a team's tenure (when teamwork and processes are "wrapping up").[59] Reviews of the research on shared leadership suggest that, overall, shared leadership is effective at improving team performance, attitudes, and behaviors, especially when members engage in transformational or charismatic practices (see later in this chapter) and when the team tasks are complex.[60] This is because shared leadership can help build trust, empathy, and cohesion among members, which can help them become more effective as a team.[61] Shared leadership can also lead to creativity and innovation benefits, as followers are more likely to support

one another during the idea generation process, derive a sense of purpose and meaning from working together creatively, and be well equipped to make these ideas a reality.[62]

Of all the contingency theories discussed so far, shared leadership theory has been one of the most popular in recent years. It is not strictly a contingency theory as shared leadership could be a relatively permanent fixture of a team or group. However, we classify it as such because followers step up to the ever-changing leadership problems and challenges confronting teams in a way that best suits their ability levels and strengths.[63] Shared leadership could be especially useful in teams operating within extreme, volatile contexts. For instance, medical teams in emergency trauma centers often share leadership responsibilities in an almost improvisational way—when a problem comes up, leadership responsibilities are quickly delegated to the members of the team most suited to address those problems.[64] However, shared leadership is not always beneficial. It can lead to both task and relationship conflict when the members who make up the group (and share leadership) operate from different levels of power (see the next chapter on power and politics).[65]

Followership Theory Like the contingency theories we have discussed so far, followership theory places a heavy emphasis on followers in affecting the success of leadership. In many ways, **followership** "flips the leadership script" to focus on the follower's capability to put into practice a leader's vision or set of goals (compare with our definition of leadership from earlier).[66] Therefore, the success of a leader depends heavily on the quality and makeup of the followers they are attempting to influence toward a common goal or visions. Moreover, the leader's emotion and behavior can be affected or influenced by followers: Engaged followers can lead to engaged leaders; exhausted followers can lead to exhausted leaders.[67]

followership The capability of followers to put into practice a leader's vision or set of goals.

A key element of followership theory is perception—much like what we have discussed so far with leadership. In other words, people's perceptions of what makes for ideal follower traits and behavior matter in the same way they do for leaders.[68] So what makes for an excellent follower?[69] Research suggests that the ideal follower is an industrious, enthusiastic, "good citizen" or "team player." These followers can be described as hardworking, productive, excited, outgoing, happy, loyal, and reliable. They are also more likely to engage in organizational citizenship behaviors (OCBs)—going above and beyond. A poor follower is one who is prone to insubordination, incompetence, and conformity. Followers who are easily influenced, follow trends, and do not speak up when the time calls for it can lead to stagnation in the group. Furthermore, arrogant, rude, or ill-tempered followers can cause or exacerbate relationship conflict that gets in the way of the vision or goals of the group. Lastly, if the followers are not equipped to make the dream a reality (e.g., they lack the knowledge, skills, abilities, or experiences required), they can be a detriment to the leader's vision. Ultimately, these perceptions matter for perceptions of *both* follower *and* leader performance,[70] especially when the way in which followers present themselves is authentic.[71]

Moreover, "managing up" has become a recent buzzword in the popular press[72] but possesses many parallels with followership theory. However, this concept expands followership to focus on the same types of skills managers and leaders use to influence followers and directs them upward toward leaders themselves. The idea is for followers to appreciate and adapt to leaders who have different perspectives, learn to navigate and influence them toward the good of the team, and figure out how to forge a productive working relationship.[73] Followership and "managing up" are both relatively new

concepts, but we expect OB to continue to move in the direction of understanding what makes followers "tick" and how they can be effective in teams and organizations.

Leading in Times of Crisis

A popular English proverb states, "Cometh the hour, cometh the man." Despite its sexist phrasing,[74] this proverb suggests that during times of crisis, leaders will emerge to bring order and understanding to the chaos.[75] Indeed, leaders can and do emerge during times of crisis, although there is variability in how effective they are at handling this contingency. For example, during the COVID-19 outbreak of 2020, German Chancellor Angela Merkel was praised for her impressive, decisive, firm, evidence-based, and effective leadership. And these are not merely attributions—under her leadership, Germany had one of the lowest fatality rates in the world when the virus broke out.[76] During times of peace and stability, women leaders tend to under-emerge due to the *glass cliff* phenomenon (see the chapter on diversity, equity, and inclusion in organizations for more discussion).[77] Because of this *think crisis-think female* effect, women are not seen as leaders during status quo periods, often due to leader stereotypes of not being agentic enough that prevent their emergence (despite little evidence indicating that they are more or less effective than men).[78] This phenomenon is just one of the many indicators that leadership in crisis is not as simple as the "cometh the hour" proverb would suggest—not to mention the time pressure, complexity, and strain from the threat these stressful situations impose.[79]

Leaders in times of crisis, such as decorated combat heroes of World War II, are often thought of in mythical, heroic terms: eager, loyal, risk-taking, transformational, and so on.[80] Interestingly, one review of historical leadership incidents across several decades suggested that much of the successful leadership episodes involved *transactional* behaviors (as defined later in this chapter), such as strategizing (e.g., analyzing the situation, delegating, planning) and coordinating (e.g., orchestrating action, managing information flow).[81] Analyzing the situation appears to be particularly important, and research demonstrates that leaders managing crisis teams move quickly toward a shared mental model (see the chapter on teams) of the crisis with followers over time.[82] Emotions also play a large role: For example, in one study, a leader responsible for a product recall that cost an organization a lot of money was rated more favorably when accepting responsibility and expressing sadness (as opposed to denial and anger).[83]

Of all the leadership styles during times of crisis, charismatic leadership has been studied the most frequently. During times of crisis, charismatic leadership can be *visionary* (e.g., starting with establishing a vision and then making a plea for action) or *crisis-responsive* (e.g., starting with a plea for action and, over time, justifying this action by communicating its effective results).[84] Both forms can be effective in different ways, although the crisis-responsive approach tends to be used less frequently once the crisis ends.[85] Followers are also highly attuned to the crisis, and this affects their leadership attributions. For example, analyses of presidential elections suggest that perceptions of crisis predict voters' attributions of candidate charisma and their intentions to vote for candidates who are charismatic.[86] The effects of charismatic and transformational leadership during times of crisis may even reverberate after the crisis is over. For example, a study of U.S. Army unit leaders suggests that transformational leaders observe less unit turnover after the crisis is over and that these soldiers feel more embedded in their unit due to their shared experiences.[87]

Positive Leadership Styles and Relationships

12-4 Describe the positive leadership styles and relationships.

The understanding of leadership is a constantly evolving science. In recent years, contemporary theories have focused on the positive ways in which leaders influence and build quality exchange relationships with their followers. First, we describe leader–member exchange (LMX) theory, which describes how leaders form unique relationships with each of their followers. Then we describe charismatic leadership and full-range leadership theory, which attempt to characterize the positive ways in which leaders capture followers' attention and motivations.

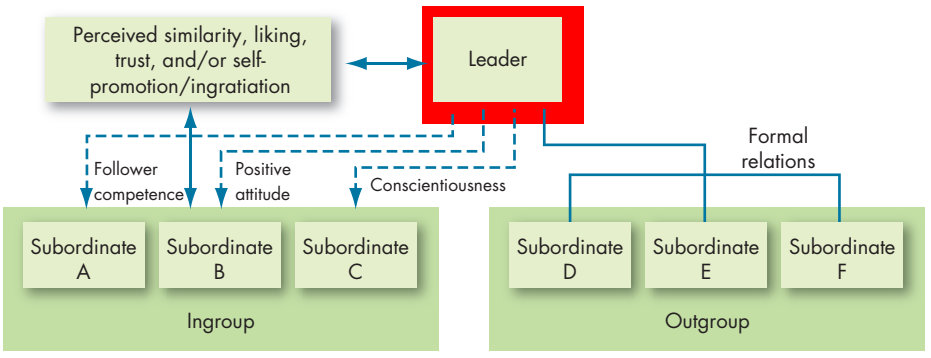
Leader–Member Exchange (LMX) Theory

leader–member exchange (LMX) theory
A theory that suggests (1) leaders and followers have unique relationships that vary in quality and (2) these followers comprise ingroups and outgroups; subordinates with ingroup status will likely have higher performance ratings, less turnover, and greater job satisfaction.

Think of a leader you know. Does this leader have favorite followers who make up their "ingroup"? If you answered yes, you are acknowledging **leader–member exchange (LMX) theory**.[88] LMX suggests leaders and followers have unique, one-on-one relationships that vary with each follower (e.g., some are higher quality than others). It also suggests that leaders establish a special relationship with a small group of their followers. These individuals make up the ingroup—they are trusted, get a disproportionate amount of the leader's attention, and are more likely to receive special privileges. Other followers fall into the outgroup.

For the relationship to remain intact, the leader and the follower must invest in the relationship (see Exhibit 12-3). Competent, conscientious, proactive, and positive employees tend to have higher-quality relationships with their leaders and are more likely to be placed in the ingroup (along with those who are ingratiating and self-promoting).[89] Leaders induce higher-quality LMX perceptions by engaging in emotional labor, transformational leadership behaviors, ingratiating their followers, rewarding employees with whom they want a closer linkage, and punishing those with whom they do not.[90] When leaders and followers interact with one another, research suggests that leaders and followers build social capital with one another—they contribute more to the relationship when they feel obligated to and will withhold contribution when they believe they have "done enough."[91] In general, however, leaders and followers tend to develop high-quality relationships over time when the supervisor has high expectations for the follower, when they see themselves as similar, when they like each other, and when they trust each other.[92] Leaders and followers of the same gender tend to have closer (higher LMX) relationships than those of different

Exhibit 12-3 Leader–Member Exchange Theory



genders.[93] Regardless of LMX quality perceptions, it is also true that LMX more or less varies in importance for leaders and followers. (Some employees value LMX less than others.)[94]

Research to test LMX theory has been generally supportive, with substantive evidence that leaders do differentiate among followers. These disparities are far from random. Followers with ingroup status receive higher performance ratings (and objectively perform better), engage in more helping or OCBs at work, engage in fewer deviant or counterproductive work behaviors (CWBs), speak up when the situation calls for it, and report greater satisfaction with their leaders.[95] LMX influences these work outcomes by improving employee trust, motivation, empowerment, and job satisfaction (although trust has the largest effect).[96] LMX is strongly linked to psychological and physical well-being at work as well as reduced stress and burnout symptoms—for instance, followers are less likely to feel ostracized or left out.[97] LMX has even been linked to enhanced employability and career success, with employees with strong LMX reporting higher salaries, bonuses, and promotions than other employees.[98]

Furthermore, the extent to which leaders "play favorites" and create explicit in- and outgroups tends to have a negative effect on group or team outcomes. Although LMX only has a weak effect on group performance, when leaders play favorites, it negatively affects team attitudes, collective efficacy, justice climate, and coordination and can lead to conflict in teams.[99] But this does not seem to be the case when the exchanges are based on team members' actual performance (and not just playing favorites).[100] On the other hand, the overall level of LMX quality among members of the team (how strongly followers tend to see their relationships with their leaders) tends to matter more for work group or team outcomes.[101] In other words, if the leader treats everyone well to some degree, followers will likely be happy. Similar to substitutes for leadership theory (discussed later in the chapter), the quality of exchange between coworkers and colleagues can often substitute for or offset the negative impacts of low LMX in teams.[102]

There are some boundary conditions for the effects of LMX, however. For example, it appears as if LMX's relationship with perceptions of trust, job satisfaction, and justice as well as with OCBs and turnover intentions depends in part on the culture—in a study of nearly 70,000 employees from twenty-three countries, the researchers found that LMX matters more in individualistic rather than collectivistic cultures.[103] Another limitation is that the agreement between leaders and followers on their relationship quality (e.g., a boss might think the relationship is great, the follower might not) is not very strong—when there is disagreement between the two, this can hurt employee engagement (regardless of who perceives the relationship as stronger).[104]

Charismatic Leadership

There is just "something" about certain leaders that causes people to be drawn toward them. There is an undeniable presence to leaders like Rev. Martin Luther King Jr., Mahatma Gandhi, and former president Barack Obama, which can be explained in part by their abilities to unite and transform people.[105] Two contemporary leadership theories—charismatic leadership and transformational leadership (to be discussed shortly)—share a common theme in the great leader debate: They view leaders as individuals who inspire followers through words, ideas, and behaviors.

What Is Charismatic Leadership? Sociologist Max Weber defined *charisma* (from the Greek for "gift") as "a certain quality of an individual personality, by virtue of which [they are] set apart from ordinary people and treated as endowed



Nick Woodman, founder and CEO of digital camcorder company GoPro, is a charismatic leader: energetic, enthusiastic, optimistic, confident, and extroverted. Woodman's charisma inspires his employees to work toward GoPro's vision of enabling people to share their lives through photos and videos.
Source: Victor J. Blue/Bloomberg/Getty Images

with supernatural, superhuman, or at least specifically exceptional powers or qualities. These are not accessible to the ordinary person and are regarded as of divine origin or as exemplary, and on the basis of them the individual concerned is treated as a leader."[106]

charismatic leadership theory
A leadership theory stating that followers make attributions of heroic or extraordinary leadership abilities when they observe certain behaviors (e.g., those that are values-driven, symbolic, or emotional).

According to **charismatic leadership theory**, followers attribute heroic or extraordinary leadership abilities when they observe certain behaviors (e.g., those that are values-driven, symbolic, or emotion-laden) and tend to give these leaders power.[107] A number of studies have attempted to identify the characteristics of charismatic leaders: They have a vision, have a sense of mission, are willing to take personal risks to achieve that vision, are sensitive to follower needs, and exhibit extraordinary behaviors (i.e., they "go against the flow")[108] (see Exhibit 12-4). Some research has also linked intelligence (both cognitive ability and being able to "see the big picture"), extroversion, and agreeableness to the motivational and influential factors of charismatic leadership.[109] Charismatic leadership theory suggests that these personality traits enable leaders to react to work events with a positive attitude, and their EI enables them to influence followers to unite and constructively confront the adverse work event.[110]

Exhibit 12-4 Key Characteristics of Charismatic Leaders

1. *Vision and articulation.* Has a vision—expressed as an idealized goal—that proposes a future better than the status quo; able to clarify the importance of the vision in terms that are understandable to others.
2. *Personal risk.* Willing to take on high personal risk, incur high costs, and engage in self-sacrifice to achieve the vision.
3. *Sensitivity to follower needs.* Perceptive of others' abilities and responsive to their needs and feelings.
4. *Unconventional behavior.* Engages in behaviors that are perceived as novel and counter to norms.

Source: Based on J. A. Conger and R. N. Kanungo, *Charismatic Leadership in Organizations* (Thousand Oaks, CA: Sage, 1998), 94.

How Charismatic Leaders Influence Followers Charismatic leadership has a positive effect on follower outcomes: Such leaders can, for instance, enhance follower task performance and OCB as well as reduce/reframe follower turnover and stressors.[111] But how do charismatic leaders influence followers? By articulating an appealing **vision**, a long-term strategy for attaining a goal by linking the present with a better future for their team, group, or organization.[112] Desirable visions fit the times and circumstances as well as reflect the uniqueness of the organization. Thus, followers are inspired not only by how passionately the leader communicates and their nonverbal cues (e.g., extended eye contact)[113] but also by an appealing message. For example, charismatic principals that promote a shared vision among teachers can improve the organizational climate (see the chapter on organizational culture) and, as a result, improve school outcomes.[114]

vision A long-term strategy for attaining a goal or goals.

A vision needs an accompanying **vision statement**, a formal articulation of an organization's vision or mission.[115] Charismatic leaders may use vision statements to imprint on followers an overarching goal and purpose. These leaders also set a tone of cooperation and mutual support. They build followers' self-esteem and confidence with high performance expectations and the belief that followers can attain them.[116] Through words and actions, the leader conveys a new set of values and sets an example for followers to imitate. Finally, the charismatic leader engages in emotion-inducing and often unconventional behavior to demonstrate courage and conviction about the vision.

vision statement A formal articulation of an organization's vision or mission.

Research indicates that charismatic leadership works as followers "catch" the emotions that their leader is conveying.[117] Notably, charismatic managers may seem to have an air of mystique and magnetism around them: These perceptions are aroused when they seem to be successful for mysterious reasons and when the effects of their charisma spread across followers.[118] Some personalities are especially susceptible to charismatic leadership.[119] For instance, an individual who lacks self-esteem or has low core self-evaluations is more likely to absorb a leader's direction. For these people, the situation may matter much less than the charismatic qualities of the leader.

Does Effective Charismatic Leadership Depend on the Situation? Charismatic leadership has positive effects across many contexts. However, there are characteristics of the situation that enhance or somewhat limit its effects. One factor that enhances charismatic leadership is stress. People are especially receptive to charismatic leadership when they sense a crisis or when they are under stress, perhaps because we think bold leadership is needed. Some of it, however, may be more primal. When people are psychologically aroused, even in laboratory studies, they are more likely to respond to charismatic leaders, especially when they use language that is constructive and "promotion-oriented" rather than that which does not propose solutions and focuses on the negative.[120] Stress matters for leaders, too: When leaders are under stress, they may not have the resources to engage in charismatic behaviors.[121] Stress may explain why, when charismatic leaders surface, they are likely to be in politics or religion, during wartime, or when a business is in its infancy or facing a threatening crisis. For example, U.S. President Donald Trump (despite the controversy and divisiveness surrounding his presidency) offered a charismatic vision to "make America great again," which was met with open arms by many, possibly due to a state of alarm or crisis nurtured and encouraged by the media.[122] Another factor is ambiguity: When we cannot accurately assess or observe how someone is doing, we rely more on cues (e.g., charismatic behaviors) to assess whether they are being effective as a leader. For example, one study of both U.S. presidents and CEOs found that charisma was more likely to predict whether a leader is selected or appointed, especially when the situation was ambiguous.[123]

The Dark Side of Charismatic Leadership Unfortunately, charismatic leaders who are larger than life do not necessarily act in the best interests of their organizations

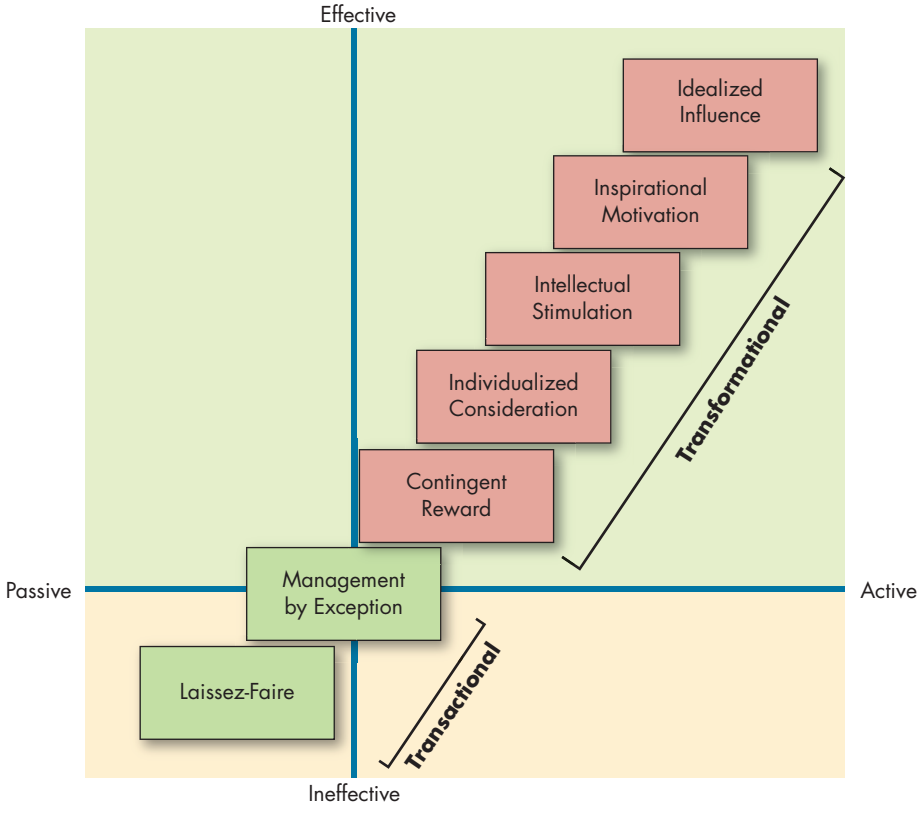
or constituents.[124] Research has shown that individuals who are narcissistic are also higher in some behaviors associated with charismatic leadership.[125] Furthermore, research suggests that charismatic leadership can unduly distort follower fairness perceptions: Because they see the charismatic leader in a positive light, they may be (consciously or not) more willing to perceive them as fair.[126] In essence, charismatic leadership is a positive leadership tool that can be used for nefarious means. Many charismatic—but corrupt—leaders have allowed their personal goals to override the goals of their organizations. Corporate leaders around the globe recklessly used organizational resources for their personal benefit and unethically violated laws to inflate stock prices, and then cashed in millions of dollars in personal stock options. For instance, the leaders at blood-testing firm Theranos and trucking startup Nikola lied about the capabilities of its technology but convinced investors of the technology's ingenuity and impact.[127] It is not that charismatic leadership is not effective; overall, it is. But a charismatic leader is not always the answer. Success depends on the situation, on the leader's vision, and on the organizational checks and balances in place to monitor the outcomes.

The Full Range Leadership Model

full range leadership model A model that suggests that there are a number of approaches or styles of leadership (i.e., transactional, transformational) that vary on a continuum from passive and ineffective to active and effective.

The **full range leadership model** suggests that there are a number of approaches or styles of leadership (i.e., laissez-faire, transactional, and transformational) that vary on a continuum from passive and ineffective to active and effective. Exhibit 12-5 illustrates the full range leadership model, and Exhibit 12-6 outlines characteristics of each of the model's seven leadership styles.

Exhibit 12-5 Full Range Leadership Model



Source: Adapted from B. M. Bass and B. J. Avolio, *Improving Organizational Effectiveness Through Transformational Leadership* (Thousand Oaks, CA: Sage, 1994).

Exhibit 12-6 Characteristics of Full Range Leadership Styles

Laissez-Faire Leader

Laissez-Faire: Abdicates responsibilities, avoids making decisions.

Transactional Leader

Contingent Reward: Contracts exchange of rewards for effort, promises rewards for good performance, recognizes accomplishments.

Management by Exception (active): Watches and searches for deviations from rules and standards, takes corrective action.

Management by Exception (passive): Intervenes only if standards are not met.

Transformational Leader

Idealized Influence: Provides vision and sense of mission, instills pride, gains respect and trust.

Inspirational Motivation: Communicates high expectations, uses symbols to focus efforts, expresses important purposes in simple ways.

Intellectual Stimulation: Promotes intelligence, rationality, and careful problem solving.

Individualized Consideration: Gives personal attention, treats each employee individually, coaches, advises.

Source: B. M. Bass, "From Transactional to Transformational Leadership: Learning to Share the Vision," *Organizational Dynamics* 18, no. 3 (1990): 19–31.

Laissez-Faire Leadership Let us start with the most ineffective leadership style. According to a survey by Right Management, only 17 percent of employees report that their supervisors are actively engaged in developing them, yet 68 percent report that their supervisors are not engaged in this way at all.[128] Those in the 68 percent likely have leaders who primarily use laissez-faire leadership styles. **Laissez-faire leadership**, which literally means "let it be" (or "do nothing") in French, is the most passive and therefore least effective of leader behaviors.[129] Although laissez-faire leadership is passive, its effects are not also passive.[130] Contrary to what you might predict, members of a team led by a laissez-faire leader generally do not "step up" to fill the leadership void. Instead, in line with social learning theory (see the chapter on motivation theories), team members tend to also neglect leadership behaviors, which then harms team performance, mirroring their passive leader's behavior.[131] Laissez-faire leaders also can do emotional harm to their followers. For instance, many followers often define themselves through their relationships with others, including their supervisors. For these employees, a passive, laissez-fair leader makes them feel like there is low-quality LMX and may lead them to experience lower commitment toward the organization.[132] This has particular implications for followers who experience bullying or mistreatment—supervisors who "do nothing" can encourage role conflict and ambiguity, relational conflicts, mistreatment, and stressful working environments.[133]

laissez-faire leadership A leadership style involving passive abdication and avoidance of leadership responsibilities.

Transactional Leadership **Transactional leaders** guide their followers toward established goals by clarifying role and task requirements, allocating rewards and punishment where needed (i.e., *contingent rewards*), and (passively or actively) intervening when the situation calls for it (i.e., *management by exception*).[134] The types of transactional leadership are presented in Exhibit 12-6. *Management by exception*, in which leaders primarily "put out fires" during crises,

transactional leaders Leaders who guide or motivate their followers in the direction of established goals by clarifying role and task requirements, allocating rewards and punishment where needed, and (passively or actively) intervening when the situation calls for it.

monitor employee performance for errors, and interact with followers only when something is wrong, is generally ineffective as a style of leadership.[135] Notably, management by exception can be utilized either actively or passively, with the passive form tending to be more ineffective.[136] *Contingent reward* leadership, which gives predetermined rewards for employee efforts, can be an effective style of leadership but will not get employees to go above and beyond the call of duty.[137]

Some of the leadership approaches we discussed earlier, including situational leadership theory, tend to focus on a transactional approach. Sometimes, transactional leadership approaches are needed.[138] For example, research on offshore rig employees suggests that leaders who actively intervene when the situation calls for it lead employees to become more engaged in safety behaviors, especially given the high likelihood of accidents.[139]

transformational leaders Leaders who inspire followers to transcend their own self-interests for the good of the organization.

Transformational Leadership **Transformational leaders**, on the other hand, inspire followers to transcend their self-interests for the good of the organization.[140] Transformational leaders can have an extraordinary effect on their followers.[141] In her book *Leadership in Turbulent Times,* Doris Kearns Goodwin describes the transformational qualities of past presidents such as Abraham Lincoln, Theodore Roosevelt, and Lyndon Johnson, who personally appealed to Americans and inspired followers to make sacrifices to pursue goals for the country.[142] There is evidence that whether leaders engage in transformational behaviors depends to a large extent on culture and industry. For example, one review of dozens of studies from 18 different countries suggests that transformational leadership may be used more often in the health and security industries as well as in cultures worldwide that value assertiveness and egalitarianism and are lower on power distance.[143]

Exhibit 12-6 briefly identifies and defines characteristics of transformational leadership styles. Individualized consideration, intellectual stimulation, inspirational motivation, and idealized influence (known as the "four I's") all result in extra effort from workers, higher productivity, higher creativity, higher well-being, higher morale and satisfaction, higher organizational effectiveness, higher psychological safety (and follower freedom to speak up when needed), improved psychological and physical health, lower turnover, lower absenteeism, and greater organizational adaptability.[144]

Integrating and Evaluating Positive Leadership Styles

First, one clear conclusion can be drawn regarding laissez-faire leadership: You probably should not use it. Laissez-faire leadership, or doing nothing (often when something *should* be done), mostly results in destructive outcomes like social loafing, harmed interpersonal relationships, and the perpetuation of toxic group or work environments. However, a comparison between charismatic, transactional, and transformational styles is somewhat trickier. Although all of these styles can be useful in their own right, transformational leadership tends to consistently result in optimal leadership outcomes. Therefore, in this section, we primarily focus on how charismatic and transactional leadership stack up to transformational leadership.

Transformational Versus Charismatic Leadership First, in considering transformational and charismatic leadership, you surely noticed some commonalities. There are differences, too. As discussed in a prior section, charismatic leaders are those who make value-based appeals and communicate through

symbolic and emotion-laden means.[145] Charismatic leadership places somewhat more emphasis on the way leaders communicate (are they passionate and dynamic?), while transformational leadership focuses more on what they are communicating (is it individualized, intellectually stimulating, inspirational, and influential?).[146] At their heart, both focus on the leader's ability to inspire followers, and sometimes they do so in the same way and with similar degrees of effectiveness.

Transformational Versus Transactional Leadership Transactional and transformational leadership complement each other; they are not opposing approaches to getting things done.[147] Transformational leadership *builds on* transactional leadership and produces levels of follower effort and performance beyond what transactional leadership alone can do. Although both tend to be important, it appears that transformational leadership is more important for group performance, OCBs, and satisfaction with the leader, whereas transactional leadership (primarily contingent reward) is more important for leader effectiveness, follower performance, and follower job satisfaction.[148] Also, as mentioned earlier, transactional leadership behaviors, like management by exception (active), are also important in their own right for effective task performance and safety behaviors in organizations.[149]

Many researchers have commented on how the *contingent reward* aspect of transactional leadership appears to be *just as effective as* many of the transformational approaches to leadership, although the management by exception approach does lag behind in effectiveness.[150] Interestingly, newer research suggests that management by exception may be a double-edged sword—it has both pros and cons, which offset each other.[151] When managers actively or passively monitor followers and only step in when they are needed, followers may feel empowered to do their jobs autonomously (e.g., they are not being micromanaged). This can lead to heightened task performance and OCBs. However, at the same time, these employees may also feel like they have lower-quality LMX relationships with their leaders. If their leaders are only stepping in when there is a problem, they are probably not engaging in relationship-building behaviors, which can harm their LMX, performance, and OCBs. These findings highlight just how important the situational approach is to effective deployment of these styles: Always be mindful of situational demands and the leadership styles that may be most effective in meeting those demands, and work toward addressing unintended side effects of the leadership style you choose.

What Makes Transformational Leadership So Great? Overall, an exhaustive program of research has sought to discover why transformational leadership is so effective.[152] In general, researchers have found that it is, effective for five reasons (many of which correspond with various chapters in this book):[153]

1. **Affective or attitudinal mechanism:** Transformational approaches promote positive employee moods, emotions, job satisfaction, organizational commitment, and feelings of well-being.
2. **Motivational mechanism:** Transformational approaches motivate employees—they become more confident and engaged and are more willing to put in the time and effort.
3. **Identification mechanism:** Transformational approaches lead employees to personally identify with the leader and the leader's values and identity as well as the team or organization.

4. **Social exchange mechanism:** Transformational approaches improves the quality of exchange and relationship between leaders and followers (i.e., LMX; see earlier in this chapter). Followers are also more likely to perceive that they are supported by the leader, team, and/or organization.
5. **Justice enhancement mechanism:** Transformational approaches improve employee fairness perceptions, motivating followers to contribute more and to trust the leader, team, and organization more.

Research suggests that the "social exchange mechanism" is the primary "reason" for why leadership behaviors and styles influence outcomes: Behaviors that improve perceptions of leader–follower relationship quality (e.g., LMX), in turn, result in improved follower performance.[154] Although the other reasons are just as important, it seems as if they operate *through* improved social exchange and LMX. In other words, (1) transformational leadership approaches improve the leader–follower relationship; (2) *then* this improved relationship paves the way for positive affective, attitudinal, motivational, identification, and justice-related changes.

Are There Downsides to Transformational Leadership? In general, organizations perform better when they have transformational leaders. However, transformational leadership is not without its critics, some of whom boldly claim that transformational leadership behaviors can be construed as manipulative and unduly granting power to inspirational people.[155] Moreover, transformational leadership is not as "easy" as doing nothing or leading in more passive ways. Such leadership can take its toll on leaders, causing them to become emotionally exhausted and leave their leadership positions.[156] This is especially the case when followers are low on conscientiousness and competence.[157]

Others have noted that transformational leadership theory could benefit from understanding which dimensions are most important, exactly how these combine to form transformational leadership, and how the dimensions of transformational leadership lead to different outcomes.[158] More importantly, researchers have criticized the surveys with which transformational leadership is measured and suggest that transformational leadership is often confounded with outcomes. For example, do leaders give individualized attention, intellectually stimulate, inspire, and influence? Or is it that followers perceive they are given unique consideration, intellectually stimulated, inspired, or influenced? In other words, are these actual behaviors or merely desirable follower outcomes?[159]

The (Un)ethical Aspects of Leadership

12-5 Discuss the roles of leaders in creating ethical organizations.

Although the theories we have discussed so far have increased our understanding of effective leadership, they do not deal explicitly with the roles of ethics and trust, which are essential to complete the picture. In this section, we consider contemporary concepts that explicitly address the role of leaders in creating ethical organizations.

Authentic Leadership

authentic leadership A leadership style in which leaders "know who they are" (i.e., self-awareness), are anchored by their mission, consider others' opinions and all relevant information before acting, and display their true selves when interacting with employees.

Authentic leadership is practiced by leaders who are self-aware (e.g., they know what is important to them, including their own strengths/weaknesses), are anchored by their mission and principles, consider others' opinions and all relevant information before acting, and display their true selves when



Brad Smith is an authentic leader. As the former CEO and current chair of Intuit (one of the globe's biggest and most lucrative financial software companies), he is one of the most influential business leaders today, according to *Forbes*, and is known for his ethical practices. Smith has forged a culture where risk taking and learning from failures are not only tolerated but encouraged.
Source: Christopher Victorio/The Photo Access/Alamy Stock Photo.

interacting with employees.[160] The result: People have faith in them. For example, Nick Sarillo of Nick's Pizza and Pub is authentic in how he runs his business—when one of the locations was not doing too well, he was publicly open and transparent about the facts along with the need to close the store.[161]

Authentic leadership strongly predicts outcomes such as group performance, OCBs, LMX, satisfaction and trust in the leader, ratings of leader effectiveness, follower attitudes and empowerment, and, to a lesser degree, follower creativity, engagement, deviance, turnover intentions, and burnout.[162] Furthermore, research suggests that leaders who "practice what they preach" observe improved follower outcomes because their followers begin to trust them and become more committed to the organization.[163] Authentic leaders can inspire their employees to be better: For example, research on Pakistani communications employees suggests that the awareness of one's own strengths and weaknesses that comes from authentic leadership predicts followers' intentions to improve themselves.[164] Moreover, authentic leadership inspires followers to be authentic themselves, which in turn influences their job attitudes and behaviors.[165]

Unfortunately, there appears to be a double standard for women when it comes to authenticity: In general, women are perceived to be more authentic, especially when they engage in traditionally "feminine" hobbies and when they engage in "warm" leadership styles.[166] However, if they engage in more assertive, transactional approaches (e.g., initiating structure, directive leadership behaviors), this goes against the stereotype and may lead some to label them as inauthentic.[167] These stereotypes have led many to comment on how Hillary Clinton was mocked as "Saint Hillary" when she stood behind her message of "politics of meaning" in the 1990s but was branded as inauthentic when she adopted more traditionally masculine approaches to leadership during her presidential campaign decades later.[168] Ironically, having more women in corporate leadership positions (e.g., corporate boards) leads to *better* financial performance than if these positions were composed of all men.[169] This is true

for both accounting performance measures and market performance measures. Recent research even suggested that women's leadership was associated with fewer COVID-19 related deaths in the United States based on an analysis of women governors.[170]

Toward a Better World

The Institute for Corporate Social Responsibility (iCSR): Training Leaders to Work Toward a Better Tomorrow

Tamara Lucas Copeland (DEI consultant, former president of the Washington DC Regional Association of Grantmakers, and alumna of the Institute for Corporate Social Responsibility [iCSR]) suggests that CSR just does not "happen" on its own in organizations. It takes a collective effort, often at the hands of knowledgeable, skilled, and influential leadership. It takes a team learning together to develop a common skill set, making the business case for CSR activities, maximizing the impact of philanthropic funds raised, and effectively measuring success over time. Indeed, research suggests that CSR managers are often confronted with the onerous responsibility of influencing and inspiring other managers to care about CSR initiatives. As these authors put it, "This could be a struggle. . . interviewees emphasized that when middle managers were asked to incorporate new CSR practices in their day-to-day work and decision making, the typical response was that those tasks weren't in line with their financial goals." Training and development programs at universities, in the private sector, and in the public sector provide an opportunity for executives and professionals to develop these skills to guide their organizations toward socially responsible visions.

iCSR was launched in 2014 to provide practical training and development opportunities for leaders looking to develop their CSR leadership skills. iCSR is offered in partnership with the U.S. Chamber of Commerce Foundation's Corporate Citizenship Center. All graduates earn a certificate from the Johns Hopkins University in CSR en route. As of 2021, iCSR involves a virtual training program with two annual cohorts, each with about thirty-five students (to enhance meaningful engagement with the course content). Trainees meet for forty-five-minute Zoom sessions, network with other leaders, and take part in breakout discussions and debates. The faculty teaching these courses are well-respected CSR executives from well-known companies like American Express, Capital One, IBM, PwC, Marriott International, Qualcomm, and Viacom. Past participants have also been leaders from major corporations, such as Aetna, Bank of America, Cigna, and Deloitte, among other companies.

The iCSR curriculum focuses on a mix of developing leader behaviors and skills as well as authentic, ethical, and servant leadership approaches. Throughout the course, trainees learn about the overall context, history, and evolution of CSR and environmental sustainability. With this context in mind, trainees learn how to build internal buy-in and convince others of the value of CSR, how to frame CSR work to others, and how to leverage authentic leadership approaches. They also engage in values clarification exercises, learn how to build their ethical decision-making skills, and engage and build trust with stakeholders. iCSR trainees build their transactional leadership and initiating structure skills as well, learning how to develop internal policies and practices that support people and foster employee CSR-related volunteerism, training, and upskilling. They also learn how to network and influence others outside the organization by forging partnerships and philanthropic investment in CSR initiatives. Finally, attendees learn how to communicate the impact of CSR to stakeholders, executives, and consumers to influence and communicate the value of the organization's efforts.

But are these CSR leadership training and development programs effective? Research suggests that leaders' abilities, skills, and experiences play a crucial role in affecting both CSR strategy and effectiveness in organizations. Moreover, although attendees to these programs give glowing reviews of their experiences, more specific systematic research is needed on their effectiveness. However, preliminary research shows that these training programs *can be* effective, but the trainees and situation matter quite a bit. To make CSR leadership training programs most successful, training developers should emphasize a learning culture and climate, provide opportunities for peer learning and interaction among students, and shift trainees' motivations from proving or avoiding poor performance toward mastery of CSR skills.[173]

Despite these interesting findings concerning the nature of authentic leadership, reviews of the leadership literature point to how transformational and authentic leadership are extremely similar in practice, to the point where many researchers consider them to be identical.[171] However, some work does suggest that authentic leadership is more important for explaining team performance and whether employees engage in OCBs because they have an internalized mission that propels the group forward.[172]

(Un)ethical Leadership

(Un)ethical leadership, although it has been conceptualized in many ways, refers to how leaders serve as ethical role models to followers and thus demonstrate normatively appropriate (or inappropriate) behavior by using their power in (un)ethical ways and by treating others fairly (or unfairly).[174] (Un)ethical leadership tends to affect employees in a number of ways.[175] First, (un)ethical leadership has a direct influence on how employees think about moral issues and establishes an organizational culture with clear values and principles for what is (un)ethical behavior.[176] Second, ethical leadership sets the example for how employees should treat one another (therefore, reducing CWBs): It can lead employees to use less intimidation, justifications, and excuses for their behavior; it can empower employees to stand up and speak out in the face of injustice; and it can even improve customer service performance by clarifying moral reasons for treating customers right.[177] Third, ethical leadership tends to improve follower job attitudes and follower perceptions of leaders—indeed, ethical leadership tends to increase followers' trust in their leaders, which in turn can lead to these positive outcomes.[178] Lastly, ethical leadership has direct performance implications. It enhances task performance and OCB because it improves followers' relationship with leaders (i.e., LMX), establishes an ethical culture, and fosters organizational identification (see the chapter on job attitudes).[179]

(un)ethical leadership The idea that leaders serve as ethical role models to followers and thus demonstrate appropriate (or inappropriate) behavior by using their power in (un)ethical ways and/or by treating others fairly (or unfairly).

Unfortunately, (un)ethical leadership tends to run into similar criticisms as authentic leadership because it is hard to disentangle it from transformational leadership in practice.[180] Furthermore, it is hard to be consistently ethical: Leaders who were ethical on one day were more likely to be unethical the next day, often because of stressful circumstances, mental depletion, and a feeling that one has built up "credits" to behave in an unethical way.[181] However, followers do not necessarily act negatively to leader unethical behavior: If the followers' values align with the leader's and they have a sense of mutual trust, they may be more likely to continue to support the leader.[182] Furthermore, there are certain situations that reduce the effectiveness of ethical leadership. When there are too many followers, when the followers do not share the same moral perspectives as the leader (what if leaders and followers disagree on what is right and wrong?), and when followers are not in a state of mindfulness (see the chapter on health and stress), ethical leadership tends to be less effective at improving follower behaviors.[183] Although every member of an organization is responsible for ethical behavior, many initiatives aimed at increasing organizational ethical behavior are focused on the leaders.

When considering corporate scandals, like Wells Fargo's unethical sales practices in 2016, it is clear that ethics-based leadership is crucial at all levels of organizations.[184] Ethical top leadership influences not only direct followers but all the way down the command structure as well.[185] Ethical leadership also has implications for financial outcomes. For example, one study of 111 U.S. retail stores found that ethical leadership can reduce "retail shrink," or the loss of merchandise primarily due to theft and shoplifting, because ethical leadership can reduce incivility among employees and customers.[186]

Servant Leadership

servant leadership A leadership style marked by going beyond the leader's own self-interest and instead focusing on opportunities to help followers grow and develop.

Servant leadership involves going beyond self-interest to focus on opportunities that help followers grow and develop.[187] Characteristic behaviors include listening, empathizing, persuading, acceptance, stewardship, and actively developing followers' potential.[188] Because servant leadership is based on serving the needs of others, research has focused on its outcomes for the well-being of followers. Indeed, servant leadership is strongly related to follower job attitudes as well as their trust in leadership and LMX perceptions.[189] In turn, servant leadership predicts both job performance and OCB, albeit to a lesser degree than well-being and leadership quality.[190] This may be due to follower feelings of gratitude that engender prosocial behavior and a need to reciprocate.[191] Similar to authentic leadership, there appears to be an advantage for women who are servant leaders because the leadership style stereotypically matches the gender role prototype. In other words, women who draw on servant leadership techniques tend to inspire their use in their followers, which leads to higher performance than men servant leaders.[192]

Research also suggests that servant leadership may "fuel the service fire." Research on hairstylists suggests that servant leaders help promote their sense of identity with the salon and their confidence, which in turn leads customers to rate their performance more highly.[193] Furthermore, research suggests that there is a trickle-down effect: High-level managers who are servant leaders can influence low-level managers to practice servant leadership, which in turn improves employee performance.[194] Servant leadership is also beneficial during onboarding: Servant leadership may compensate for lower levels of new employee proactivity, as the servant leader takes the role in coaching the new employee.[195] Lastly, servant leadership may play a large role during major crises. For instance, a study of employees working at an IT firm in China during the COVID-19 surge found that servant leadership was crucial in transforming employees' anxieties and fears surrounding the virus into job engagement and socially responsible behavior.[196]

Although servant leadership is highly related to transformational, authentic, and ethical leadership (particularly the latter), research suggests that it holds the most promise "of standing on its own" as a unique leadership style in practice when compared with authentic and ethical leadership.[197]

Abusive Supervision

It can happen to anyone—we are all capable of being abusive as managers.[198] For instance, in a 2018 Monster poll of U.S. job seekers, 76 percent of respondents indicated that they currently have a toxic or abusive supervisor.[199] Abusive supervision is a concern worldwide given its negative implications for OB.[200] Although potentially a form of unethical leadership, **abusive supervision** refers to the perception that a supervisor is hostile in their verbal and nonverbal behavior (e.g., uncontrolled outbursts, public ridicule, inappropriate blaming).[201]

abusive supervision Supervision that is hostile both verbally and nonverbally.

Several factors are related to abusive supervision.[202] For one, nearly all forms of justice are negatively related to abusive supervision, suggesting that a sense of injustice is at the core of abusive supervision (especially for interpersonal justice).[203] Although some personality traits such as agreeableness and conscientiousness appear to be negatively (but weakly) associated with abusive supervision,[204] negative affect, narcissism, and poor self-control are strongly linked with it.[205] These negative affects often come from supervisors' own experiences of overload, emotional exhaustion, stress, and frustration—in fact, research shows that abusive supervision actually helps them cope with these negative emotions and become more engaged in their work as a result.[206] Recent research has also drawn on followership theory to focus on the characteristics of the

followers reporting abusive supervision. For instance, followers with negative worldviews are more likely to report that they experience abusive supervision.[207] Interestingly, both poor and high performers can become victims—poor performers can be berated for their alleged incompetence, and high performers can be berated out of jealousy or threat to the hierarchy.[208]

Abusive supervision comes with dire consequences.[209] First and foremost, abusive supervision negatively affects employee health: It leads to increased depression, emotional exhaustion, and lower self-esteem as well as dehumanization, ostracism, and job tension perceptions.[210] Second, it also leads to decreases in organizational commitment, job satisfaction, and perceived organizational support, along with increased work–family conflict.[211] Third, it can adversely affect employee performance and other employee behaviors. Victims of abusive supervision are more prone to engage in CWBs and other deviant behaviors (especially retaliatory ones directed toward their supervisors) and are less prone to engage in OCBs.[212] Finally, coworkers who observe abusive supervision are likely to fear that it may happen to themselves (or may believe that the group is not working hard enough) and work unduly harder as a result.[213] However, in units with ethical, collaborative cultures and climates, these employees may be more likely to reach out and help the victims and call out the abusive supervisors.[214]

Abusive supervision often occurs in cycles. When employees are the victims of abusive supervision, they tend to lash out at the organization and the supervisor by engaging in CWB and deviant behaviors, and the supervisor then continues to be abusive to the employees in retaliation.[215] You may be wondering why the employee would lash out at the organization as well when it was the supervisor who was the one being abusive. Additional research suggests that employees often blame the organization when they are abused and see the supervisor as a representative of the organization as a whole.[216] Furthermore, sometimes abusive supervision can "activate" employees' dark traits, such as how Machiavellian employees engage in unethical behaviors when their supervisors treat them abusively.[217] But primarily, the CWBs and deviant behaviors are attributable to the emotions they feel as a result of being mistreated (e.g., shame, anger, fear).[218]

But leaders can also adopt abusive approaches by *observing other leaders*, so the phenomenon is not solely unique to leader–follower relations. New leaders who look up to abusive supervisors as competent and who view these behaviors as effective (e.g., "what it takes to be a leader") are more likely to adopt these abusive behaviors.[219] Moreover, supervisors who merely talk about abusive supervision normalize the behavior to a degree, leading to further perpetuation of this destructive form of leadership.[220] On the other hand, new leaders with a strong moral identity who distance themselves from their supervisors are less likely to become abusive and can actually lead more ethically as a result.[221]

When it comes to the experience of being a victim of abusive supervision, your personality and coping strategies matter. Conscientious, resilient, self-regulating employees tend to be able to cope with the abuse better.[222] Furthermore, applications of followership theory focus on how followers can confront supervisor abuse to break the cycle. For instance, followers can manage the balance of power in the relationship to demonstrate to the supervisor that they are instrumental to their goals and vision.[223] But the onus should not entirely be on the abused to improve the situation—the primary responsibility lies in the leader. Thankfully, recent research suggests that leaders can be trained to support and avoid abusing their subordinates.[224] Abusive leaders often show guilt, shame, and sometimes lowered self-evaluations, which lead them to paradoxically perform constructive leader behaviors following episodes of abuse.[225] This does reduce the negative sting of abuse to some degree for followers, as long as these responses are authentic and not "two-faced."[226]

Leadership and Trust

12-6 Describe how leaders can have a positive impact on their organizations through building trust.

In each of the theories we have discussed, you can see opportunities for the practice of good, bad, or mediocre leadership. Now let us think about the intentional development of trust that results from positive leadership approaches.

Trust

trust A psychological state of mutual positive expectations between people—both depend on each other and are genuinely concerned for each other's welfare.

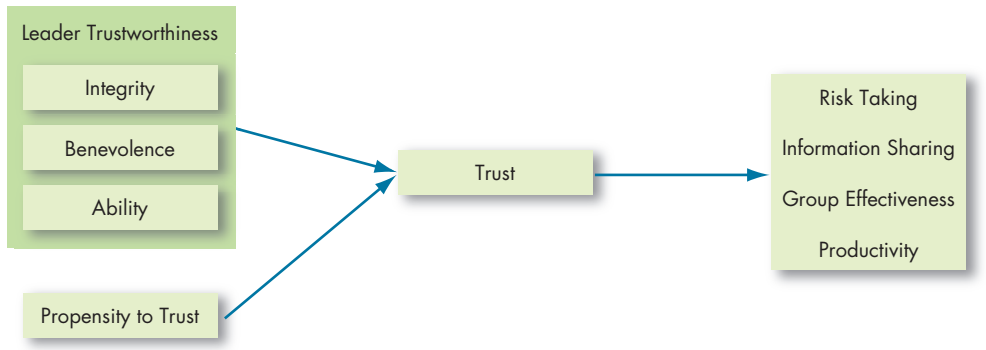
Trust is a psychological state of mutual positive expectations between people—both depend on each other and are genuinely concerned for each other's welfare.[227] Although you are not completely in control of the situation and sometimes under time pressure which *forces* you to trust another,[228] you are willing to take a chance that the other person will come through for you. Trust can be focused on *competence* (e.g., faith in the leaders' technical skills, experience, etc.) or *integrity* (e.g., faith in a leaders' motives, honesty, and character). So naturally, integrity-based trust is much more effective at reducing the costs associated with building new relationships (at least for establishing business connections between organizations).[229]

Trust is a primary attribute associated with leadership; breaking it can have serious adverse effects on a group's performance.[230] Followers who trust a leader are confident their rights and interests will not be abused.[231] Transformational leaders, for example, create support for their ideas in part by arguing that their direction will be in everyone's best interests. Leaders who trust their followers are confident that they will follow through and complete their duties effectively.[232] Felt trust matters as well—when the leader feels trusted and the followers trust the leader, leaders are more effective.[233] Furthermore, followers who feel trusted by their leaders become more engaged in their work because they feel they have been granted autonomy by their supervisors and because they feel heightened LMX perceptions.[234]

The Outcomes of Trust Trust between supervisors and employees has several specific advantages. Here are just a few from research:

- *Trust encourages taking risks.* Whenever leaders and employees decide to deviate from the usual way of doing things, or to take their supervisor's word on a new direction, they are taking a risk. In both cases, a trusting relationship can facilitate that leap.[235]
- *Trust facilitates information sharing.* One big reason employees fail to express concerns at work is that they do not feel psychologically safe revealing their views. When managers demonstrate that they will give employees' ideas a fair hearing and actively make changes, employees are more willing to speak out.[236]
- *Trusting groups are more effective.* When a leader sets a trusting tone in a group, members are more willing to help each other and exert extra effort, which increases trust. Members of mistrusting groups tend to be suspicious of each other, constantly guard against exploitation, and restrict communication with others in the group. These actions tend to undermine and can eventually destroy the group.[237]
- *Trust enhances productivity.* The bottom-line interest of companies appears to be positively influenced by trust. Employees who trust their supervisors tend to receive higher performance ratings, indicating higher productivity. People respond to mistrust by concealing information and secretly pursuing their own interests. [238]

Exhibit 12-7 The Nature of Trust



Trust Development What key characteristics lead us to believe a leader is trustworthy? Evidence has identified three: integrity, benevolence, and ability (see Exhibit 12-7).[239]

Integrity refers to honesty and truthfulness. When 570 white-collar employees were given a list of twenty-eight attributes related to leadership, they rated honesty the most important by far.[240] Integrity also means maintaining consistency between what you do and say (e.g., authenticity).

Benevolence means the trusted person has your interests at heart, even if your interests are not necessarily in line with their interests. Caring and supportive behavior is part of the emotional bond between leaders and followers.

Ability encompasses an individual's technical and interpersonal knowledge and skills. You are unlikely to depend on someone whose abilities you do not believe in even if the person is highly principled and has the best intentions.

Trust Propensity **Trust propensity** refers to how likely an employee is to trust a leader. Some people are simply more likely to believe others can be trusted.[241] Trust propensity is closely linked to the personality trait of agreeableness, and people with lower self-esteem are less likely to trust others.[242] When teams are composed of members with different propensities to trust leaders or other team members, they are more prone to spiral downwardly when conflict arises.[243] Certainty matters as well—when employees are certain that a leader is trustworthy (e.g., the leader has everything to lose by being untrustworthy) they have a higher propensity to trust that leader.[244]

trust propensity How likely an employee is to trust a leader.

Trust and Culture Does trust look the same in every culture? In the work context, trust in an employment relationship may be built on very different perceptions from culture to culture. For example, a study in Taiwan indicated that employees responded to paternalistic leadership when it is benevolent and ethical with increased trust.[245] This positive response to paternalism may be unique to the collectivistic context (see the chapter on diversity, equity, and inclusion in organizations) where the Confucian values of hierarchy and relationship predominate. In individualistic societies, we might expect that paternalistic leadership will rankle many employees who prefer to see themselves more as individuals. Employees in individualist cultures may build trust along dimensions of leadership support and consistency instead, for instance.

The Role of Time in Trust We come to trust people by observing their behavior over a period of time, such as when you are developing new relationships

with people when you start a new job.[246] For example, employees in newly acquired companies develop trust toward top managers in the acquiring company (especially when they institute fair procedures and when they are seen as competent).[247] To help, leaders need to demonstrate integrity, benevolence, and ability in situations where trust is important—say, where they could behave opportunistically or let employees down. Second, trust can be maintained by owning up to and apologizing for, not denying, making legitimate mistakes.[248] Third, research with one hundred companies around the world suggested that leaders can build trust by shifting their communication style from top-down commands to ongoing organizational dialogue.[249] Fourth, when leaders regularly create interpersonal conversations with their employees that are intimate, interactive, and inclusive, followers demonstrate trust with high levels of engagement.[250] Finally, followers can experience a breach of trust when leaders suddenly replace transformational leadership with laissez-faire leadership or when followers witness leaders' unethical behavior—this breach of trust can cause followers to rate leaders as less effective as a result.[251]

Regaining Trust Managers who break the psychological contract with workers, demonstrating they are not trustworthy leaders, will find employees are less satisfied and less committed, have a higher intention to leave the organization, engage in less OCB, and have lower levels of task performance.[252]

Once it has been violated, trust can be regained through long-term and short-term strategies,[253] but only in certain situations and depending on the type of violation.[254] If the cause is lack of ability, it is usually best to apologize and recognize you should have done better. When lack of integrity is the problem, apologies do not do much good. Regardless of the violation, saying nothing or refusing to confirm or deny guilt is never an effective strategy for regaining trust.[255]

Trust can be restored when we observe a consistent pattern of trustworthy behavior by the transgressor, although time is of the essence when issuing an apology: Quicker apologies tend to be better than those that come late.[256] However, if the transgressor used deception, trust never fully returns, not even after apologies, promises, or a consistent pattern of trustworthy actions.[257]

Challenges and Opportunities to Our Understanding of Leadership

12-7 Identify the challenges and opportunities to our understanding of leadership.

Leaders bear a huge weight of responsibility in modern organizations. Although we have talked a great extent about how leaders emerge and guide their groups to accomplish great things, leaders, at the heart of it, are still people. As one expert leadership consultant noted during COVID-19, many leaders fell victim to "superhero syndrome." These leaders tried to put on a brave face for followers, projecting strength and expertise. However, these leaders often encountered rapid changes that were too fast for them to handle, and they often compensated by working unreasonably long hours. On the other hand, leaders who did not fall victim to superhero syndrome had the confidence to admit and recognize that conditions were changing rapidly and they did not have all of the answers to the problems that would arise.[258] Much of an organization's success or failure is due to factors outside the influence of leadership. Moreover, leaders themselves are not perfect. Glorifying leadership while not recognizing that the practice of leadership is incredibly "messy," with multiple variables and moving parts, may be an inaccurate representation of the reality of organizational life.

Leadership Challenges

In this section, we present challenges to the accepted beliefs about the value of leadership.

Leadership as an Attribution As you may remember from the chapter on perception and decision making, attribution theory examines how people try to make sense of cause-and-effect relationships. The **attribution theory of leadership** says that leadership is merely an attribution people make about other individuals.[259] For example, we attribute the following to leaders: intelligence, outgoing personalities, strong verbal skills, aggressiveness, understanding, industriousness, and so on.[260] We also, in our day-to-day interactions with our leaders, tend to make attributions toward our relationships (e.g., my supervisors gave me a terrible performance appraisal because they *hate me*).[261] At the organizational level, we tend, rightly or wrongly, to see leaders as responsible for both extremely negative and extremely positive performance.[262] Attribution theory suggests effective leadership is perhaps more perception than reality. Therefore, what value is there in leadership if it lies in the eye of the beholder?

attribution theory of leadership A leadership theory stating that leadership is merely an attribution that people make about other individuals.

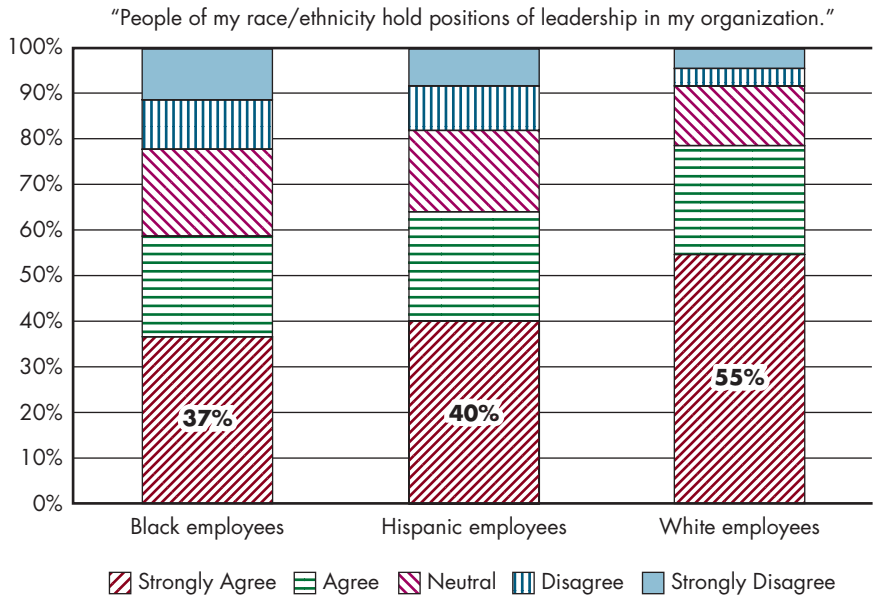
Perceptions of leaders by their followers strongly affect leaders' ability to be effective. Employee perceptions of leaders' behaviors are significant predictors of whether they blame their leaders for failure, regardless of how their leaders assess themselves.[263] Second, a study of more than three thousand employees worldwide found people who tended to "romanticize" leadership in general were more likely to believe their own leaders were transformational, regardless of whether they were really transformational.[264]

We also make demographic assumptions about leaders. Respondents in a U.S. study assumed a leader described with no identifying racial information was White at a rate beyond the base rate of White employees in that company, regardless of respondents' race.[265] When identical leadership situations are described but the leaders' race is manipulated in the description, these described leaders (who respondents believed to be White) were rated as more effective.[266] One large-scale summary found that many individuals hold stereotypes of men as having more leader characteristics than women, although, as you might expect, this tendency to equate leadership with masculinity has decreased over time.[267] Other data suggest women's perceived success as transformational leaders may be based on situations. These differences in race and ethnicity-based leadership attributions may be one mechanism behind leadership under-emergence for women and employees from ethnically diverse backgrounds, as can be seen in the OB Poll.

Attribution theory suggests that what is important is projecting the *appearance* of being a leader rather than focusing on *actual accomplishments*. Leader-wannabes who can shape the perception that they are smart, personable, verbally adept, aggressive, hardworking, and consistent in their style can increase the probability that their supervisors, colleagues, and employees will view them as effective leaders. It works both ways as well—coworkers and leaders alike can see a follower engaging in OCB toward the leader as being ingratiating or "sucking up."[268] Similarly, attributions that suggest the leader was only acting fairly for non-benevolent motives (e.g., desiring to exercise control or maintain their image) do not influence trust in the leader like a more benevolent motive would.[269] Even more worrisome, attributions can greatly affect our perception of (un)ethical leadership, leading followers to attribute different motives to leader unethical behavior (affecting how they react to it),[270] and also influence how leaders respond to followers' unethical behavior (e.g., punishing and blaming the victims while excusing favorites).[271]

OB POLL

Leadership Representation in Organizations



Source: Based on M. Brenan and W. Dupree, "Representation Shapes Black Employees' Work Experience," *Gallup,* January 15, 2021, https://news.gallup.com/poll/328457/representation-shapes-black-employees-work-experience.aspx; C. Lloyd, "The Culture Costs of No Black Leaders," *Gallup*, February 11, 2021, https://news.gallup.com/opinion/gallup/329588/culture-costs-no-black-leaders.aspx

neutralizers Attributes that make it impossible for leader behavior to make any difference to follower outcomes.

substitutes Attributes, such as experience and training, that can replace the need for a leader's support or ability to create structure.

Neutralizers of and Substitutes for Leadership One theory of leadership suggests that, in many situations, leaders' actions are irrelevant.[272] **Neutralizers**, such as indifference to rewards, make it impossible for leader behavior to make any difference to follower outcomes (see Exhibit 12-8). On the other hand, experience and training are among the **substitutes** that can replace the need for a leader's support or ability to create structure. Organizations such as video game producer Valve Corporation, W. L. Gore, and collaboration-software firm GitHub have experimented with eliminating leaders and management. Governance in the "leaderless" work environment is achieved through accountability to coworkers, who determine team composition and sometimes even pay.[273] Organizational characteristics such as explicit formalized goals, rigid rules and procedures, and cohesive work groups can replace formal leadership. At the same time, leadership can also substitute for the effects of policies, practices, and procedures. For example, ethical leadership can substitute for actual justice enactment, such that perceiving your leader as ethical matters more to you than them actually enacting and enforcing justice.[274]

Sometimes the difference between substitutes and neutralizers is fuzzy. If I am working on a task that is intrinsically enjoyable, theory predicts leadership will be less important because the task provides motivation. But does that mean intrinsically enjoyable tasks neutralize leadership effects, substitute for them, or both? Another problem is that, while substitutes for leadership (such as employee characteristics, the nature of the task, etc.) matter to performance, that does not necessarily mean leadership is without consequence.[275] It is simplistic to think employees are guided to goal accomplishments solely by the actions of their leaders. We have introduced several variables—such as attitudes,

Exhibit 12-8 Neutralizers of and Substitutes for Leadership

Defining Characteristics	Relationship-Oriented Leadership	Task-Oriented Leadership
Individual		
Experience/training	No effect on	Substitutes for
Professionalism	Substitutes for	Substitutes for
Indifference to rewards	Neutralizes	Neutralizes
Job		
Highly structured task	No effect on	Substitutes for
Provides its own feedback	No effect on	Substitutes for
Intrinsically satisfying	Substitutes for	No effect on
Organization		
Explicit formalized goals	No effect on	Substitutes for
Rigid rules and procedures	No effect on	Substitutes for
Cohesive work groups	Substitutes for	Substitutes for

Source: Based on K. B. Lowe and W. L. Gardner, "Ten Years of the Leadership Quarterly: Contributions and Challenges for the Future," *Leadership Quarterly* 11, no. 4 (2000): 459–514.

personality, ability, and group norms—that affect employee performance and satisfaction. Leadership is simply another aspect of our overall OB model.

Leadership Opportunities

Despite the challenges that confront our understanding of leadership, at the same time, there are a number of opportunities for managers to apply what we know from OB to identify, develop, and leverage leadership in organizations.

Identifying and Selecting Leaders Because nothing lasts forever, the most important event an organization needs to plan for is a change in leadership. Sometimes, when organizations do not plan for leadership changes, they may not make the best leader appointments or may otherwise spin their wheels with an ineffective interim leader.[276] JCPenney hired a CEO with no department store experience who promptly changed its overall strategy, a maneuver so disastrous that JCPenney's stock fell 69 percent in the roughly one year he lasted (after which JCPenney rehired the old CEO it had forced out and he stayed until the company returned to a better standing). After that debacle, JCPenney seemed to learn its lesson by hiring Marvin Ellison, an executive from Home Depot who also had 15 years of experience at Target. The company's press release repeatedly described Ellison as "a highly-accomplished retail executive [with] an extensive knowledge of store operations." However, ultimately, Ellison jumped ship, and JCPenney declared bankruptcy following several years with another well-qualified CEO and was acquired by Simon Property. [277] Clearly, one bad leadership appointment can spell ultimate disaster for a company.

The process organizations go through to fill management positions is an exercise in the identification of effective leaders. You might begin by reviewing the knowledge, skills, and abilities needed to do the job effectively.[278] Research suggests that the competencies needed for leaders at various levels differs by level.[279] Executive leaders need conceptual, problem-solving, social, and strategic skills. Middle managers benefit from interpersonal, social judgment, and people skills. Supervisory leaders, depending on the position, can benefit from the same skills as middle managers but also from technical skills and knowledge. Personality tests can identify traits associated with leadership—extroversion,

conscientiousness, and openness to experience. Broad experience is a poor predictor of leader effectiveness (although boards tend to overly rely on track record),[280] but situation-specific experience is relevant.

Training and Developing Leaders Organizations spend billions of dollars on leadership training and development.[281] These efforts take many forms, from expensive executive leadership programs offered by universities such as Harvard to quick, just-in-time smartphone leadership training through mindgym. How can managers get the most from their leadership-training budgets?[282] First, the key is to conducting a good needs analysis. Organizations need to ask themselves, "What are our current staffing needs?" and "What is our current leadership talent pool like?" From there, they have a better idea of what their leadership training needs are. Furthermore, organizations need to explicitly identify what they are looking to develop in leaders. For instance, organizations can teach critical interpersonal skills if these are necessary or cross-cultural communication skills for leaders aspiring toward positions that involve intercultural contact. After the design and delivery of training (from either an outside vendor or internally developed program), organizations should determine whether the training *transferred* to the new environment. Did the trained leader actually put into practice what they learned? If not, did they have an opportunity to demonstrate the new skill, or were they motivated to demonstrate it? Leaders should make it a habit to regularly review their leadership after key organizational events as part of their development.[283] After identifying and "grooming" leaders and determining whether they have developed the requisite skills, these accomplishments can be considered in determining which leaders should be promoted, retained in their current positions, or (in the case of poor performance) demoted or transferred laterally. Another option is coaching. Between 25 and 40 percent of Fortune 500 companies have hired coaches to help top executives improve their leadership skills, reporting an average return of about $100,000 per investment.[284] These would work similarly to a formal training program but would more closely resemble a mentorship relationship (as described in the next section).

Myth or Science?

Leaders Can Be Trained

U.S. companies spent $82.5 billion on workplace training in 2020. Estimates suggest that executives budget the majority of funds in organizational training for leadership development. The question is, are they getting a good return on investment?

Evidence from meta-analyses suggests that individuals' leadership behaviors, skills, and styles are essential predictors of employees' productivity and satisfaction, team performance, and overall organizational performance. However, popular press articles often imply that training programs are minimally effective at developing these leadership skills. Instead, there is the familiar notion that "managers are created, leaders are born." On the other hand, the research literature presents more optimistic findings. The research demonstrates that people can learn from leadership training programs, apply what they learn to the workplace, and enjoy enhanced performance as a result.

Nonetheless, not all leadership training programs are created equal. Studies have found that programs developed using a needs analysis (i.e., determining the exact kinds of leadership skills needed) result in more significant learning and transfer of skills to the workplace. Furthermore, evidence suggests that mandatory programs are better at achieving organizational outcomes than voluntary programs. Moreover, programs that allow employees to practice what they learned are more effective than those that merely present information on what it means to be a successful leader. Thus, while the evidence is clear that training can build leadership skills, organizations should purposefully design these programs based on best practices if they hope for a return on their investment.[285]

Exhibit 12-9 Career and Psychological Functions of the Mentoring Relationship

Career Functions	Psychosocial Functions
• Lobbying to get the protégé challenging and visible assignments • Coaching the protégé to help develop their skills and achieve work objectives • Providing exposure to influential individuals within the organization • Protecting the protégé from possible risks to their reputation • Sponsoring the protégé by nominating them for potential advances or promotions • Acting as a sounding board for ideas the protégé might be hesitant to share with a direct supervisor	• Counseling the protégé to bolster their self-confidence • Sharing personal experiences with the protégé • Providing friendship and acceptance • Acting as a role model

Leaders as Mentors Leaders often take responsibility for developing future leaders. A **mentor** is a senior employee who sponsors and supports a less-experienced employee, a protégé.[286] Mentoring relationships serve career and psychosocial functions (see Exhibit 12-9).[287] Successful mentors build a personal relationship with protégés that is characterized by mutual trust, instill accountability and build confidence and adaptability in protégés, and seek to improve protégés' competence and career progression (e.g., through networking).[288]

mentor A senior employee who sponsors and supports a less-experienced employee, called a protégé.

In formal mentoring relationships, protégé candidates are identified according to assessments of leadership potential and then matched with leaders in corresponding organizational functions. Informal mentoring relationships develop when leaders identify a less-experienced, lower-level employee who appears to have potential for future development.[289] The protégé is often tested with a particularly challenging assignment. If performance is acceptable, the mentor develops the relationship. In both formal and informal mentoring, the goal is to show the protégé how the organization *really* works outside its formal structures and procedures.

Are all employees in an organization likely to participate in a mentoring relationship? Unfortunately, no.[290] However, research continues to indicate that employers should establish mentoring programs because they benefit both mentors and protégés,[291] although informal arrangements tend to work better.[292] Furthermore, there are some gender differences in that males tend to be more likely to serve as a mentor, while females tend to both give and receive more psychosocial support in a mentoring relationship.[293] You might assume that mentoring is valuable for objective outcomes like compensation and job performance, but research suggests the gains are primarily psychological.[294] Thus, while mentoring can have an impact on career success, it is not as much of a contributing factor.

Summary

Leadership is central to OB because leaders play a vital role: influencing the group, team, unit, or organization to realize their vision. Although not everyone *has to be* a leader, understanding what it takes to be a good leader (and a good follower) can help improve interpersonal dynamics in the workplace. This is especially true when coordination is critical, such as during times of crisis. There are several approaches that OB theorists, researchers, and practitioners have introduced to make sense of this leadership puzzle. First, the trait theories suggest that personality traits and individual differences (e.g., the Big Five, proactive personality, the Dark Triad, emotional intelligence) all have implications for leadership, although they primarily matter most for predicting who emerges as or becomes a leader. Second, behavioral theories focus mainly on *what leaders do,* primarily uncovering two behaviors that matter for leader success: initiating structure and consideration. Third, the contingency theories suggest the best leadership characteristics, styles, or approaches *depend (or are contingent) on the situation or context.* Modern followership theories (e.g., shared leadership theory and followership theory) suggest that the followers themselves serve as the most critical contingency. Fourth, modern leadership theories point to the *positive ways that leaders make a difference on followers*, focusing on how leaders inspire followers to band together toward a shared vision. Charismatic and transformational leadership can be powerful motivational leader forces. In contrast, transactional approaches form a managerial foundation that establishes a structure for followers. Finally, being a leader inevitably involves *making ethically charged decisions.* Therefore, they face decisions regarding how to present themselves (e.g., authentically) and how to treat their followers (e.g., abusively or developmentally) and in determining the example they want to set through their actions (e.g., ethically or unethically). Together, these modern leadership approaches forge a fulfilling relationship between leader and follower, or a leader–member exchange characterized by mutual trust. Although leadership is undoubtedly a "messy" subject in organizations, wrought with many challenges, it also presents many opportunities to accomplish great things.

Implications for Managers

- Although extroverted people are more likely to be hired or promoted into leadership positions, extroversion does not necessarily predict more effective leadership. Instead, try to focus on how the person leads and their leadership skills.
- As a leader, the worst thing that you can probably do is to do nothing. Although there may be times when inaction is necessary, it may spell disaster if it is your default style.
- When it comes to leadership, there may very well be no one-size-fits-all approach. When deciding how to act as a leader, consider the situation and context first (e.g., the culture, the climate, the follower base) and decide which approach may be most appropriate. Moreover, consider the outcomes and side effects of the approaches you choose and work pre-emptively to address them.
- Out of all the behavior leaders engage in, two are the most important: initiating structure and consideration. Depending upon the situation, leadership problems require some degree of both to be solved.

- Leadership should be built on a solid foundation of managerial and transactional leadership, which sets the structure for the goals to be accomplished to realize the vision.
- Charismatic and transformational leadership can be practical tools for inspiring and motivating followers to do great things and build high-quality relationships with followers. However, they can also be used for unethical purposes, which should be avoided.
- Understand the ethical context and issues surrounding the leadership problems you are charged with addressing. Strive to act authentically, ethically, and in a way that serves your followers.
- Understand the negative consequences of destructive and abusive leadership. Regulate your emotions and your actions to avoid this type of behavior. If you do act abusively, own up to your misbehavior and work with the victim constructively to move forward and ensure that it does not happen again.
- When establishing relationships with followers, try not to "play favorites." Although it may not be possible to develop high-quality exchange relationships with all your followers, try to treat everyone fairly and supportively, and base any recognition and resources given out on performance and skill, not friendship or how much you like them.
- Trust is a critical component of the leader–follower relationship. Not only is it important to feel trusted by your followers (and to know that they trust you), but it is also vital for your followers to know that you trust them. Work toward building trust over time, and when trust is broken, quickly own up to it. Also, know that trust is challenging to rebuild after an ethical violation (e.g., deception) and may never fully recover.
- Certain aspects of the organization (e.g., its culture, climate, structure) can sometimes neutralize the effects of leadership. Moreover, other aspects of the organization may "fill in" or "substitute" for the absence of leadership. Try to recognize if this is happening and get a sense of the effect that it is having. There could be a missed opportunity to improve processes by enhancing leadership.
- Many contend that leadership is all about perception. People can behave in ways that make them "appear" like leaders. Otherwise, influential people may be passed up for a leadership position or promotion because they do not "come off" as leaders. Try to be mindful of your own leadership biases and use objective criteria as much as possible when making decisions, especially those involving identifying leaders.
- Consider evidence-based leadership selection, training and development, and mentoring programs to leverage the power of leadership in your organization.

CEOs Start Early

POINT

If you really get down to specifics, you can see that CEOs start in leadership roles early in life. They have similar backgrounds, childhood challenges, and coping strategies. In fact, it is easy to see a CEO-in-the-making at your neighborhood lemonade stand.

What is the profile of burgeoning CEOs? It starts with their parents, who are almost all successful through industriousness. For example, Linda Zecher, the former CEO of publisher Houghton Mifflin Harcourt, grew up in a household in which her father ran several businesses. Brent Frei, CEO of software company Smartsheet.com, grew up on an 800-acre farm that his father owned and operated. Aspera CEO Michelle Munson's mother was a professor, and her father was the fifth-generation leader of her farm.

Second, future CEOs are raised with responsibilities. Susan Story, CEO of utility company American Water, learned as a child that "no matter how bad things get, it's about working hard and taking personal responsibility, because nobody owes you anything." Frei "had an opportunity to do big things early on. When I was 6 years old, my dad . . . put me in the pickup, put it in first gear, and I drove it home with my 5-year-old sister in the passenger seat." Many CEOs grow up working on family farms or taking care of their siblings.

Third, burgeoning CEOs are successful leaders when they are young. Ruth Rathblott, CEO of Harlem Educational Activities Fund, was president of her seventh-grade class and then president of the middle school; Brad Jefferson, CEO of video slide show service Animoto, was the high school quarterback, captain of the football team, and senior class president; and Hannah Paramore, founder of digital agency Paramore, "was always the one in charge. I was always captain of this and captain of that."

Clearly, CEOs start early.

COUNTERPOINT

CEOs who start early have good stories to tell when they become successful, but that does not necessarily mean they represent the majority. Let's look at a few other aspects of the tender years of CEOs.

First, we know that much of our personality is attributable to genetics, but it is incorrect to infer that we can (1) map the genetic trail for a personality trait from ancestors to CEO or (2) tell where a young person's traits will lead. Likewise, we cannot say that if the parents are successful through industriousness, their children will be. Story's parents worked in a cotton mill and a wastewater plant, and they "didn't have a lot of money." Frei's family farm "was a little bit below the threshold for break-even." Mitch Rothschild, CEO of website Vitals, observed, "Parents influence you either because you want to be like them or because you want to not be like them."

Second, what child is raised without responsibilities? None, even if all they have to do is go to school. There are plenty of CEOs who had a lot of responsibilities growing up, and others who did not. Munson's parents "emphasized two things. One was education, and the other was participating in 4-H." Zecher "had a paper route. [She] was a girl scout, and [she] was involved in a lot of clubs and sports in high school."

Third, it would be a mistake to conclude that CEOs start as young leaders. The ones who do simply do not talk about it. Ron Kaplan, CEO of manufacturer Trex, was a marksmanship competitor. Zecher did not have a plan or a leadership role until after college.

The stories of CEOs who start early make for good press reports, but CEOs do not by definition start early. What we can say, though, is that genetics and experiences both shape young people, and that the relationship between those factors and CEO success is complex.[295]

CHAPTER REVIEW

QUESTIONS FOR REVIEW

12-1 What are the conclusions of trait theories of leadership?

12-2 What are the central tenets and main limitations of behavioral theories of leadership?

12-3 What are the contingency theories of leadership?

12-4 What are the positive leadership styles and relationships?

12-5 In what ways can leaders create ethical organizations?

12-6 How can leaders have a positive impact on their organizations through building trust?

12-7 What are the challenges and opportunities to our understanding of leadership?

APPLICATION AND EMPLOYABILITY

Understanding how leaders emerge, what makes leaders effective, and leading and influencing people to pursue a vision and achieve organizational goals are invaluable skills. These skills will help you become more employable and perhaps improve your chances of being promoted in your job. This information is also vital for knowing how to interact and communicate effectively with your manager or supervisor. From this chapter, we know leadership is a multifaceted concept: Our personality traits can affect whether we become leaders (and if we will tend to be good at it). This may be important when you are in a position where you have a say in appointing a leader to your team or department. You should now have a better idea about what leaders do and how situations constrain them. You also know how vital the leader–follower relationship is to effective leadership and how charisma, authenticity, ethicality, and transformational leadership styles tend to be very effective. Clearly, you can see that being a leader and being a manager are two separate things. By inspiring and challenging your subordinates, you build trust and develop them so that they grow as employees and help the organization achieve its goals. In this chapter, you improved your critical thinking, creativity, and leadership skills by finding out that effective leadership training and development is not a myth, by learning how leadership can be leveraged to make the world a better place, evaluating the ethics of nudging behaviors, and questioning whether CEOs take on leadership roles early in life. In the following section, you will continue to develop these skills, along with your self- and career management skills, by identifying examples of leaders from multiple different contexts, considering the ethical obligations of CEOs to their employees when CEOs consider leaving, and analyzing the effectiveness of shared leadership.

EXPERIENTIAL EXERCISE What's in a Leader?

Break the class into (or allow the class to volunteer to join) one of the following five groups:
GROUP A: Government leaders (president, senator, governor, representative, assemblyperson)
GROUP B: Business leaders (CEO, president, leader in business)
GROUP C: University leaders (university president, provost, dean, professor)
GROUP D: Sports leaders (coach, informal team leader, team captain)
GROUP E: Social/thought leaders (activists, whistleblowers, authors)

Questions

12-8. Each group selects one leader from popular culture or history to serve as an appropriate example for the group. The group discusses that person, identifying the defining characteristics or traits of the leader, not simply by brainstorming but by drawing on examples that most of the group members agree are defining characteristics of the person.

12-9. Reconvene the class. The instructor will draw on the board one column for each of the five groups and list the selected person and their characteristics in each column. For each person selected

by the groups, decide whether the person's traits or attributions would lead to good or bad leader effectiveness for the group's type of leader. Why or why not? What would the results of the *opposite* or *alternative* strategies in those contexts be, and why? What similarities do you see between the lists? From the results of this exercise, does it appear that what it takes to be a good leader depends on the context? For each context, does it appear that what makes for leader emergence within the context is different from what makes leaders effective?

ETHICAL DILEMMA Innocent, but What About Trust?

Innocent Drinks is a London-based company operating in the beverages industry worldwide. The business idea was conceived in 1998 by three Cambridge University graduates, and the company made its début in 1999. The three friends led the business idea by having a clear vision, and they took personal risks to achieve it. Their goal was to produce 100-percent natural smoothies that "do good." The uniqueness of the company's products and the unique leadership style became the brand's selling point. With an inspirational and ethical leadership style, a business approach that emphasized social responsibility and ethical sources, an employee-led innovation culture, and its stated purpose of "doing good," Innocent established a reputation and became successful in the market. Since 2014, Innocent has thrived in 15 European countries.

Notwithstanding this success, Innocent recorded losses in 2008 due to the economic downturn, and in 2009 they announced plans to sell 10 percent of the company to Coca-Cola. Following this announcement, Innocent experienced a fall in their Ethiscore from 12.5 to 6.5. In 2013, the Coca-Cola Company increased its stake to over 90 percent of Innocent Drinks, leaving very little scope for the former leadership of the company to lead the future of the brand. Despite the positive strategic implications for global expansion and product development (including the launch of its coconut water products and Innocent Bubble in 2015), debates raged over the trustworthiness and the authenticity of its leadership, leading to a simple question about the brand: could customers still trust its Innocence?[296]

Questions

12-10. Analyze the charismatic, transformational, and transactional elements of Innocent's leadership since the expansion of Coca-Cola's stake in the company.

12-11. What is ethical leadership, and how could it be evidenced in Innocent Drinks?

12-12. Why has the authenticity of the ethical leadership of Innocent Drinks come under scrutiny?

CASE INCIDENT Andrea Illy: Leading a Family Company Responsibly

Founded in 1933 in Trieste, Italy, by Francesco Illy, the Illycaffè coffee dynasty is led today by the third generation of the family, with Chairperson Andrea Illy at its head. The firm operates in over 140 countries and has a turnover of about €500 million. More than 100,000 retailers serve Illy coffee, and the aim is to double that figure by 2027—but not at any cost. Mr. Illy is a firm believer in responsible business.

Illy has emerged as one of the most outspoken Italian business leaders. He has long espoused a sort of pick-and-mix version of capitalism, resolutely refusing to focus only on sales and profits. However, he rejects the notion his style of capitalism is charity, arguing instead that what he does is just good business.

This view has been shaped by the coffee sector itself, where issues such as sustainability have become a major concern. For decades, the company has paid its growers 30 percent higher than the average market value in order to maintain its supply of top Arabica beans. "This is not just good for society and workers, but it is good for business," Illy says. "It is about shared values. It builds a long-term relationship with growers, which is good for customers, because of the quality of the coffee, and for our business too."

"This is about social responsibility," he insists, "but the real one and not the fake one. This is about being a stakeholder model and not a shareholder one. The business leader is always asking people to do things for him, but instead he should be asking: 'What can I do for you?'"

The Illy family is a supporter of arts and culture, including Trieste's annual sailing regatta, the Barcolana, where hundreds of boats race in the Gulf of Trieste. Illy says this creates a virtuous circle: the more attractive Trieste becomes, the more talented people Illy can attract to work for the company, and the more visitors come to the city, raising its brand profile.

A portrait of his father Ernesto, one of his leadership heroes, hangs opposite his desk. "I put the painting there to ask him to control what I do," Illy says. But what has Illy learned from his family? "Society is made by the private sector, mostly," he says. "And if you want to improve society, then we need to be able to pursue long-term goals which are beyond profitability, and then you have to be free and accountable only to yourself."[297]

Questions

12-13. Based on the concepts in this chapter, what is Andrea Illy's approach to leadership?

12-14. What evidence is there to suggest that his approach can be successful?

12-15. Identify some other business leaders who have similar leadership ideas. Have they been successful?

12-16. What arguments can you offer against responsible leadership?

13 Power and Politics



Source: Jessica Hill/AP/Shutterstock

LEARNING OBJECTIVES

After studying this chapter, you should be able to:

13-1 Contrast leadership and power.

13-2 Explain the three bases of formal power and the two bases of personal power.

13-3 Explain the role of dependence in power relationships.

13-4 Identify influence tactics and their contingencies.

13-5 Identify the causes and consequences of abuse of power.

13-6 Describe how politics work in organizations.

13-7 Identify the causes, consequences, and ethics of political behavior.

Employability Skills Matrix (ESM)

	Myth or Science?	An Ethical Choice	Point/ Counterpoint	Toward a Better World	Experiential Exercise	Ethical Dilemma	Case Incident
Critical Thinking & Creativity	✓		✓		✓	✓	✓
Communication		✓		✓	✓		
Collaboration	✓				✓		
Self-Management	✓	✓	✓	✓	✓	✓	✓
Social Responsibility		✓	✓	✓		✓	✓
Leadership			✓	✓	✓	✓	✓
Career Management	✓	✓	✓			✓	✓

EMPIRE OF PAIN

The Sacklers, the family behind Purdue Pharma (a major pharmaceutical company), carefully cultivated an image of philanthropy in the public view. Their name was plastered on buildings across the world, from New York's Metropolitan Museum of Art to the Westminster Abbey in London. They have amassed a collective net worth of $13 billion, becoming one of America's wealthiest families. Yet many consider members of the Sackler family to be personally responsible for causing the opioid epidemic.

In 1996, Purdue Pharma began selling a new painkiller, OxyContin, a form of the powerful opiate oxycodone, that is twice as potent as morphine. At the time, the drug was groundbreaking: The pill's special coating allowed large doses of oxycodone to be slowly released. Purdue Pharma's power and influence continued to grow as it came to dominate the opioid market. More and more individuals developed a dependence on these powerful drugs. More than twenty years later, Purdue Pharma would be at the center of a scandal surrounding its role in the opioid epidemic, with hundreds of people dying every day from overdoses.

Investigations of the inner workings of Purdue Pharma demonstrated that members of the organization utilized a variety of influence tactics to achieve its astounding level of success. In fact, the company earned more than $10 billion in profits. First, the company had to form coalitions with physicians, individuals who would be perceived as legitimate. To convince physicians to use and promote the drug, Purdue funded research that incorrectly claimed

that opioid addiction concerns were exaggerated. At the same time, Purdue Pharma showcased to physicians how OxyContin could be used to help treat a wide range of medical issues. In exchange for speaker fees, dinners, and trips, physicians prescribed Purdue's opioid products.

Purdue Pharma understood that physicians were heavily influenced by their peers. Therefore, Purdue Pharma capitalized on physicians' networks and enlisted prominent doctors to endorse their products and share them with fellow doctors. Keith Humphreys, professor of psychiatry at Stanford and a former drug-policy advisor to the Obama administration, noted that one of the most concerning aspects was how many well-meaning doctors were convinced to prescribe OxyContin due to Purdue's extraordinary level of influence. Also, an electronics health record company, Practice Fusion Inc., received payments in exchange for referring, recommending, and arranging the ordering of Purdue's products.

An army of sales representatives was also enlisted to realize this massive influence operation. Through the "Evolve to Excellence" program, Purdue sales representatives heavily marketed OxyContin to high-volume prescribers. These physicians were writing twenty-five times as many OxyContin prescriptions as other physicians. The result was health care providers prescribing opioids for uses that were unsafe and not medically necessary. Purdue also implemented a lucrative bonus system that rewarded sales representatives who increased OxyContin sales in their territories. Marketing materials used by Purdue Pharma demonstrated how they were able to persuade patients to believe that using the drug frequently did not mean they had a drug addiction. The materials reasoned that patients were using the drugs for medical purposes to relieve pain. Therefore, according to the materials, dependency was not a concern. Doctors faced even more pressure because of the pay-for-performance systems that were in place. Providers were evaluated based on their ability to relieve patients' pain, and the prescription of opioids was a quick solution.

Finally in 2020, Purdue Pharma pleaded guilty to three criminal charges, officially taking responsibility for its role in the epidemic that contributed to hundreds of thousands of deaths. Although the Sackler family has agreed to pay $225 million to the federal government to settle civil claims, no criminal charges have been filed against the family. While it is still possible for the family to face charges in the future, critics contend that this deal overlooks that the Sacklers used their power and influence to knowingly generate enormous profits while millions of individuals faced the consequences.[1]

In this chapter, we will learn about power, including how a person obtains power and the tactics employees use to command or direct others to realize their goals. We will also learn the role of political behavior in maintaining power within an organization. Power in organizations is a compelling

force. Power sets the tone for your company culture, it impacts how people communicate in their work groups and teams, it can streamline (or sidetrack) collaboration, it influences the flow of information between people, and it can affect productivity.[2] We begin by exploring our natural association of power with leadership.

Power and Leadership

13-1 Contrast leadership and power.

In organizational behavior (OB), **power** simply refers to the capacity, discretion, and means to enforce one's will over others.[3] Someone can thus have power but not use it; a powerful person has discretion over when to exercise their power. Probably the most important aspect of power is that it is a function of **dependence**.[4] The more people rely or depend upon the powerful person (who controls something the others rely on or want), the more powerful that person becomes. When people begin to have more alternatives and options or begin to rely on themselves or different people, the powerful person loses power.

power The capacity, discretion, and means to enforce one's will over others.

dependence The extent to which people depend or rely upon a powerful person.

Unfortunately, we all too often hear about people using their power to unethical ends. For example, people depend upon executives, managers, and even employee "superstars" (e.g., a partner in a law firm who brings in lucrative clients) for promotions, pay raises, or bringing in customers/clientele. These powerful leaders are, thus, unjustly empowered to enforce their will over others in several ways, including sexual harassment.[5] Sexual harassment is a huge problem, adversely affecting employees' mental and physical health and opportunities for advancement as well as costing organizations millions of dollars in legal fees and employee turnover.[6]

Money is a powerful factor in dependence. For instance, among gig workers, many are financially dependent on their clients for work continuity, with 16 percent being financially dependent on one client.[7] The same is true for major contractors in the public sector.[8] Often, these employees, leaders, and entire organizations depend on a single government contract for business continuity. In the case of government shutdowns and furloughs, these contracts are often cut or suspended, leaving people temporarily out of work for weeks or even months. Financial dependency can also become more salient during times of crisis. For instance, more than half of midlife employees surveyed in one study (55 percent) indicated that they were worried about their financial situation due to the COVID-19 lockdowns.[9]

A careful comparison of our description of *power* with our description of *leadership* in the chapter on leadership reveals the concepts are closely intertwined. How are the two terms different? Power does not require goal compatibility, just dependence. Leadership, on the other hand, requires some congruence between the goals of the leader and those being led. A second difference relates to the direction of influence. Power focuses more on the downward influence on followers. It minimizes the importance of lateral and upward relationships, which are important in leadership. For a third difference, leadership often emphasizes style. It seeks answers to questions such as "How supportive should a leader be?" and "How much decision making should be shared with followers?" In contrast, power focuses on tactics for securing compliance.

You may have noted that, for a power situation to exist, one person or group needs to have control over resources that the other person or group values. This is usually the case in established leadership situations. However, power relationships are possible in all areas of life, not just leadership positions, and power can be obtained in many ways.[10] Let us explore the various sources of power next.

Bases of Power

13-2 Explain the three bases of formal power and the two bases of personal power.

Where does power come from? We answer this question by dividing the bases (or sources) of power into two general groupings—*formal* and *personal*—and breaking down each into more specific categories.[11]

Formal Power

Formal power is based on an individual's position in an organization. It can come from the ability to coerce or reward or from legitimate authority.

coercive power A power base that depends on fear of the negative results from failing to comply.

Coercive Power The **coercive power** base depends on the target's fear of negative results from failing to comply or acting in a way that would anger the power-holder.[12] A sales consultant may remain silent after witnessing their supervisor falsify their team's sales numbers for fear of being terminated or demoted, being assigned to undesirable regions or clients, and/or being treated in an embarrassing way in front of the rest of the team. Even technology can become a conduit for coercive power. For instance, call centers might install electronic surveillance systems that automatically assess workers (through machine learning) and compare their progress with predefined targets. If workers fail to meet these targets they may be punished or docked.[13]

Coercive power comes also from withholding key information. People in an organization who have data or knowledge others need can make others dependent on them. For example, the sales team leader may have valuable information on client leads—anything that might threaten obtaining this information may lead the consultant or cause a consultant on the team to comply or acquiesce. When subordinates are being abused by supervisors, coercive power is often the main force that keeps them from retaliating.[14]

reward power Power based on the ability to distribute rewards that others view as valuable.

Reward Power The opposite of coercive power is **reward power**, which people comply with because it produces positive benefits; someone who can distribute rewards that others view as valuable can have power over them.[15] For instance, the sales team lead who rewards compliant team members with lead information is exercising reward power. Alternatively, these rewards can be financial—such as setting pay rates, raises, and bonuses—or nonfinancial, including recognition, promotions, interesting work assignments, friendly colleagues, and preferred work shifts or sales territories. The degree to which a person exercises reward power has been traced to several individual differences. For instance, research at a large law firm found that political ideology and organizational tenure both influenced the uneven allocation of rewards. In other words, older, conservative supervisors were more likely to discriminately give rewards to staff in such a way that perpetuated gender inequality.[16]

legitimate power Power based on a person's position in the formal hierarchy of an organization.

Legitimate Power The most common way to access one or more of the power bases is probably through **legitimate power**. It represents the formal authority to control and use organizational resources based on the person's structural position in the organization. In general, when school principals, bank presidents, or army captains speak, teachers, tellers, and first lieutenants usually comply. In fact, many people associate power so closely with the concept of hierarchy that just drawing longer lines in an organization chart leads them to infer the leaders are especially powerful.[17]

Legitimate power includes members' acceptance of the authority of a hierarchical position.[18] Research on nearly 650,000 article-discussion pages on Wikipedia found that legitimate power was accepted during fierce source conflicts, when the individual was high status (e.g., recognized as a structural authority on the topic), and when those taking part in the discussion were less

experienced.[19] Moreover, association with legitimate power may serve as a signal that the organization's efforts are worthy of attention and even investment. For example, an analysis of high-ranking Chinese government official visits to corporate-affiliated worksites (e.g., factories) showed that investors reacted positively to these visits (via heightened stock market performance).[20]

Furthermore, legitimate power can also dampen the effect of other forms of power. For instance, when an employee stands up against something unethical, they are less likely to suffer the consequences of others' coercive power (e.g., sanctioning, ostracism, etc.) when they, themselves, are high in legitimate power.[21]

Personal Power

Many people can have power, even if they are not managers and if they have no formal power. What they have is *personal power*, which comes from an individual's unique characteristics.[22] There are two bases of personal power: expertise and the respect and admiration of others. Some people (e.g., a sales consultant) might only have personal power, but others can also have formal power. For example, a sales consultant lead not only may have formal power bases but can also be well liked and respected.

Expert Power **Expert power** is based on expertise, special skills, or knowledge.[23] As jobs become more specialized, we become dependent on experts to achieve goals. It is generally acknowledged that physicians have expertise and hence expert power: Most of us follow our doctor's advice. Returning to our sales consultant example, some of the team members may wield expert power due to their strong sales skills or expertise in the area.

expert power Influence based on expertise, special skills, or knowledge.

Ironically, expert power can occasionally have a detrimental effect on knowledge worker team performance. For instance, in times of turbulence, knowledge worker teams that rely too much on experts who have "entrenched" knowledge or perspectives on the problem (e.g., they have not kept up with all of the advancements despite being experts) can actually *hurt* innovation.[24] Moreover, experts may be more likely to ignore others' advice and not take their feedback into account, especially when they see their contributions less as a responsibility to others and more as an opportunity.[25]



Internet entrepreneur Mark Zuckerberg, cofounder and CEO of Facebook, has expert power. Shown here talking with employees, Zuckerberg earned the title "software guy" during college because of his expertise in computer programming. Today, Facebook depends on his expertise to achieve company goals.
Source: Tony Avelar/FR155217/AP Images

referent power Influence based on identification with a person who has desirable resources or personal traits.

Referent Power **Referent power** is based on identification with a person who has desirable resources or personal traits.[26] If I like, respect, and admire you, you can exercise power over me because I want to please you. Some people who are not in formal leadership positions have referent power and exert influence over others because of their charismatic dynamism, likability, and emotional appeal.[27]

Referent power develops out of admiration of another and a desire to be like that person. It helps explain, for instance, why celebrities are paid millions of dollars to endorse products in commercials. Marketing research shows people such as Michelle Wie, LeBron James, and Cristiano Ronaldo have the power to influence your choice of athletic shoes and credit cards.[28] With a little practice, you could probably deliver as smooth a sales pitch as these celebrities. Indeed, the wild effectiveness of *influencer marketing*, a $10 billion-plus business, provides evidence of this phenomenon as aided by the wide adoption of social media.[29] As one *Forbes* contributor wrote: "Influencers are the new celebrity endorsements"[30]—and there might be something to this.[31] Data from one company found that 92 percent of consumers trust an influencer endorsement more than they would a celebrity endorsement.[32] This has led a number of companies such as Procter & Gamble and Cisco to recruit and hire employees considered to be "influencers" by their peers.[33]

Which Bases of Power Are Most Effective?

Of the bases of power, which are most effective? This is a complicated question. Regarding the dependents in the power relationship, different bases of power are effective depending upon the perceptions and characteristics of the dependent. For example, dependents view angry leaders as higher on formal power, and in turn are more loyal toward these leaders and perceive them as more effective.[34] On the other hand, dependents are likely to perceive coercive and low-referent leaders as ineffective, become less loyal toward these leaders, and even engage in deviant behaviors directed at these leaders.

It does appear though, that referent power can be an especially powerful motivator. Consider Steve Stoute's company, Translation, which matches pop-star spokespeople with corporations that want to promote their brands. Stoute has paired Justin Timberlake with McDonald's, Mary J. Blige with Apple Music, and several famous rappers with shoe companies (e.g., Jay-Z and 50 Cent).[35] Translation's approach has changed with the times as well. As more frequent content is needed in today's day and age, Translation has worked on creating an online mini-series to promote products and organizations and to discuss culture that has reached 42.5 million people. Partnering with Dr. Dre (Beats by Dre), Translation created "The Shop," a series where NBA all-stars (e.g., Kevin Durant, LeBron James) and hip-hop artists (e.g., Future) alike, all with large bases of referent power, discuss several topics (e.g., sneakers, music, the game, etc.) amid a barbershop backdrop.[36]

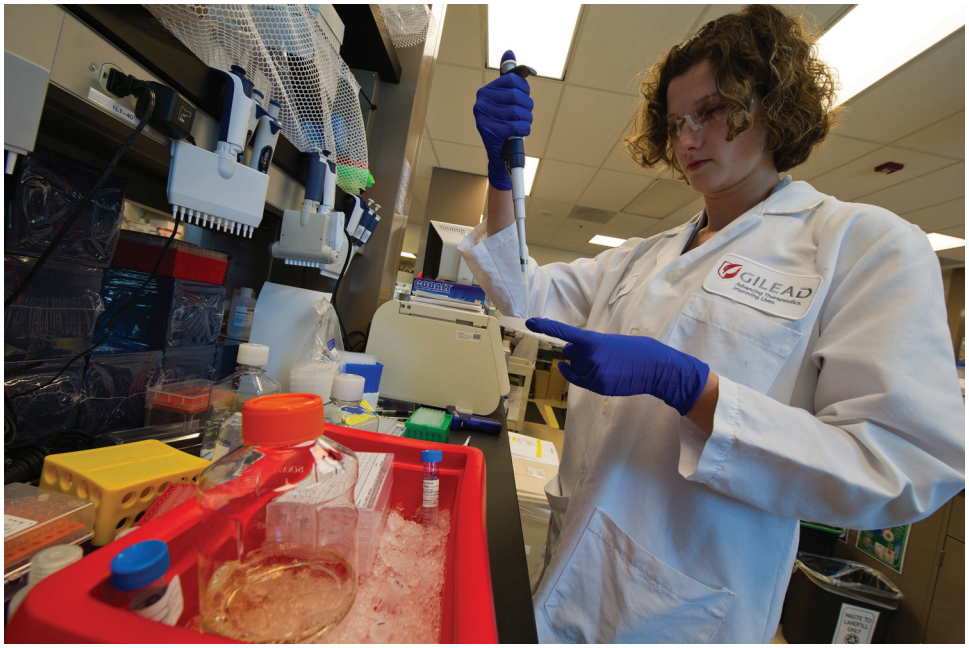
Dependence: The Key to Power

13-3 Explain the role of dependence in power relationships.

The most important aspect of power is that it is a function of dependence. In this section, we show how understanding dependence helps us understand the degrees of power.

The General Dependence Postulate

Let us begin with a general postulate: *The greater* B*'s dependence on* A, *the more power* A *has over* B. When you possess anything others require that you alone control, they can become dependent on you and, therefore, you may gain power over them.[37] For instance, many entrepreneurial CEOs are often unwilling to



Scientist Maria Kovalenko is in a position of power at Gilead Sciences, a research-based biopharmaceutical firm. Scientists are in a powerful occupational group at Gilead because they discover and develop medicines that improve the lives of patients and contribute to Gilead's growth and success.
Source: David Paul Morris/Bloomberg/Getty Images

take the advice of their board members when it means giving up a semblance of power and control over the company.[38] But if something is plentiful, possessing it will not increase your power. Therefore, the more you can expand your own options, the less power you place in the hands of others. This explains why most organizations develop multiple suppliers rather than give their business to only one.

What Creates Dependence?

Dependence increases when the resource you control is important, scarce, and nonsubstitutable.[39]

Importance If nobody wants what you have, it is not going to create dependence. Note, however, that there are many degrees of importance, from needing the resource for survival to wanting a resource that is in fashion, adds to convenience, or is of relational importance. This is why organizations should entrust multiple people to build relationships with clients and suppliers instead of just one. If that one person were to leave, it could very well spell the end of the business relationship if the client could easily go elsewhere.[40]

Scarcity When the supply of labor is low relative to demand, workers can negotiate compensation and benefits packages far more attractive than those in occupations with an abundance of candidates. For example, the number of professional photographers in the United States is steadily increasing and expected to grow by 7 percent by 2026. However, it is relatively easy for organizations to find photographers, with many actually cutting salaried photographers in favor of the occasional contract photographer.[41] In contrast, the market for medical professionals (e.g., physician assistants, registered nurses, and medical technologists) is comparatively tight, with demand high and supply limited. The resulting bargaining power of these medical professionals has led them to enjoy higher pay and more job security.[42]

Nonsubstitutability The fewer viable substitutes for a resource, the more power a person controlling that resource has. For decades, Steinway was the piano of choice for musicians.[43] As Arthur Rubinstein, one of the greatest pianists of the

20th century, wrote: "A Steinway is a Steinway, and there is nothing like it in the world."[44] However, Steinway lost much of its power and hold over the piano market during the last half century.[45] Yamaha, a major competitor, was able to leverage mass manufacturing, automated processes, and technology to build pianos of consistent quality. The more organically crafted Steinways, on the other hand, had many musicians commenting that each one had its own unique sound, which made it difficult to adapt and adjust to different concert halls.[46] In essence, Yamaha was able to leapfrog Steinway, stripping it of its nonsubstitutability.

As a major nonsubstitutability issue confronting the modern workforce, advancements in artificial intelligence (AI) have brought economic and philosophical issues of labor to the forefront. For example, employees with skilled trades are at risk for losing power as their skills become more efficiently and automatically handled by robotics: In other words, their skills are becoming "substitutable." Despite this fear, some economists and theorists suggest that new jobs are created as the need arises for labor that requires nonsubstitutable abilities, and we are merely enhancing productivity and making work easier through AI.[47]

Formal Small-Group Networks

Formal organizational networks can be complicated, including hundreds of people and a half dozen or more hierarchical levels.[48] However, they have substantial implications for power and influence in organizations, as information flows through networks.[49] We have condensed these networks into three common small groups of five people each (see Exhibit 13-1): chain, wheel, and all-channel.

The *chain* rigidly follows the formal chain of command; this network approximates the communication channels you might find in a rigid three-level organization. The *wheel* relies on a central figure to act as the conduit for all group communication; it simulates the communication network you might find in a work group directed by a manager. The manager's central role (especially in larger work groups) enables them to enjoy access to diverse ideas and knowledge, support, and higher power and status.[50] The *all-channel* network permits group members to actively communicate with each other; it is most often characterized by self-managed teams, in which group members are free to contribute and no single person takes on a leadership role. Many organizations today like to aspire toward the all-channel network, meaning that anyone can communicate with anyone.

As Exhibit 13-2 demonstrates, the effectiveness of each network is determined by the outcome you are interested in. The structure of the wheel facilitates the emergence of a leader, the all-channel network is best if you

Exhibit 13-1 Three Common Small-Group Networks

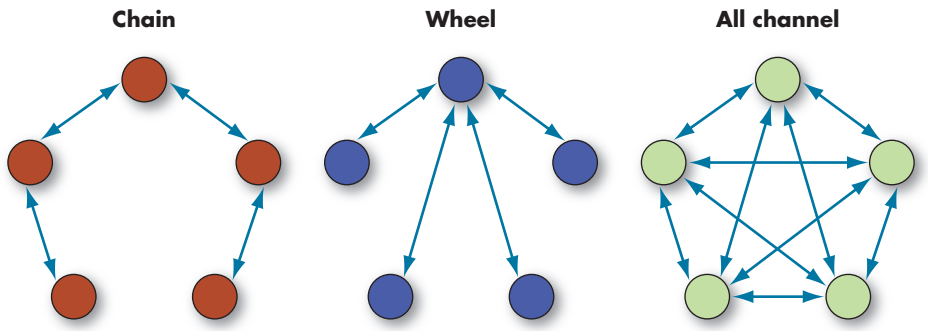


Exhibit 13-2 Small-Group Networks and Effectiveness Criteria

Criteria	Networks		
	Chain	*Wheel*	*All-Channel*
Speed	Moderate	Fast	Fast
Accuracy	High	High	Moderate
Emergence of a leader	Moderate	High	None
Member satisfaction	Moderate	Low	High

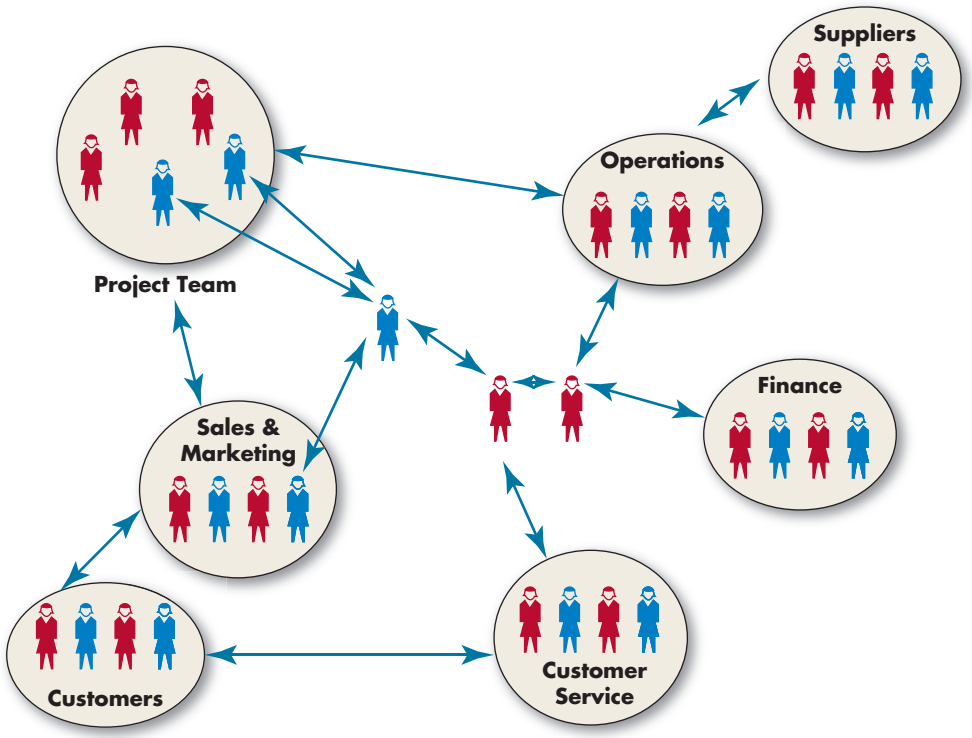
desire high member satisfaction, and the chain is best if accuracy is most important. However, despite our best efforts to create formal network structures, it would be folly to assume that people do not exchange with one another informally. These informal networks hold great power and political influence, disrupting coordination in innovation teams and blocking out the formation of new relationships (when networks are particularly dense and strong).[51] Second, just because the network structure *permits* communication and information exchange does not mean that it actually happens—various formal network structures can lead to similar outcomes, depending on the level of communication and strength of bonds between people.[52] If team members are guarded and secretive in an all-channel network, they will probably not share with one another (or selectively share with one another).[53] Advancement in assessing informal networks in organizations has been revolutionized through the use of social networks analysis, discussed next.

Social Network Analysis: A Tool for Assessing Resource Dependence

One tool to assess the informal exchange of resources and dependencies within an organization is *social network analysis*.[54] This method examines patterns of communication among organizational members to identify how information flows between them. Within a social network, or connections between people who share professional interests, each individual or group is called a node, and the links between nodes are called ties. When nodes communicate or exchange resources frequently, they are said to have very strong ties. Other nodes that are not engaged in direct communication with one another achieve resource flows through intermediary nodes. In other words, some nodes act as brokers between otherwise unconnected nodes. A graphical illustration of the associations among individuals in a social network is called a *sociogram* and functions like an informal version of an organization chart. The difference is that a formal organization chart shows how authority is supposed to flow, whereas a sociogram shows how resources *really* flow in an organization. An example of a sociogram is shown in Exhibit 13-3.

Networks can create substantial power dynamics. Those in the position of brokers tend to have more power because they can leverage the unique resources they can acquire from different groups.[55] In other words, many people are dependent on brokers, which gives the brokers more power. Data from the United Kingdom's National Health Service show that change agents, people entrusted with helping an organization to make a significant change, have more success if they are information brokers.[56] However, it is paradoxical how powerful brokers within marketing agency networks, even though they are more willing to leverage their power, often fail to perceive opportunities to do so.[57]

Exhibit 13-3 An Organizational Sociogram



This might be due to the fact that, in general, executives often have unreliable (or little access to) information about strangers in surrounding networks, which makes it difficult to predict whether seeking out or forging new ties will be successful.[58]

Some of the most powerful people within social networks can amass power because of their personality traits—for example, their insensitivity to rewards (making them resistant to others' influence), extroversion, and even dark triad traits (see the chapter on personality and values) are positively related to their social network position and power.[59] Stereotype threat (see the chapter on diversity, equity, and inclusion in organizations), however, can also influence the effectiveness of women in brokerage positions. Because the agency, power, and assertiveness demands associated with being in a brokerage position contradict stereotypically feminine qualities, women are more likely to experience anxiety about their performance and fear of negative evaluation in these positions.[60]

The relationships brokers form within networks are also extremely important. People form relationships with their leaders and coworkers, such as friendships and partnerships, which nurture mutual reliance and obligation.[61] These "ties" are important not only for getting things done in organizations but also for employees' well-being—employees who do not nurture these ties or who lose them over time are more likely to leave their organization (although these ties can remain dormant, even after the employee leaves!).[62]

There are many ways to implement a social network analysis in an organization.[63] Some organizations keep track of the flow of e-mail communications

or document sharing across departments through big data. Newer applications of AI have enabled organizations and researchers to use machine learning algorithms to model the flow of information in social networks over time (and learn from events).[64] These big-data tools are an easy way to gather objective information about how individuals exchange information. Other organizations look at data from human resources (HR) information systems, analyzing how supervisors and subordinates interact with one another. These data sources can produce sociograms showing how resources and power flow (see Exhibit 13-3). Leaders can then identify powerful brokers who exert the strongest influence on many groups, and consider these key individuals in gaining buy-in or balancing power.

Influence Tactics

13-4 Identify influence tactics and their contingencies.

As discussed in the previous chapter, leadership is all about influence. An effective leader is one who is able to influence others toward the achievement of a set of goals or vision. However, at the beginning of this chapter, we differentiated leadership from power, showing that there are aspects unique to power that matter for our understanding of OB. Although we have a good understanding of what effective leaders do (in terms of style and behavior) along with why power matters, what **influence tactics** do people (e.g., leaders) use to translate power bases into specific action? What options do they have for influencing their supervisors, coworkers, or employees? Research has identified nine distinct influence tactics:[65]

influence tactics Ways in which individuals translate power bases into specific actions.

- *Legitimacy.* Relying on your authority position or saying that a request is in accordance with organizational policies or rules.
- *Rational persuasion.* Presenting logical arguments and factual evidence to demonstrate that a request is reasonable.
- *Inspirational appeals.* Developing emotional commitment by appealing to a target's values, needs, hopes, and aspirations.
- *Consultation.* Increasing support by involving the target in deciding how to accomplish your plan.
- *Exchange.* Rewarding the target with benefits or favors in exchange for agreeing to a request.
- *Personal appeals.* Asking for compliance based on friendship or loyalty.
- *Ingratiation.* Using flattery, praise, or friendly behavior prior to making a request.
- *Pressure.* Using warnings, repeated demands, and threats.
- *Coalitions.* Enlisting the aid or support of others to persuade the target to agree.

Using Influence Tactics

Some tactics are more effective than others. Rational persuasion, inspirational appeals, and consultation tend to be equally effective in influencing performance at work.[66] Rational persuasion, although still effective at helping build relationships at work, tends to not be as superbly effective as inspirational appeal and consultation.[67] The pressure tactic tends to backfire and is typically the least effective.[68] Using ingratiation can improve relational outcomes of influence at work (e.g., during job interviews),[69] but perhaps only when the audience does not really care about the outcome of the request or if it is routine.[70]

Let us consider the most effective way of getting a raise. You can start with a rational approach—figure out how your pay compares to that of your organizational peers, land a competing job offer, gather data that testify to your performance, or use salary calculators like Salary.com, PayScale, or Glassdoor to compare your pay with others in your occupation—then share your findings with your manager. The results can be impressive. In one instance, a member of a product team at a fast-paced startup landed a 12 percent raise when he showed his supervisor a list of his accomplishments along with data to support his value and contribution to the company.[71] Using rational persuasion to make a case to your supervisor about a possible raise or even an alternative work arrangement (see the chapter on motivation applications) may be effective because it fosters a mutual sense of respect between you and your supervisor.[72] Similarly, if you are trying to get your supervisor to buy in to your idea, coming equipped with a demonstration can help. Research on creatives at a video game company found that the use of demos, prototypes, and demonstrations was highly effective at convincing supervisors when coupled with persuasive influence tactics.[73]

While rational persuasion may work in this situation, the effectiveness of some influence tactics depends to some extent on the direction of influence[74] and, of course, on the audience. As Exhibit 13-4 shows, rational persuasion is the only tactic effective at both upwardly and downwardly influencing, although it is stronger when it is used for downward influence attempts.[75] Inspirational appeals work best as a downward-influencing tactic with subordinates.[76] Ingratiation is most effective as lateral influence, although it can also be effective in downward influence.[77] Other factors relating to the effectiveness of influence include the sequencing of tactics, a person's skill in using the tactic, and the organizational culture. In general, you are more likely to be effective if you begin with "softer" tactics that rely on personal power, such as personal and inspirational appeals, rational persuasion, and consultation. If these fail, you can move to "harder" tactics, such as exchange and coalitions, which emphasize formal power and incur greater costs and risks.[78]

As we mentioned, the effectiveness of tactics depends on the audience. People especially likely to comply with soft influence tactics tend to be more reflective and intrinsically motivated; they have high self-esteem and a greater desire for control. Those likely to comply with hard influence tactics are more action-oriented and extrinsically motivated, and more focused on getting along with others than on getting their own way. Interestingly, prior research does not support gender differences in the effectiveness of the use of influence tactics—all benefit from soft or neutral tactics as opposed to harder tactics.[79]

Exhibit 13-4 Preferred Influence Tactics by Influence Direction

Upward Influence	Downward Influence	Lateral Influence
Rational persuasion	Rational persuasion	Rational persuasion
	Inspirational appeals	Consultation
	Ingratiation	Ingratiation
	Legitimacy	Exchange
		Legitimacy
		Personal appeals
		Coalitions

Automatic and Controlled Processing of Influence

To understand the process of influence, it is useful to consider two different ways we process information.[80] Think about the last time you were browsing a social networking website and came across an ad. Moments later, you did not expect to be buying a T-shirt that says, "Don't mess with a Buckeye fan who loves corgis and devours ice cream," did you? Instead of making a concerted effort to research different T-shirt designs, you made an impulse buy that was the result of appealing advertising and a highly intelligent machine learning algorithm. If we are honest, we will admit flashy marketing can have an influence on our choices as consumers,[81] and research shows that in this environment, we tend to operate in an "automatic" mode, with heart rate and skin conductance data to support this.[82]

We often rely on **automatic processing**, a relatively superficial consideration of evidence and information that takes little time or effort, making use of heuristics like those we discussed in the chapter on perception and decision making. Automatic processing can lead people to jump to conclusions about others that would normally, after careful thought, cause someone to be more skeptical or critical. For instance, when bloggers are forthright about their conflicts of interest (e.g., being paid to review a product), you would assume that readers would be more skeptical about the review. However, research shows that people actually trust these people more because the disclosure serves as a cue for their expert power.[83] But can this matter for leaders and their followers in organizations? Yes—studies have demonstrated that even subtle motivational cues in leader e-mails can influence employee performance and motivation.[84] Clearly, the disadvantages of automatic processing are that it lets us be fooled easily by a variety of tricks, like a cute jingle or glamorous photo, and promotes the shallow interpretation of information.

automatic processing A relatively superficial consideration of evidence and information that takes little time or effort and makes use of heuristics.

Now imagine someone choosing a place to live. They may source experts who know something about the area, gather information about prices, and consider the costs and benefits of renting versus buying. This individual is engaging in more effortful **controlled processing**, a detailed consideration of evidence and information relying on facts, figures, and logic. Controlled processing requires effort and energy, but it is harder to fool someone who has taken the time and effort to engage in it. So what makes someone engage in either shallow or deep processing? Some research suggests that a motivational trait (see the chapter on motivation theory), **need for cognition**, predicts the tendency to engage in controlled processing.[85] These individuals are more likely to be persuaded by evidence and facts and are more likely to evaluate arguments carefully and critically before coming to a conclusion. Those who are lower in their need for cognition are more likely to use automatic processing strategies, relying on intuition and emotion to guide their evaluation of persuasive messages.

controlled processing A detailed consideration of evidence and information relying on facts, figures, and logic.

need for cognition A personality trait of individuals depicting the ongoing desire to think and learn.

All humans rely on some degree of both automatic and controlled processing. It is not accurate to suggest that we "choose" one or the other or that leaders have a "choice" in which processing modes to activate.[86] However, leaders can leverage their messaging to make use of both types of processes. For instance, in contexts where people are more likely to rely on automatic processing (e.g., initial product exposure through social media), relying on highly emotional messaging and sensory stimulation can facilitate automatic processing. However, when people are motivated to dig deeper (e.g., determining whether they want to move forward in the interview process in a new organization), the leader can draw on their expert power and rational persuasion to convince others.

Applying Influence Tactics

political skill The ability to influence others so that one's objectives are attained.

People differ in their **political skill**, or their ability to influence others to attain their own objectives.[87] The politically skilled are more effective users of influence tactics and rely on their knowledge of others' demands, resources, and preferences to do so.[88] They are able to recognize opportunities, evaluate the pros and cons of different behaviors, and capitalize on these opportunities when it advances their objectives.[89] Political skill is important especially when social skills are required to do well in your job, such as in sales consultants, real estate agents, and other relationship-oriented occupations.[90] The politically skilled can exert their influence without others detecting it, a key element in effectiveness. (It can be damaging to be labeled political.)[91]

We know cultures within organizations differ markedly—some are warm, relaxed, and supportive; others are formal and conservative. Some encourage participation and consultation, some encourage reason, and still others rely on pressure. People who fit the culture of the organization tend to obtain more influence.[92] Specifically, extroverts tend to be more influential in team-oriented organizations, and highly conscientious people are more influential in organizations that value working alone on technical tasks. People who fit the culture are influential because they can perform especially well in the domains deemed most important for success. Thus, the organization itself will influence which subset of influence tactics is viewed as acceptable for use.

Regardless of the cultural fit, however, evidence suggests that motivation to be political also matters for whether people will develop political skills or use influence tactics at all. In general, extroverts tend to be more prone to develop political skills, although agreeableness and conscientiousness are also important to some degree.[93] Moreover, motivated, risk-tolerant, and even Machiavellian (see the chapter on personality and individual differences) employees are more likely to be motivated to use political influence in organizations.[94] Some research has also found that Machiavellians sometimes operate under the "camouflage" of political skill, using the labels of "political skill" and "influence" to self-interested, sometimes destructive ends.[95]

Overall, political skill leads to several positive individual outcomes for employees.[96] Developing political skill can help you build self-efficacy, help you become more satisfied with your job and committed to your organization, and lead you to experience less stress, to a small degree. Furthermore, developing political skill can boost your performance and productivity as well as enable you to engage in more organizational citizenship behaviors (OCBs). Probably the most important are the career outcomes: Being politically skilled can improve your reputation and career success as you earn a higher income and a more prestigious position and are more satisfied with your career. Research suggests the reasons *why* political skill leads to these positive outcomes are through the reputation and confidence boosts that come along with building these skills.[97]

Toward a Better World

Old Mutual: Realizing a Sustainability Vision Through Influence

"We're actually having the conversation. We're seeing how, through what we do in our day jobs, we can change lives." This quote from a manager at Old Mutual illustrates the value some influence tactics may have in persuading people to adopt sustainable and socially responsible goals. The sustainability chief at Old Mutual organizes workshops with managers, future leaders, and employees that make a case for the importance of social responsibility and sustainability. Executives at Old Mutual, an African financial services company operating in key markets in fourteen countries, have made corporate social responsibility (CSR) a central component of their strategy.

Moreover, their mission statement focuses on value not only for shareholders—but also for the stakeholders of the company. Instead of only approaching CSR from a philanthropy perspective and volunteering, Old Mutual appears to approach the mission through education, training, and the routinization of socially responsible behavior. It is one thing to offer opportunities to give back and an entirely other to make it a crucial part of work life. Through responsible investing, education, and skill development, Old Mutual embeds social responsibility into all facets of its organization and inspires ownership in all employees. This approach stems from the Code for Responsible Investing in South Africa (CRISA), which suggests that collaboration is necessary to garner acceptance, implementation, and engagement in sustainable practices. This approach seems to have paid off for Old Mutual. In fact, Old Mutual has invested more than $9 billion into socially responsible aims.

How does Old Mutual approach influence? For one, it employs what it refers to as a *Cultural Transformation Toolkit* aimed at transforming collective and individual values, priorities, attitudes, and perspectives on social responsibility. More specifically, Old Mutual takes a four-pronged approach to influence: (1) role-modeling desired behavior, (2) garnering conviction (e.g., establishing what is expected, convincing why what is expected is essential and meaningful), (3) skill-building, and (4) formal systems of reinforcement. Old Mutual also encourages employees to consider their place in their social network to empower employees to become agents of change and influence themselves. In doing so, they assess the health and energy of each relationship and diagnose "missing" relationships that should be built and developed to accomplish goals.

The case of Old Mutual reflects what many OB theorists, researchers, and practitioners suggest when influencing others toward socially responsible missions and goals. For instance, Professors Christopher Wickert and Frank G. A. de Bakker found in their interviews with German CSR managers that "it often fell on the CSR manager to nudge other middle-managers—in marketing, procurement, production, and sales—to think about sustainability and participate in new initiatives." Establishing a CSR strategy that influences employees to identify with, support, and implement socially responsible goals takes an immense amount of work but can ultimately be rewarding. Leaders should approach the task in three phases: (1) incubation (i.e., reflect on the business purpose, role, and what aligns with the organization's mission and values), (2) launch (i.e., enthusiastically introduce the initiative and foster ownership in employees for the idea), and (3) entrenchment (i.e., make socially responsible practices routine and tangible, not a downstream, invisible effect—rather, a physical or embodied representation of progress).

Several other practices have been introduced as ways to garner support and persuade others to adopt socially responsible behaviors, including coalition building, tying in sustainability with everyday business routines and outcomes (to increase its salience), incentivizing sustainable behavior, and using social comparison (e.g., benchmarking with other companies and between units internally). Also critical is involving people every step of the way. Polling customers, surveying employees, and assessing their needs can help clarify the CSR issues that are most important to stakeholders (and, therefore, more likely to attract their attention). Another key feature to making this work is by encouraging people to speak up and voice their opinions and ideas concerning CSR initiatives. Soliciting feedback and acting on it can make it clear to employees that their feedback really does make a difference.[98]

How Power Affects People

13-5 Identify the causes and consequences of abuse of power.

Until this point, we have discussed what power is and how it is acquired. But we have not yet answered one important question: "Does power corrupt?" For one, it is clear that power affects the power-holder: It energizes people, on the one hand, but can cause the powerholder to rely more on gut feelings as well as to become self-serving and potentially more corrupt.[99] So all forms of power can lead to the downside of getting "caught up" in the feeling of power.

There is certainly evidence that there are corrupting aspects of power. Power can lead people to place their own interests ahead of others' needs or goals.[100] Why does this happen? Interestingly, power not only leads people to focus on their self-interests because they can, but it also liberates them to focus inward and thus come to place greater weight on their own aims and interests. Power also appears to lead individuals to "objectify" others (to see them as tools to obtain their instrumental goals) and to see relationships as more peripheral.[101]

That is not all. Powerful people react—especially negatively—to any threats to their competence. People in positions of power hold on to power when they can, and individuals who face threats to their power are exceptionally willing to take actions to retain it whether their actions harm others or not. Possessing formal power can alter how you perceive others' emotions (e.g., the powerful are quicker to detect anger because this threatens their power) and cause you to behave in an ineffective way.[102] Those given power are more likely to make self-interested decisions when faced with a moral hazard (such as when hedge fund managers take more risks with other people's money because they are rewarded for gains but less often punished for losses). People in power are more willing to denigrate others. Power also leads to overconfident decision making.[103]

In one of the biggest corruption scandals of this century, the Organized Crime and Corruption Reporting Project has provided journalistic evidence for an international *laundromat*. A laundromat is a system for moving money that enables powerful people (e.g., the wealthy, organized crime leaders, corrupt politicians) to secretly invest "dirty money," launder money, or evade taxes. The Troika Laundromat, named for its connection to the Troika Dialog (a Russian investment bank believed to be behind the laundromat), is a network of over seventy shell companies used for moving money (estimates point to billions of dollars' worth). Through a spinning flurry of financial transactions, it becomes difficult to learn where the money originates from or whether the money is legitimate.[104]

Power Dynamics

As we have discussed, power does appear to have some important disturbing effects on us. But that is hardly the whole story—power is more complicated than that. Whether power is used for nefarious reasons depends on a number of factors, both to the power-holder and within the environment. For instance, people with collectivist values and with strong moral identities may be less likely to become corrupted.[105] However, individuals with a strong need for power, a tendency to react to threat with status- and legitimacy-maintaining ways, and certain dark personality traits (e.g., Machiavellianism) may be more likely to become corrupted.[106] With regard to environmental variables, people are less likely to become corrupted when they identify with the group they hold power in and when there is clear accountability for their actions.[107]

Furthermore, people do not necessarily hold on to power forever. Power can be systematically maintained over time, or it can be lost. In many ways, there are several personal factors that relate to people effectively hanging on to

power.[108] People have a number of tools at their disposal, engaging in many of the influence techniques discussed earlier to perpetuate their tenure in power. Furthermore, certain characteristics of the followers perpetuate the hierarchy. For instance, as described earlier, system justification (see the chapter on diversity, equity, and inclusion in organizations) and attribution theory (see the chapters on perception and decision making as well as leadership) are both factors that hold power-holders in their positions.[109] Regardless, external factors like environmental competition and the skill and ability of competitors can lead to power loss.[110] Moreover, power-holders are often responsible for their own loss of power. Ethical transgressions that lead to public outrage, an inability to see threats from the comfort of their powerful position, and biased decision making (leading to failure) have all been found to precipitate the "dethroning" of the powerful.[111]

Sexual Harassment: Unequal Power in the Workplace

Sexual harassment is defined as any unwanted activity of a sexual nature that affects an individual's employment or creates a hostile work environment.[112] According to the U.S. Equal Employment Opportunity Commission (EEOC), sexual harassment happens when a person encounters "unwelcome sexual advances, requests for sexual favors, and other verbal or physical conduct of a sexual nature" on the job that disrupts work performance or that creates an "intimidating, hostile, or offensive" work environment.[113]

sexual harassment Any unwanted activity of a sexual nature that affects an individual's employment and creates a hostile work environment.

According to multiple surveys on sexual harassment up to 52 percent of women and up to 43 percent of men have reported being subject to sexual harassment behaviors within the last twelve months, and up to 22 percent of women and up to 7 percent of men indicated they have experienced sexual harassment at work in their lifetimes.[114] Sexual harassment is disproportionately prevalent for women in certain types of industries. In an examination of the nearly forty-one thousand EEOC sexual harassment charges filed in a ten-year span, over 25 percent of these cases were in the customer-facing sector (i.e., accommodation, food services, retail).[115]



A federal jury awarded Ashley Alford, an employee of Aaron's Inc., a $40 million judgment in a lawsuit against her employer for sexual harassment by her supervisor. The jury found the supervisor guilty of assault and battery and the company liable for negligent supervision and sexual harassment.
Source: Bill Greenblatt/UPI/Newscom

It goes without saying that the effects of sexual harassment are deplorable and nefarious and, in large part, due to the prevailing climate in the team, organization, or region.[116] Although the definition changes from country to country, 140 nations have at least some policies to protect workers from sexual harassment.[117] Whether the policies or laws are followed is another question, however, and some studies suggest they might not be well implemented.[118] In fact, 50 percent of Americans believe that men getting away with sexual harassment is a major problem in the #MeToo era.[119] Moreover, 46 percent of Americans believe women not being believed is a major problem that undermines efforts to prevent sexual harassment and hold transgressors accountable.[120]

Most studies confirm that power is central to understanding sexual harassment. This seems true whether the harassment comes from a supervisor, coworker, or employee, although it is especially pronounced for employees who have newly acquired power.[121] Sexual harassment is more likely to occur when there are large power differentials.[122] The supervisor–employee dyad best characterizes an unequal power relationship, where formal power gives the supervisor the capacity to reward and coerce. Because employees want favorable performance reviews, salary increases, and the like, supervisors control resources most employees consider important and scarce. When there are no effective controls to detect and prevent sexual harassment, abusers are more likely to act. Relatedly, if there are no effective controls to give voice to whistleblowers and protect them from retaliation, abusers are more likely to act and continue to act.[123] The #MeToo and Time's Up movements were formed to establish a coalition giving voice to sexual harassment and abuse survivors to quell the tide of sexual harassment in organizations and communities.[124]

Sexual harassment can have a detrimental impact on individuals and the organization, but it can be avoided. The manager's commitment to the process and responsibility is critical:[125]

- Make sure an active policy defines what constitutes sexual harassment, informs employees they can be fired for inappropriate behavior, and establishes procedures for making complaints.
- Reassure employees that they will not encounter retaliation if they file a complaint.
- Investigate every complaint and inform the legal and HR departments.
- Make sure offenders are disciplined or terminated.
- Set up in-house training to raise employee awareness of sexual harassment issues.

The bottom line is that managers have a responsibility to protect their employees from a hostile work environment. They may easily be unaware that one of their employees is being sexually harassed, but being unaware does not protect them or their organization. If investigators believe a manager could have known about the harassment, both the manager and the company can be held liable.

Politics: Power in Action

13-6 Describe how politics work in organizations.

Whenever people get together in groups, power will be exerted. People in organizations want to carve out a niche to exert influence, earn rewards, and advance their careers. If they convert their power into action, we describe them as being engaged in *politics*. Those with good political skills will likely use their bases of power effectively.[126]

Political Behavior

Essentially, *organizational politics* focuses on the use of power to affect decision making in an organization, sometimes for self-serving and organizationally unsanctioned behaviors.[127] For our purposes, **political behavior** in organizations consists of activities that are not required as part of an individual's formal role but that influence or attempt to influence the distribution of advantages and disadvantages within the organization.[128] Political behavior gives people some sense of empowerment and control in highly political environments (but it can also be exhausting).[129]

political behavior Activities that are not required as part of a person's formal role in the organization but that influence, or attempt to influence, the distribution of advantages and disadvantages within the organization.

Political behavior is outside specified job requirements. It requires some attempt to use power bases. It includes efforts to influence the goals, criteria, or processes used for decision making. Our definition is broad enough to include varied political behaviors such as withholding key information from decision makers, joining a coalition, whistleblowing, spreading rumors, leaking confidential information to the media, exchanging favors with others for mutual benefit, and lobbying on behalf of or against a particular individual or decision alternative.[130] In this way, political behavior is often negative, but not always.

The Reality of Politics

Research has demonstrated that there are multiple ways people construe politics: (1) some are *reactive,* believing that it involves engaging in destructive and manipulative behavior; some are (2) *reluctant*, viewing it as a necessary evil; still others are (3) *strategic* and view politics as a useful way of getting things done; and finally, some have more of an (4) *integrated* perception, viewing politics as central to the reality of decision making.[131] Indeed, interviews with experienced managers show that most believe political behavior is a major part of organizational life.[133] Many managers report some use of political behavior is ethical if it does not directly harm anyone else. They describe politics as necessary and believe someone who never uses political behavior will have a hard time getting things done.

But why, you may wonder, must politics exist? Can it be possible for an organization to be politics-free? It is *possible*—if all members of that organization hold the same goals and interests, if organizational resources are not scarce, and if performance outcomes are completely clear and objective. But that does not describe the organizational world in which most of us live. Organizations have individuals and groups with different values, goals, and interests.[133] This sets up the potential for conflict over the allocation of limited resources, such as budgets, work space, and salary and bonus pools. If resources were abundant, all constituencies within an organization could satisfy their goals. But because they are limited, not everyone's interests can be satisfied. Furthermore, gains by one individual or group are often *perceived* as coming at the expense of others within the organization (whether they are or not). These forces create competition among members for the organization's limited resources. Regardless, it appears as if people, although often reluctant to engage in political behavior, will do so when it is done through prosocial means and with the goal of helping others.[134]

Maybe the most important factor leading to politics within organizations is the realization that most of the "facts" used to allocate limited resources are open to interpretation. When allocating pay based on performance, for instance, what is *good* performance? What is an *adequate* improvement? What constitutes an *unsatisfactory* job? It is in this large and ambiguous middle ground of organizational life—where the facts do not speak for themselves—that politics flourish. Because most decisions must be made in a climate of ambiguity—where the organizational reality is open to interpretation—people within organizations will use whatever influence they can to support their goals and interests. One person's "selfless effort to benefit the organization" is seen by another as a "blatant attempt to further" their own interests.[135]

Gossip and the Grapevine

grapevine An organization's informal communication network.

The informal communication network in a group or organization is called the **grapevine**.[136] Typically, the grapevine and gossip are viewed negatively by most people.[137] Indeed, research shows that untrustworthy gossip can cause people to unfairly judge and dislike others.[138] Overall, the grapevine is a mixed blessing, leading to positive performance because of the sense of social pressure it produces while also undermining employee well-being.[139] Furthermore, rumors and gossip transmitted through the grapevine may play an important role in transmitting information, exercising political will, and navigating the hierarchy.[140] Grapevine or word-of-mouth information from peers about a company has important effects on whether job applicants join an organization,[141] even over and above informal ratings on websites like Glassdoor. For employers, it is also a way to recruit from within the employees' own networks: For example, the TWT Group (a Canadian IT firm) recruits potential applicants from within their own networks, who they know and trust.[142]

Managers can study the gossip driven largely by employee social networks to learn more about how positive and negative information is flowing through the organization.[143] Furthermore, managers can identify influencers (highly networked people trusted by their coworkers[144]) by noting which individuals are small talkers (those who regularly communicate about insignificant, unrelated issues). Small talkers tend to be influencers and are significantly more likely to retain their jobs during layoffs.[145] Furthermore, one study used AI to detect small talk and follow-up questions during one-on-one conversations and was able to demonstrate that follow-up questions predicted liking and intentions to continue to have conversations with that person in the future.[146] However, the way "small talkers" go about their deeds matters: Collaborating and helping with others, rather than gossip, tend to be related to earning a "central position" in the network.[147] Regardless, being an active, helpful participant in the grapevine appears to help.[148] It can even help entrepreneurs doing business in new countries face the challenges of being labeled as an "outsider," gaining legitimacy through attempting to be a part of local networks and communities.[149]

Thus, while the grapevine may not be sanctioned or controlled by the organization, it can be understood and leveraged a bit.

The Causes and Consequences of Political Behavior

13-7 Identify the causes, consequences, and ethics of political behavior.

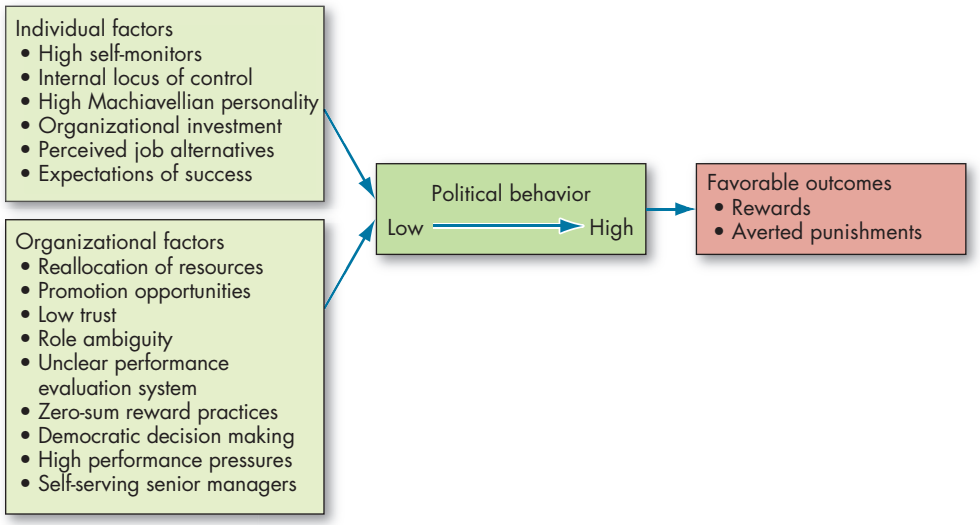
Now that we have discussed the constant presence of politics in organizations, let us discuss the causes and consequences of these behaviors.

Factors Contributing to Political Behavior

Not all groups or organizations are equally political. In some organizations, politics are overt and rampant, while in others, politics play a small role in influencing outcomes. Why this variation? Research has identified several factors that appear to encourage political behavior. Some are individual characteristics, derived from employees' qualities; others are a result of the organization's culture or internal environment. Exhibit 13-5 illustrates how both individual and organizational factors can encourage political behavior and provide favorable outcomes (increased rewards and averted punishments) for individuals and groups in the organization.

Individual Factors At the individual level, researchers have identified certain personality traits, needs, and other factors likely to be related to political behavior. In terms of traits, we find that employees who are high self-monitors,

Exhibit 13-5 Factors That Influence Political Behavior



possess an internal locus of control, and have a high need for power (see the chapter on motivation theory) are more likely to engage in political behavior. The high self-monitor is more sensitive to social cues, exhibits higher levels of social conformity, and is more likely to be skilled in political behavior than the low self-monitor. Because they believe they can control their environment, individuals with an internal locus of control are more prone to take a proactive stance and attempt to manipulate situations in their favor. Not surprisingly, the Machiavellian personality trait (see the chapter on personality and individual differences)—characterized by the will to manipulate and the desire for power—is consistent with using politics to further personal interests.

An individual's investment in the organization and perceived alternatives influence the degree to which they will pursue illegitimate means of political action.[150] The more a person expects increased future benefits from the organization and the more that person has to lose if forced out, the less likely they are to use illegitimate means. Conversely, the more alternate job opportunities an individual has—due to a favorable job market, possession of scarce skills or knowledge, a prominent reputation, or influential contacts outside the organization—the more likely the person is to employ politics. An individual with low expectations of success from political means is unlikely to use them. High expectations from such measures are most likely to be the province of both experienced and powerful individuals with polished political skills and inexperienced employees who misjudge their chances.

Finally, some individuals engage in more political behavior because they simply are better at it. Such individuals read interpersonal interactions well, fit their behavior to situational needs, and excel at networking.[151] These people are often indirectly rewarded for their political efforts. For example, a study of a construction firm in southern China found that politically skilled subordinates were more likely to receive recommendations for rewards from their supervisors and that politically oriented supervisors were especially likely to respond positively to politically skilled subordinates.[152] Other studies have also shown that higher levels of political skill are associated with higher levels of perceived job performance.[153]

Organizational Factors Although we acknowledge the role that individual differences can play, the evidence more strongly suggests that certain situations and contexts promote politics. Specifically, when an organization's resources are declining, when the existing pattern of resources is changing, and when there is opportunity for promotions, political behavior is more likely to surface.[154] When resources are reduced, people may engage in political actions to safeguard what they have. Also, *any* changes, especially those implying significant reallocation of resources within the organization, are likely to stimulate conflict and increase political behavior.

Cultures characterized by low trust, role ambiguity, unclear performance evaluation systems, democratic decision making, high pressure for performance, and self-serving senior managers will also create breeding grounds for political behavior.[155] Because political activities are not required as part of the employee's formal role, the greater the role ambiguity, the more employees can engage in unnoticed political activity. Role ambiguity means that the prescribed employee behaviors are not clear. In this situation, there are fewer limits to the scope and functions of the employee's political actions.

The more an organizational culture emphasizes the zero-sum or win–lose approach to reward allocations (which often begins as a result of financial vulnerability), the more employees will be motivated to engage in political behavior.[156] The **zero-sum approach** treats the reward "pie" as fixed, so any gain one person or group achieves comes at the expense of another person or group. For example, if $15,000 is distributed among five employees for raises, any employee who gets more than $3,000 takes money away from one or more of the others. Such a practice encourages making others look bad and increasing the visibility of what you do.

zero-sum approach An approach to reward allocation that treats the reward "pie" as fixed so that any gains by one individual are at the expense of another.

Factors Contributing to Political Behavior Acquiescence

In many ways, political behavior is a very interpersonal phenomenon. It involves interaction between two or more people, with one or more of these people attempting to influence the others to do something. Professor Robert Cialdini has devoted much of his career to identifying the social forces behind how people can be influenced. These are not individual differences (like those discussed earlier) or contextual features of the environment that influence who "succumbs" to political behavior—rather, they are social forces underlying our shared humanity that can drive us to acquiesce to another's influence attempt. Cialdini outlined a number of these evidence-based forces as the Six (now Seven) Principles of Persuasion.[157] Many of these may seem familiar to you—indeed, they are common social forces that have a substantial impact on behavior in organizations.

- ***Reciprocity:*** People are motivated to give back to others who have done something for them.
- ***Consistency/commitment:*** People are motivated to remain consistent with and committed toward decisions or choices they have already made.
- ***Social proof:*** People look to others for proof, verification, and validation that they have acted in the right way.
- ***Liking:*** People who like one another tend to agree with one another.
- ***Authority:*** People are more likely to say yes to requests from power-holders.
- ***Scarcity:*** People want more of what is not as available or that which is becoming less available.
- ***Unity:*** The newest principle of persuasion: People are most influenced by those with whom they identify.

How Do People Respond to Organizational Politics?

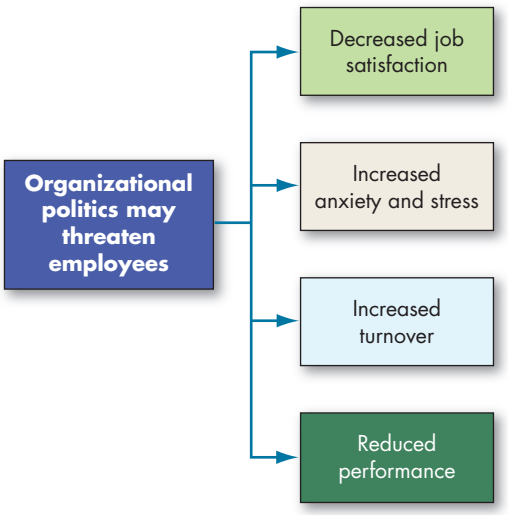
Kai loves working as a writer on a weekly U.S. television comedy series but hates the internal politics. "A couple of the writers here spend more time kissing up to

the executive producer than doing any work. And our head writer clearly plays favorites. While they pay me a lot and I get to really use my creativity, I'm sick of having to be on alert for backstabbers and constantly having to self-promote my contributions. I'm tired of doing most of the work and getting little of the credit." We all likely know friends or relatives like Kai who regularly complain about the politics at their jobs. But how do people in general react to organizational politics? Let's look at the evidence.

In general, most people view politics in one of four ways: (1) as *destructive* and *manipulative,* (2) as a *necessary evil,* (3) as a *useful strategy* to get things done, and (4) as an *immutable aspect* of organizational life.[158] Regardless, for most people who are unwilling to play the politics game, outcomes tend to be predominantly negative. See Exhibit 13-6 for a diagram of this situation, illustrating how politics lead to decreased job satisfaction, increased anxiety and stress, increased turnover, and reduced performance. Research has demonstrated that the more politics play a role in one's environment, organization, or team, the more negative outcomes will be experienced (e.g., increased stress and turnover intentions as well as decreased morale and performance), regardless of how necessary people perceive them to be.[159] Politics may lead to self-reported declines in employee performance, perhaps because employees perceive political environments to be unfair, which demotivates them.[160]

The politics–performance relationship appears to be affected by an individual's understanding of the "hows" and "whys" of organizational politics. Researchers noted, "An individual who has a clear understanding of who is responsible for making decisions and why they were selected to be the decision makers would have a better understanding of how and why things happen the way they do than someone who does not understand the decision-making process in the organization." When both politics and understanding are high, performance is likely to increase because these individuals see political activity as an opportunity. This is consistent with what you might expect for individuals with well-honed political skills. But when understanding is low, individuals are more likely to see politics as a threat, which can have a negative effect on job performance.[161]

Exhibit 13-6 Employee Responses to Organizational Politics



Myth or Science?

Office Politics Should Be Avoided Altogether

Office politics have a terrible reputation. When employees perceive their workplace as more political, it is not surprising that they are seen as less engaged, less productive, and more likely to quit. Employees are in part justified in their dislike of office politics. Bad politics (such as spreading rumors or using other strategies to advance oneself at the expense of others or the organization) can undoubtedly be very harmful and should be avoided.

Yet office politics are often unavoidable. Whether or not employees choose to participate in them, office politics often shape teams and, ultimately, their work. Furthermore, politics are not all bad, and good politics can serve a higher purpose without the damaging effects we often assume they have. In fact, politics can be used to advance one's interests, gain recognition for your contributions, affect how others think, and inform critical decisions. Competency on four dimensions of political skill (e.g., emotional intelligence, interpersonal influence skill, networking ability, and apparent sincerity or authenticity) also improves leadership, promotion prospects, and performance. Political skill can even be an asset for those who may be less extroverted or not the most knowledgeable person in the room.

While bad politics should certainly be avoided, avoiding office politics altogether can have adverse outcomes. For example, one study found that less politically skilled managers had employees who were less engaged when the managers told them what to do and provided feedback. In contrast, employees with politically skilled managers viewed these same behaviors more favorably. Thus, instead of abandoning office politics, individuals should focus on cultivating political skills that will benefit their careers, teams, and organizations.[162]

defensive behaviors Reactive and protective behaviors to avoid action, blame, or change in a political environment.

When employees see change as a threat, they may respond with **defensive behaviors**—reactive and protective behaviors to avoid action, blame, or change.[163] (Exhibit 13-7 provides some examples.) These behaviors can be a part of political behavior, but in a destructive, negative sense. Instead of attempting to influence people in "soft," bond-affirming ways, these behaviors protect self-interests through aggressive or avoidant means. In the short run, employees may find that defensiveness protects their self-interest, but in the long run, it wears them down. However, employees who have been bullied, harassed, or victimized should take action to defend themselves—we are more specifically referring to defensive behaviors many engage in to cling to power for self-interested aims.

Voice and Silence

voice Discretionary communication of suggestions, concerns, or opinions about work-related issues to people who might be able to take appropriate action.

Voice **Voice** refers to informal, discretionary communication of suggestions, concerns, or opinions about work-related issues to people who might be able to take appropriate action.[164] Voice is important because it highlights the influence capabilities of people who may not hold formal leadership positions or operate from substantial bases of power. By definition, voice is a form of influence—it challenges the status quo, supports others' viewpoints, adds constructively, or is defensive or destructive.[165] It also reaffirms the employee experience—by giving voice to others, is space for people to share their concerns and ideas in a way that contributes to the organization and crafts a fair, equitable work environment.

Voice may be affected by employees' self-evaluation, personal initiative, sense of responsibility, and engagement as well as workplace climate and the emotions and behavior of their supervisor.[166] Moreover, of the Big Five personality traits, extroverted, open, and conscientious people tend to be more likely to voice their concerns.[167] Research shows that voice has a beneficial effect on

Exhibit 13-7 Defensive Behaviors

Avoiding Action

Overconforming. Strictly interpreting your responsibility by saying things like "The rules clearly state..."or "This is the way we've always done it."

Buck passing. Transferring responsibility for the execution of a task or decision to someone else.

Feigning ignorance. Avoiding an unwanted task by falsely pleading ignorance or inability.

Stretching. Prolonging a task so that one person appears to be occupied—for example, turning a two-week task into a 4-month job.

Stalling. Appearing to be more or less supportive publicly while doing little or nothing privately.

Avoiding Blame

Bluffing. Rigorously documenting activity to project an image of competence and thoroughness, known as "covering your rear."

Playing safe. Evading situations that may reflect unfavorably. It includes taking on only projects with a high probability of success, having risky decisions approved by superiors, qualifying expressions of judgment, and taking neutral positions in conflicts.

Justifying. Developing explanations that lessen one's responsibility for a negative outcome and/or apologizing to demonstrate remorse, or both.

Scapegoating. Placing the blame for a negative outcome on external factors that are not entirely blameworthy.

Misrepresenting. Manipulation of information by distortion, embellishment, deception, selective presentation, or obfuscation.

Avoiding Change

Prevention. Trying to prevent a threatening change from occurring.

Self-protection. Acting in ways to protect one's self-interest during change by guarding information or other resources.

organizational performance. Reviews of research with more than fifty thousand employees suggest that leadership and managerial practices that encouraged employee voice resulted in heightened job performance.[168] Furthermore, research on employee voice behaviors suggests that voice concerns about problems have positive emotional outcomes for employees.[169] Clearly, there can be benefits for providing employees with a way to get things that are bothering them about work "off their chest."

Managers often have their preferences for "how" employees engage in voice behavior. For instance, managers can often find "public" voice to be threatening to their image or to their personal control and prefer if it were expressed one-on-one.[170] Moreover, if employees' voice is not considered, employees may be more reluctant to speak up in the future. Managers should provide reasons for why they did not follow through to foster psychological safety and maintain justice perceptions.[171] The culture also matters—there are different norms and values (e.g., power distance; see the chapter on diversity, equity, and inclusion in organizations) that signal whether it is safe and effective for employees to speak up, and some cultures do not value open employee communication as much as others.[172] These norms and values do not necessarily stem from national or ethnic cultures—organizational culture beliefs (e.g., valorizing masculinity, minimizing harassment seriousness) and network characteristics (e.g., networks composed mostly of men in central positions) can limit voice in the face of sexual harassment.[173]



Employees at German construction firm Hochtief staged a protest over a potential takeover bid by another firm. Hochtief's employees were exercising voice to demonstrate their opinion on the potential takeover.
Source: Bernd Thissen/dpa/picture-alliance/Newscom

Silence It is easy to ignore silence because it is defined by the absence of influence. However, this is often a mistake—silence itself can be a form of influence, communicating noninterest, the inability to deal with a topic, or a desire to cooperate smoothly without interruption.[174] **Silence**, similar to the definition of voice, suggests that it involves the discretionary *withholding* of suggestions, concerns, or opinions about work-related issues from those who might be able to do something about it.[175]

silence Discretionary withholding of suggestions, concerns, or opinions about work-related issues from people who might be able to take appropriate action.

Why are employees and managers silent even when they probably should speak up? The answer to this question appears to be a complicated calculus of the person's individual differences and motivations and (automatic and strategic) decision-making processes. Moreover, whether one chooses to stay silent is also affected by the content of the message, the style in which it is delivered, and the target of the message.[176] Perceptions of target openness and trustworthiness and an employee sense of powerlessness as well as a tendency to experience negative emotions (especially fear) tend to influence the decision to stay silent.[177] Managers and employees alike should try to forge an environment where people are comfortable sharing, feel empowered to share, and are open to other thoughts and opinions, even to bad news.[178]

Furthermore, the environment should be one in which silence is not rewarded or voice is punished. For instance, even managers who speak up about wrongdoing in organizations can be subject to not only official sanctioning but also bullying, reduced job satisfaction, and status perceptions.[179] But sometimes it is not just the environment but the interpersonal dynamics that get in the way. For instance, employees can feel like they have their voice "needs" met when they voice their concerns with employees (e.g., venting sessions) and, as a result, neglect to say anything to their managers or supervisors.[180] Finally, some forms of silence are strategic. For instance, executives are less likely to publicize or market their sustainability certifications in the midst of scandals that contradict their sustainability standards (out of a fear of coming off as hypocritical).[181]

For whatever reasons (and there are many of them, including fear, resignation, and even prosocial motives),[182] research suggests using silence and withholding communication are common and problematic.[183] It is an especially uncomfortable burden when managers and employees feel *obligated* to speak up but feel like they are not able to do so.[184] It can also be problematic for the *recipients* of silence. For instance, in one series of experiments, people who were ostracized and excluded felt worse when they were not acknowledged at all. Even when they were still excluded, a simple nonverbal acknowledgement or a message (even a hostile one!) increased their satisfaction and recovery from the stressful event.[185] Moreover, people engage in attribution processes as the recipients of silence and often see those who withhold information as unethical (while the person staying silent thinks they are acting ethically—it is better to say nothing than to say something they might regret!).[186] Clearly, silence may be characterized by a great deal of *impression management*, which we discuss next.

Impression Management

We know people have an ongoing interest in how others perceive and evaluate them. Being perceived positively by others has benefits in an organizational setting, and it is a process that involves interacting with people, not just one person in isolation.[187] It might, for instance, help us initially to get the jobs we want in an organization and, once hired, to get favorable evaluations, salary increases, and more rapid promotions. Managers may use it to protect their reputations during communications with investors and board members (e.g., earnings forecasts),[188] to appear authentic and trustworthy to followers (e.g., through humorous self-disclosures),[189] or to allay public fears during times of crisis—remaining calm and composed.[190] Managing how others perceive them is especially important, for example, to expatriates representing their organizations in other countries and requires them to adapt to cultural norms.[191] The process by which individuals attempt to control the impressions that others form of them is called **impression management (IM)**.[192] See Exhibit 13-8 for examples.

impression management (IM) The process by which individuals attempt to control the impressions that others form of them.

This process can be conscious or unconscious and can be perceived as authentic or disingenuous.[193] When perceived as inauthentic or disingenuous, IM can lead to decrements in performance, increased anxiety, and negative feelings.[194] When perceived as modest, authentic, and genuine (e.g., disclosing something negative and humorous about yourself to relate with another person), IM can lead others to see you more positively and lead to better relationship outcomes.[195] Furthermore, IM behaviors themselves can be the norm in organizations, groups, or teams[196]—but this does not mean that members of the organization will stop trying to discern whether the behaviors are authentic.

IM may also lead to negative effects for the individual engaging in it.[197] For instance, executives in top management teams who ingratiate themselves to the CEO tend to become resentful of the CEO and plot to undermine them, especially when the CEO is a woman or from an underrepresented ethnicity.[198] Moreover, ingratiation not only breeds anxiety and resentment—it can also lead to exhaustion and depletion of personal resources, which can in turn lead to deviant behavior.[199] The negative outcomes are especially apparent for leaders and managers—given that they are beholden to multiple audiences (e.g., the general public, the board of directors, other executives, middle managers, employees), their IM attempts, while successful toward some, will inevitably be viewed negatively by at least one party.[200]

Exhibit 13-8 Impression Management (IM) Techniques

Conformity

Agreeing with someone else's opinion to gain their approval is a *form of ingratiation.*

Example: A manager tells their supervisor, "You're absolutely right on your reorganization plan for the western regional office. I couldn' t agree with you more."

Favors

Doing something nice for someone to gain that person' s approval is a *form of ingratiation.*

Example: A salesperson says to a prospective client, "I've got two tickets to the theater tonight that I can't use. Take them. Consider it a thank-you for taking the time to talk with me."

Excuses

Explaining a predicament-creating event aimed at minimizing the apparent severity of the predicament is a *defensive IM technique.*

Example: A sales manager says to their supervisor, "We failed to get the ad in the paper on time, but no one responds to those ads anyway."

Apologies

Admitting responsibility for an undesirable event and simultaneously seeking to get a pardon for the action is a *defensive IM technique.*

Example: An employee says to their supervisor, "I'm sorry I made a mistake on the report. Please forgive me."

Self-Promotion

Highlighting your best qualities, downplaying your deficits, and calling attention to your achievements is a *self-focused IM technique.*

Example: A salesperson tells their supervisor, "Micah worked unsuccessfully for three years to try to get that account. I sewed it up in six weeks. I'm the best closer this company has."

Enhancement

Claiming that something you did is more valuable than most other members of the organizations would think is a *self-focused IM technique.*

Example: A journalist tells their editor, "My work on this celebrity divorce story was really a major boost to our sales" (even though the story only made it to page 3 in the entertainment section).

Flattery

Complimenting others about their virtues in an effort to make yourself appear perceptive and likeable is an *assertive IM technique.*

Example: A new sales trainee says to their peer, "You handled that client's complaint so tactfully! I could never have handled that as well as you did."

Exemplification

Doing more than you need to in an effort to show how dedicated and hard working you are is an *assertive IM technique.*

Example: An employee sends an e-mail from a work computer while working late so that the supervisor will know how long they have been working.

Source: Based on M. C. Bolino, K. M. Kacmar, W. H. Turnley, and J. B. Gilstrap, "A Multi-Level Review of Impression Management Motives and Behaviors," *Journal of Management* 34, no. 6 (2008): 1080–109.

Research has primarily examined IM techniques in two different organizational contexts: interview success and performance evaluations. Let's consider each of these.

Interviews and IM The evidence indicates most job applicants and interviewers alike use IM techniques in interviews and that it works,[201] in part because they increase interviewer perceptions of the applicants' warmth and competence.[202] Interviewers are, for the most part, surprisingly unable to detect when an

individual is engaging in IM, especially when applicants are using deception to engage in IM.[203] To develop a sense of how effective different IM techniques are in interviews, one study grouped data from thousands of recruiting and selection interviews into appearance-oriented efforts (like looking professional), explicit tactics (like flattering the interviewer or talking up your own accomplishments), and verbal cues (like using positive terms and showing general enthusiasm).[204] Across all the dimensions, it was quite clear that IM was a powerful predictor of how well people did. However, there was a twist. When interviews were highly structured, meaning the interviewer's questions were written out in advance and focused on applicant qualifications, the effects of IM were substantially weaker. Manipulative behaviors like IM are more likely to have an effect in ambiguous and unstructured interviews. In addition, the effectiveness of IM depends on the applicants' ability to correctly identify what traits or skills the interviewer is looking for.[205] However, we should note that deceptive IM is not necessarily something that is carefully and coldly planned. Research suggests that some people have less humility or are more extroverted than others, and when put in an anxiety-inducing context, they may talk more often and more boastfully.[206]

Performance Evaluations and IM In terms of performance evaluations, the picture is quite different. Indeed, both employees, managers, and executives alike engage in IM when newly hired and throughout the rest of their tenure with the organization.[207] Ingratiation is positively related to performance ratings and reward allocations, meaning those who ingratiate themselves with their supervisors get higher performance evaluations and (potentially) raises.[208] However, self-promotion appears to backfire over time as people begin to recognize the behavior: Those who self-promote actually may receive *lower* performance ratings.[209] There is an important qualifier to these general findings. It appears that individuals high in

An Ethical Choice

How Much Should You Manage Interviewer Impressions?

Almost everyone agrees that dressing professionally, highlighting previous accomplishments, and expressing interest in the job are reasonable IM tactics to improve your presentation in an interview. Strategies like using positive nonverbal cues such as smiling and nodding are also often advised.

Is there an upside to such IM? Research generally shows there is. The more effort applicants put into highlighting their skills, motivation, and admiration for the organization, the more likely they will be hired. A study in Taiwan examined this relationship, finding that interviewers saw applicants who talked confidently about their qualifications as a better fit for the job and applicants who said positive things about the organization as a better fit for the organization. Positive nonverbal cues improved interviewer moods, which also improved the applicant's ratings.

Despite evidence that trying to impress an interviewer can pay off, you can go too far. Evidence that a person misrepresented qualifications in the hiring process is usually grounds for immediate termination. Even so-called harmless lies are a problem if they create unfounded expectations. For example, if you noted that you managed budgets when all you were doing was tracking expenditures, you lack skills your boss will expect you to have. When you fail to deliver, it will look terrible for you. However, if you describe your experience more accurately but note your desire to learn, the company will know that you need additional training and that you will need a bit of extra time.

So what does an ethical, effective interview strategy entail? The key is to find a positive but truthful way to manage impressions. Do not be afraid to let an employer know about your skills and accomplishments, and be sure to show your enthusiasm for the job. At the same time, keep your statements as accurate as possible, and be careful not to overstate your abilities. In the long run, you are much more likely to be happy and prosperous in a job where both you and the interviewer can assess fit honestly.[210]

political skill are able to translate IM into higher performance appraisals, whereas those lower in political skill are more likely to be hurt by their IM attempts.[211] One study of 760 boards of directors found that individuals who ingratiated themselves with current board members (e.g., expressed agreement with the director, pointed out shared attitudes and opinions, complimented the director) increased their chances of landing on a board.[210] Another study found that interns who attempted to use ingratiation with their supervisors were usually disliked—unless they had high levels of political skill. For those who had this ability, ingratiation led to higher levels of liking from supervisors and higher performance ratings.[213]

Are our conclusions about responses to politics valid around the world? Should we expect employees in Israel, for instance, to respond the same way to workplace politics that employees in the United States do? Almost all our conclusions on employee reactions to organizational politics are based on studies conducted in North America. The few studies that have included other countries suggest some minor modifications.[214] One study of managers in U.S. culture and three regions in East Asia (People's Republic of China, Hong Kong, and Taiwan) found U.S. managers evaluated "gentle persuasion" tactics such as consultation and inspirational appeal as more effective than did their counterparts in any of the three East-Asian regions.[215] Other research suggests effective U.S. leaders achieve influence by focusing on the personal goals of group members and the tasks at hand (an analytical approach), whereas influential East Asian leaders focus on relationships among group members and meeting the demands of people around them (a holistic approach).[216] Another study of Chinese supervisors and subordinates found that subordinates were seen as more agreeable and conscientious when they engaged in self-effacing behaviors, but only if these behaviors made them appear modest rather than supplicating.[217]

The Ethics of Behaving Politically

Although there are no clear-cut ways to differentiate ethical from unethical political behavior, there are some questions you should consider. For example, what is the utility of engaging in political behavior? Sometimes we do it for little good reason or disregard for the situation. For instance, the popular press abounds with rigid platitudes that are hardly useful in every work situation (e.g., "don't complain," "arrive early and stay late," "under-promise and over-deliver").[218] One thing to keep in mind is whether it is worth the risk. Another question is whether the utility of engaging in the political behavior will balance out harm (or potential harm) to others. Complimenting a supervisor to curry favor is probably much less harmful than grabbing credit for a project that others deserved. Finally, does the political behavior conform to justice and fairness standards? Could anyone reasonably reject your behavior?

Unfortunately, powerful people can become very good at explaining self-serving behaviors in terms of the organization's best interests. They can persuasively argue that unfair actions are really fair and just. Those who are powerful, articulate, and persuasive are most vulnerable to ethical lapses because they are more likely to get away with them. When faced with an ethical dilemma regarding organizational politics, try to consider whether playing politics is worth the risk and whether others might be harmed in the process. If you have a strong power base, recognize the ability of power to corrupt. Remember that it is a lot easier for the powerless to act ethically, if for no other reason than they typically have very little political discretion to exploit.

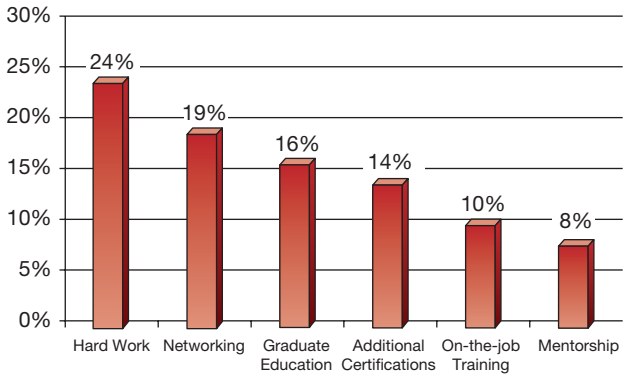
Mapping Your Political Career

As we have seen, politics is not just for politicians. You can use the concepts presented in this chapter in some very tangible ways in your organization. However, they also have another application: you. In considering the OB Poll,

OB POLL

Networking Key Factor in Employee Advancement

Which of the following do you think would most help you get a better job or a promotion?





Source: Based on CNBC-SurveyMonkey, *Workplace Happiness Index,* July 2019, https://www.surveymonkey.com/curiosity/cnbc-workplace-happiness-index-july-2019/; see also J. Andrews, "Working Hard No Longer Enough to Get a Promotion. Here's How to Stand Out," *CNBC*, July 19, 2019, https://www.cnbc.com/2019/07/19/working-hard-is-not-enough-to-get-a-promotion-heres-how-to-stand-out.html

you may think that if you work hard, advancement should come easy. However, there is a different way to think about this, as professor Bud Bilanich of the University of Denver notes: "Working hard . . . isn't going to be enough because your competition is also working hard and making contributions." "To me, I think that hard work . . . is kind of like the price of admission."[219] The second most critical factor highlights the role of politics in making your hard work pay off: politics.

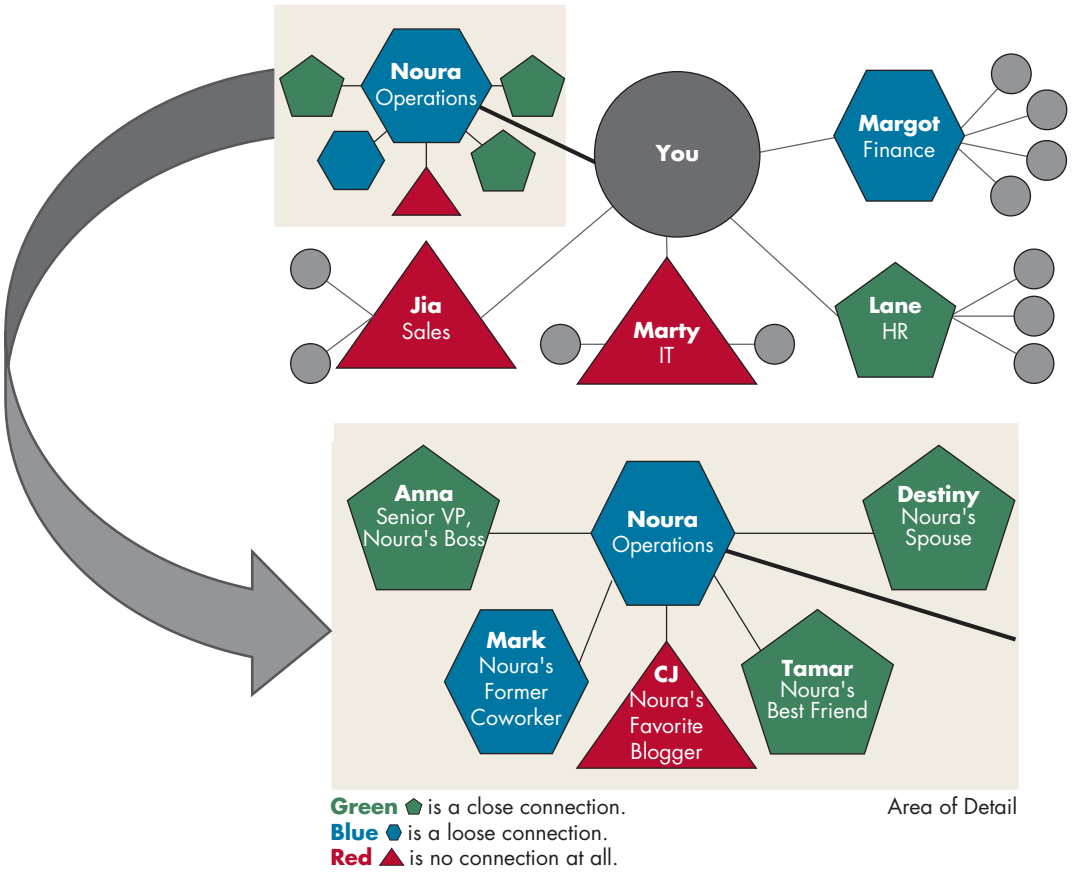
One of the most useful ways to think about power and politics is in terms of your own career.[220] What are your ambitions? Who has the power to help you achieve them? What is your relationship to these people? The best way to answer these questions is with a political map, which can help you sketch out your relationships with the people on whom your career depends. Exhibit 13-9 contains such a political map.[221] Let us walk through it.

Assume your future promotion depends on five people, including Noura, your immediate supervisor. As you can see in the exhibit, you have a close relationship with Noura (you would be in trouble otherwise). You also have a close relationship with Margot in finance. However, with the others, you have either a loose relationship (Lane) or none (Jia, Marty). One obvious implication of this map is the need to formulate a plan to gain more influence over and a closer relationship with these people. How might you do that?

One of the best ways to influence people is indirectly. What if you played in a tennis league with Mark, Noura's former coworker who you know remains friends with Noura? To influence Mark, in many cases, may also be to influence Noura. You can complete a similar analysis for the other four decision makers and their networks. Of course, this map does not show you everything you need to know—no map does. For example, rarely would all five people have the same amount of power. Maps are also harder to construct in the era of large social networks.

All of this may seem a bit Machiavellian to you. However, remember that only one person gets the promotion, and your competition may have a map of their own. As we noted in the early part of the chapter, power and politics are part of organizational life.

Exhibit 13-9 Drawing Your Political Map



Source: Based on D. Clark, "A Campaign Strategy for Your Career," *Harvard Business Review* (November 2012): 131–4.

Summary

Both power and politics are inherent parts of organizational life. Despite their negative connotations and association with unethical behavior, they are not always immoral. In many ways, power and political influence are significant aspects of effective leadership. Although there are some differences between power and leadership, both often go together, with many leaders also operating from positions of power. In this chapter, we began by describing power and its many forms, both formal and informal. We described dependence as the primary key to power, operating through the scarcity, importance, and nonsubstitutability of resources. These resources, in turn, flow through various social network structures, and people's positions in these networks have implications for power. In the next part of the chapter, we discuss politics and influence. We suggest that the domain of leadership is precisely the same as influence: As defined in the chapter on leadership, leadership is the practice of influence. However, not all influence tactics are created equally. We discuss a number of the various influence tactics that have been studied by OB researchers and compare their effectiveness (and ethicality). We discuss how people process influence attempts both

automatically and in a controlled fashion depending on the context, message, and circumstances. Acquiescence to influence can also be a function of many social forces (e.g., Cialdini's Principles of Persuasion). Political behavior can also be predicted by several individual and contextual factors, resulting in both desirable and undesirable outcomes. For instance, we describe how people are more or less skilled and motivated at political influence—but nevertheless, it is a skill that can be learned. After establishing these foundations, we close the chapter by discussing the significant implications of both power and politics. Power creates power dynamics, at times resulting in appalling conditions and unethical behavior in organizations (e.g., sexual harassment, bullying, gossip). People generally respond to politics negatively, although they are clearly an inevitable part of work. For instance, workers and managers alike will always engage in IM depending on the situation, and they will always be navigating decisions of exercising voice or remaining silent about issues that affect them. These organizational realities highlight that although we often consider politics and influence to be unethical, sometimes remaining silent and doing nothing can be construed as just as unethical.

Implications for Managers

- Consider cultivating multiple bases of power and selectively (yet ethically) drawing upon them when the situation calls for it.
- In managing your business, unit, team, or career, consider the network of dependence and communication (e.g., the grapevine) between people and organizations and use this information to guide strategic decisions.
- As a manager, inspirational appeals work very well in inspiring subordinates toward a common goal. As an employee, rational persuasion is the most effective approach when managing upward, and ingratiation is most effective with coworkers.
- In general, it is best to avoid pressure tactics and defensive behaviors.
- The sequencing of influence tactics matters—it is better to start with "softer" influence tactics (e.g., inspirational appeals) and move to "harder" tactics (e.g., coalitions) if the softer tactics fail.
- Understand that people process influence attempts both automatically and in a controlled fashion—leverage your influence attempts in a way that accommodates and recognizes both types of processing.
- Influence and politics are skills to be learned—work to develop your skill and cultivate motivation for political influence.
- There is some evidence that power corrupts. Always be mindful of your situation and behavior to avoid sliding down the slippery slope of unethical behavior.
- To combat a hostile work environment, develop policies, practices, and procedures that are clear and explicit about inappropriate behavior, bar retaliation toward whistleblowers, investigate complaints, involve both the HR and legal departments, establish punitive measures for transgressors, and implement training and development for employees to recognize and confront inappropriate behavior.
- For those reluctant to engage in politics, try to reframe the behavior (to yourself or to others) as prosocial or to help others.
- To reduce the likelihood of problematic political behavior, try to reframe resource allocation fairly, avoiding a zero-sum approach where possible.
- Both voice and silence are strategic influence behaviors—although they may be more or less appropriate depending on the situation, in general, voice is a preferable behavior, and silence can be a damaging behavior. Try to foster an environment where people feel safe sharing and voicing their concerns and avoiding environments that dissuade people from sharing.
- Everyone engages in IM to some extent, and it can be very effective earlier on in a business relationship. However, as time passes, others may be more likely to recognize that you are using these techniques, and they can backfire.
- Pick your battles. Not all situations require political behavior to be solved. Whenever confronted with a situation that might require political influence, ask yourself several questions. Is it worth it? Can others be harmed by my political behavior? Can I engage in political behavior while also following standards for justice and ethics?

Emphasize the Strategies Women Can Use to Get Ahead

POINT

Gender bias and a lack of women in leadership positions continue to be significant issues. For example, in 2020, women held just 38 percent of entry-level management positions while men held 62 percent. Women of color, in particular, are underrepresented in senior management positions, with 19 percent of C-suite positions held by White women and just 3 percent held by women of color. Despite the underrepresentation of women in leadership positions, there are strategies that women can employ to advance into leadership positions.

For instance, Hewlett-Packard carried out a study to determine why more women are not in managerial positions. The results showed that men tended to apply for a promotion if they believed they had met 60 percent of the criteria. In comparison, women tended to doubt their qualifications unless they had met 100 percent of the criteria. The takeaway is that women should not hesitate to promote themselves and apply for more advanced positions. Even if they may not meet all the criteria, these gaps can be framed not as weaknesses but as a desire to grow and learn.

Another obstacle that women face with career advancement is a lack of quality feedback. Although women ask for feedback as frequently as men, they are less likely to receive it. When women do receive feedback, it is usually less specific. The result is that when women receive vague feedback, they are more likely to receive lower performance ratings. Because the specific actions or behaviors that need to be changed are not identified, it is difficult for women to know what to do differently. How then can women receive more detailed feedback? Research indicates that highly self-aware individuals solicit feedback from a small circle (who are actively interested in their success and have a track record of honesty). The self-awareness that can be developed through better feedback can translate into better communication and stronger relationships and ultimately help individuals be more effective leaders. By employing the strategies mentioned, women can take tangible steps toward advancing their careers.

COUNTERPOINT

Rather than expecting women to learn strategies to navigate biased systems and structures, we should be focused on changing these systems and structures. For example, data from the Working Mother Research Institute found that 48 percent of men report having received detailed information on career paths to more senior positions. In comparison, just 15 percent of women reported receiving this type of information. Also, 54 percent of men had a career discussion with a mentor or sponsor in the last twenty-four months, while 39 percent of women did. The inequality in receiving sponsorship and mentorship between men and women is a fundamental reason women do not advance at the same rate as men and why they leave positions. As a result, individual women's strategies can only go so far if there are no formal policies and procedures that define the behaviors, expectations, and steps for sponsorship.

Furthermore, two surveys from 2018 by Lean In and Bloomberg Media indicate that some men have begun to avoid professional work relationships with women. They avoid professional working relationships because of the series of high-profile workplace sexual harassment and assault allegations. Thus, it is even more crucial that organizations do not just expect individuals in senior positions to seek out individuals to mentor or sponsor on their own.

Yet another significant systemwide barrier is the family leave policies that often penalize women with children. For example, the average length of paid leave offered at the top U.S. medical schools is only eight weeks. Family leave policies, in general, are often left to the discretion of departments. Unfortunately, shorter leaves have the potential to lower motivation, increase burnout, and ultimately hurt the retention of female physicians. The impact can be seen in the number of women advancing within the medical field. Even though women make up most students enrolled in medical school, they only make up 34 percent of physicians in the United States. Also, just 18 percent of hospital CEOs and 16 percent of all deans and department chairs are women. Thus, the onus must be placed on organizations to make systematic changes that provide greater access and opportunities for women to advance in their careers.[222]

CHAPTER REVIEW

QUESTIONS FOR REVIEW

13-1 How is leadership different from power?

13-2 What are the similarities and differences among the five bases of power?

13-3 What is the role of dependence in power relationships?

13-4 What power or influence tactics and their contingencies are identified most often?

13-5 What are the causes and consequences of abuse of power?

13-6 How do politics work in organizations?

13-7 What are the causes, consequences, and ethics of political behavior?

APPLICATION AND EMPLOYABILITY

Power and politics are an important part of organizational behavior. Who has power (and who does not) shapes what transpires in organizations, the flow of resources, and interpersonal dynamics. There are many tactics that people can use to gain power and to influence those in power. Individuals can also influence others through political behaviors. In this chapter, you used many different skills that are important to your employability while learning about power and politics. You learned self- and career management skills while reading about how to influence others toward a sustainable vision through Old Mutual's example, evaluating whether politics should be avoided altogether, determining how much IM to engage in during a job interview, and debating whether to emphasize the strategies to get ahead (versus lobbying for systemic change). In the next section, you will further apply these skills (along with leadership and critical thinking skills) to influencing the direction in an ad hoc team, evaluating the ethics of office romances, and navigating a hostile work environment.

EXPERIENTIAL EXERCISE The Turnaround Task Force

Randomly assign students to groups of five to seven people. Your team (a technical assistance team [TAT]) is tasked with creating a plan to improve schools' academic performance within a particular school district. The TAT is part of an educational consulting firm (the Turnaround Task Force) that quickly forms ad hoc teams and deploys them to areas experiencing educational challenges, where the stakes are high.

This school district is a fast-growing, large district in the downtown of an up-and-coming metropolitan area. Although this city was once known as a very undesirable place to live, things are changing for the better. Many companies are "setting up shop" in the area, attracted by the low tax rate, logistical infrastructure, and proximity to other regions.

However, the schools in this district have struggled for years to raise standardized test scores and student attendance. Your TAT heard through the grapevine of teachers who work in this district that it is controlled by the "Sovereign Six." The name was apparently given by a history teacher at one of the schools, commenting on how they hold an unwieldy amount of power and do not seem to have any accountability.

The school district also has limited financial resources. Moreover, it is unclear whether the resources the district does have are being used appropriately. After interviewing several teachers, it becomes obvious that the message each year is clear: Assessments do not really matter—just do your best. The district has done the same things in the same way for decades, and the Sovereign Six seem committed to keeping things just the way they are. When your team asked for a paper trail in advance of what the district does to plan for and evaluate assessment performance, you could not get a straight answer. Furthermore, the documentation you were sent was vague and ambiguous.

You are meeting as a team for the first time. Your team has twenty minutes to create a plan. After completing the exercise, answer the following questions.

Questions

13-8. During the exercise, did a clear leader emerge?

13-9. *If a clear leader did emerge*, what were the characteristics of the leader? What actions did the leader take to influence the rest of the group? Does this person match your understanding of how a leader should behave? Why or why not? *If a clear leader did not emerge*, how did you act together to accomplish the task? Were there any power dynamics that came up as a result of the lack of leadership?

13-10. Were there any conflicts or differences in opinions that you encountered during the exercise? Explain. In the conflicts that did arise, were there any influence tactics or power bases referenced?

13-11. Do you agree that leaders can operate through more subtle means (e.g., influence), not just by "taking charge"? Can exercising power be subtle? Why or why not?

ETHICAL DILEMMA Sexual Harassment and Office Romances

In this chapter, we discussed sexual harassment and how uneven power dynamics can contribute to sexual harassment. Sexual harassment often occurs because one employee, such as a supervisor, can use their control of resources to reward or coerce another employee into sexual behaviors. For example, when a manager asks a subordinate to go on a date, the subordinate is more likely to say yes because the manager has control over resources in the organization. If the subordinate declines the request, the manager could retaliate and withhold privileges from the subordinate.

Many companies try to prevent sexual harassment by forbidding coworkers from dating. Some have slightly softer rules. They forbid employees from dating their direct supervisors or coworkers in the same department, presumably so employees cannot use their power to perpetrate sexual harassment. These less stringent policies do not account for informal power that may exist in organizations. An employee can be in a junior position and still be able to withhold access to resources. This employee can still have enough political skills to harm another employee's career.

On the other hand, it may be impractical to try to enforce a policy against office romances. Modern Americans spend one-third of their lives working, so an employee will likely meet a partner at the office. According to a 2020 survey by the Society for Human Resource Management, 27 percent of employees have dated a coworker. Many of these romances involved a power difference as well: 27 percent admitted that they had dated a supervisor.

Is it worth discouraging office romances? Another survey from CareerBuilder revealed that almost one-third of office relationships resulted in marriage. And what should you do if Cupid's arrow strikes you in the breakroom? National workplace expert Lynn Taylor has this advice, "Policy or no policy, love happens. So in the absence of written rules… there's one common barometer: your common sense."[223]

Questions

13-12. Do you think offices should include rules about office romances in their sexual harassment policies? Why or why not?

13-13. Is it ever okay for a supervisor to date a subordinate? What if someone becomes their romantic partner's supervisor after the relationship was already initiated?

13-14. Why might 36 percent of survey respondents say that they hid their romantic relationships from coworkers? How does this relate to what we learned about office gossip in the chapter on group behavior?

CASE INCIDENT Imperium Omni

Shonda works for a large private security firm, Imperium Omni, in the Chicago O'Hare International Airport. Before working in this position, Shonda worked for a few years with the U.S. Transportation Security Administration (TSA). Once offered the job, Shonda was excited about her new role as a guard in charge of screening vehicles and individuals on the runway. However, on Shonda's first day, she witnessed some incidents that were hard to overlook.

After one of the senior guards trained her on the basics, he put her in charge of screening people. "I'm just going to go manage the security booth for a while. I think you can handle this." However, when Shonda came to check in with the guard after her shift was over, she was shocked to see from the outside that he was on a sexually explicit website. Shonda was very conscientious and had read the employee handbook front to back, so she knew this was a clear violation of company policy.

Nonetheless, she did not want to stir up trouble on her first day, especially with a senior guard. She figured there must be some reason he was a senior employee. She thought, "It's probably just an isolated incident," and decided to try to forget it. Unfortunately, this was only the beginning. Her supervisor, Richard, started to make comments about her appearance, and she noticed he would do the same thing to other women at Imperium. At first, she thought maybe she was just overacting. After all, he was complimenting her. But then he began to find excuses to do things that made her uncomfortable. Several times while she was using the copier, he would approach her from behind and then push up against her. When she would give him a disapproving look, he would simply smile and say, "Oh, my bad." Then, there was the time he and a group of guards were standing around laughing at a photo that was supposed to be funny but was very explicit. They called her over and asked her what she thought of it. When she said, "You all are disgusting," they just burst out laughing. Shonda now dreaded coming to work every day. Despite this feeling, Shonda continued to focus on doing her job well. After two years of working tirelessly, although she was not noticed by Richard, a manager at the airport recommended her to be promoted to a supervisor.

Shonda finally felt a sense of relief. Now that she was a supervisor, things would be different. She was at the same level as Richard and above some of the other guards. She would not have to deal with their demeaning comments. It was not long after she became a supervisor that she would overhear the other supervisors making inappropriate comments about the female guards' appearance.

Shonda realized she had to do something, especially now that she was a supervisor. It was no longer just about her; other women were also impacted. Although she did not necessarily have proof, she figured there was strength in numbers. Shonda did what the employee handbook says: She filed a formal complaint. She kept waiting for the other supervisors to give her a hard time about it. But months went by, and no one followed up with her. It was as if she had never filed the complaint.

At this point, Shonda started to wonder what she was doing wrong. She decided to do some more research because she had no formal training or education in management, much less experience teaching or training anyone. After reading *The Essential HR Handbook*, she decided to rethink her strategy. She had been trying so hard to change Richard and the other supervisors' behavior, but with little success. Shonda realized she had been looking at it all wrong. She needed to change the culture from the beginning. When someone was needed to train the new guards, she jumped at the opportunity.

Shonda believed she could train the guards to focus on the critical work the guards were there to do. She could teach the female guards to speak up and report sexual harassment. Initially, Shonda felt like she was doing just that. During the training sessions for new guards, she saw that the guards were motivated to do the work, and they found the training valuable. For Shonda, the goal of the training was to make it clear that this was a sexual harassment–free environment, and there were specific rules about how employees should act in the workplace.

She also held refresher classes for the existing guards during which she reviewed the protocols for reporting issues of harassment. She would remind them that she was a support person—if they did not feel comfortable reporting incidents, she could do so on their behalf. One day when Shonda was teaching a refresher class, a guard shared that she overheard a few guards making inappropriate comments about another guard. Shonda immediately takes action by reporting the incidents and reminds the class, "You all should continue to share any incidents like this with me. That's what I'm here for, and you can trust that I will tell management so that there are consequences for this behavior." At the end of another training session, a woman guard privately shares with Shonda that she was sexually assaulted by a co-worker outside of work. With Shonda's encouragement, the woman decided to report the incident. Over the next few months, Shonda continues to report incidents of harassment to HR. With time, the sheer number of complaints became hard to ignore. This was evident when Richard and another supervisor were finally suspended. Although it had been a long and slow process, Shonda felt a sense of relief that individuals were being held accountable for their actions and she hoped that the work she was doing would help to reduce the number of harassment incidents at Imperium.

Questions

13-15. In what ways did Shonda leverage power and influence tactics to combat the toxic culture of workplace harassment at Imperium Omni? Were there any other tactics she could have used, and would they have been effective? Why or why not?

13-16. In this case, there was a sexual harassment policy in place, Shonda was persistent in reporting these incidents, and she was even promoted. What allowed workplace harassment to continue without consequence?

13-17. How do you think the company should handle these reports of workplace harassment? What strategy would be most effective in preventing future instances of harassment from happening?

14

Conflict and Negotiation



Source: Michael Kappeler/AP/Shutterstock

LEARNING OBJECTIVES

After studying this chapter, you should be able to:

14-1 Describe the three types of conflict and the three loci of conflict.

14-2 Outline the conflict process.

14-3 Contrast distributive and integrative bargaining.

14-4 Apply the five steps of the negotiation process.

14-5 Show how individual differences influence negotiations.

14-6 Describe the social factors that influence negotiations.

14-7 Assess the roles and functions of third-party negotiations.

Employability Skills Matrix (ESM)

	Myth or Science?	An Ethical Choice	Point/ Counterpoint	Toward a Better World	Experiential Exercise	Ethical Dilemma	Case Incident
Critical Thinking & Creativity	✓		✓	✓	✓	✓	✓
Communication	✓	✓		✓	✓	✓	✓
Collaboration	✓			✓	✓		
Self-Management	✓	✓			✓	✓	
Social Responsibility		✓	✓	✓		✓	✓
Leadership				✓	✓	✓	
Career Management		✓	✓			✓	✓

THE MERKEL MODEL

As Germany's first woman to hold the nation's highest elective office, Chancellor Angela Merkel has seen her fair share of conflict. When she stepped down in 2021, Merkel became Germany's second-longest-serving leader of the modern era. Merkel was trained as a quantum chemist and lived in Soviet-controlled East Germany, working at a state-run research center. It was not until the historic fall of the Berlin Wall in 1989 that Merkel decided to leave behind her scientific work and pursue a lifelong interest in politics.

Merkel's training as a scientist has led her to rely on rationality and systematic analysis of situations before making decisions, even in tense situations. Merkel has become the closest negotiating partner of Vladimir Putin, president of Russia, but has also not hesitated to impose sanctions on Russia. In 2007, during negotiations with leaders at Putin's residence, he allowed his dog to approach Merkel, despite knowing that Merkel had a fear of dogs after having been attacked. Putin appeared instead to be amused by the incident. Merkel remained calm, though, and used the moment as an opportunity to learn more about Putin's character. She understood it to be an attempt to make Russia appear powerful when, in fact, the country was in a vulnerable position with an unstable economy and political system.

Merkel's steady leadership has led to the popularization of the expression "*merkeln,*" which describes waiting for a strategic opportunity or carefully waiting to make a strategic move. Although not known for being a risk-taker, Merkel has developed a reputation as a skilled negotiator. While she

has often been in the role of the outsider, particularly as a woman in a male-dominated political culture, Merkel has used this to her advantage by thoroughly assessing her negotiation counterparts and determining their weaknesses to advance the interests of Germany. A longtime political associate of Merkel explained that she only speaks about 20 percent of the time and listens 80 percent of the time when engaged in negotiation. For example, in her role as minister of the environment, she was able to successfully negotiate the Berlin climate deal by consulting Indian diplomat Kamal Nath for advice. Merkel was then able to find common ground with the countries involved in the deal while reaching an agreement that also benefited German engineering firms specializing in green energy.

Merkel demonstrated that learning as much as possible about one's negotiation partner and taking an integrative bargaining approach can indeed be an essential part of a successful negotiation. Her deliberate and patient approach has allowed her to maintain relationships even with leaders with whom she disagrees. Her negotiation style has enabled her to continue advancing the German people's interests during difficult times, including an economic crisis and the COVID-19 pandemic.[1]

A Definition of Conflict

14-1 Describe the three types of conflict and the three loci of conflict.

Tesla, an American automotive and energy company, along with its founder and CEO, Elon Musk, has experienced conflict on several fronts. From issues with Musk's candid Twitter posts, lawsuits, and feuds with the Securities and Exchange Commission (SEC) to disagreements among Musk and musicians Azealia Banks and Claire Boucher (a.k.a. Grimes), Tesla, along with the board of directors and employees, has witnessed its fair share of conflict.[2]

What is interesting, however, is where Tesla has *not* experienced conflict: within the board of directors.[3] Many have accused the board of being "asleep at the wheel," not willing to cause conflict where some might be needed. This might be due to loyalty to Musk and lack of time and resources (most board members are part time) and because all the corporate information they receive that affects their decision making is filtered through Musk. This has even led some to suggest using artificial intelligence (AI) in corporate board decision making, which is not limited by lack of time and resources and is perhaps more impartial.[4] The case of Tesla illustrates that conflict can arise in a number of different organizational arenas and that even the *absence* of conflict altogether can be a signal that perhaps important issues are not being discussed or that controversial ideas are not being challenged.

There has been no shortage of definitions for the word *conflict*,[5] but common to most is the idea that conflict is a perception of differences of opposition. We define **conflict** broadly as a process that begins when one party perceives that another party has negatively affected or is about to negatively affect something the first party cares about. People experience a wide range of conflicts in organizations over an incompatibility of goals, differences in interpretations of facts, disagreements over behavioral expectations, and the like. There is no consensus over the role of conflict in groups and organizations.

conflict A process that begins when one party perceives that another party has negatively affected, or is about to negatively affect, something that the first party cares about.

(Dys)functional Conflict

In the past, researchers tended to argue about whether conflict was uniformly good or bad. Such simplistic views eventually gave way to approaches recognizing that not all conflicts are the same and that different types of conflict have different effects.[6] Contemporary perspectives classify conflict based on its effects as *functional* or *dysfunctional*.[7]

Functional Conflict **Functional conflict** supports the goals of the group, improves its performance, and is thus a constructive form of conflict. For example, a debate among members of a corporate board about the most efficient way to improve production can be functional if unique points of view are discussed and compared openly. This form of conflict can be an antidote for groupthink (see the chapter on groups). It does not allow the group to passively rubber-stamp decisions that may be based on weak assumptions, inadequate consideration of relevant alternatives, or other weaknesses. Conflict challenges the status quo, furthers the creation of new ideas, promotes reassessment of group goals and activities, and increases the probability that the group will respond to change.

functional conflict Conflict that supports the goals of the group and improves its performance.

Dysfunctional Conflict Conflict that hinders group performance is destructive or **dysfunctional conflict**.[8] A highly personal struggle for control in a team that distracts from the task at hand is dysfunctional. Exhibit 14-1 provides an overview depicting the effect of levels of conflict. This form of conflict has clear detrimental effects on interpersonal dynamics, fosters negative emotions (e.g., anger, frustration, annoyance), and seeks to divide rather than unite toward a common goal.

dysfunctional conflict Conflict that hinders group performance.

Types of Conflict

One means of understanding conflict is to identify the *type* of disagreement, or what the conflict is about. Is it a disagreement about goals? Is it about people who just do not get along well with one another? Or is it about the best way to get things done? Although each conflict is unique, researchers have classified conflicts into three categories: task, relationship, or process.[9] **Relationship conflict** focuses on interpersonal relationships. **Task conflict** relates to the content and goals of the work. **Process conflict** is about how the work gets done.

relationship conflict Conflict based on interpersonal relationships.

task conflict Conflict over content and goals of the work.

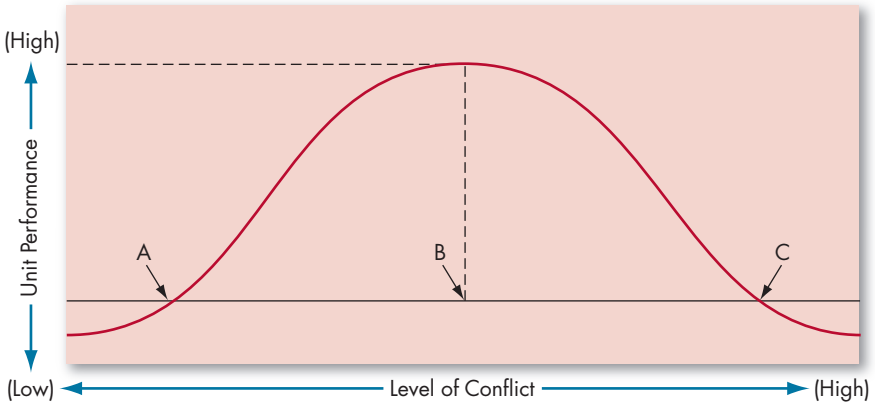
process conflict Conflict over how work gets done.

Relationship Conflict Studies demonstrate that relationship conflicts, at least in work settings, are almost always dysfunctional.[10] Why? The friction and interpersonal hostilities inherent in relationship conflicts increase interpersonal clashes and decrease mutual understanding. They tend to derail team processes by reducing the extent to which people are open to working with one another collaboratively toward solutions while increasing the extent to which they avoid and compete with one another.[11] As a result, relationship conflict strongly depletes trust, cohesion (see the chapter on work teams), satisfaction, job attitudes, and positive affect (see the chapter on emotions and mood) and can even lead to a reduction in organizational citizenship behaviors (OCBs) paired with an increase in deviant behavior.[12] However, relationship conflict itself is only weakly related to how well the team performs—so it appears its most nefarious affects are in how it affects people psychologically and how it reduces OCBs and increases deviance.[13] As such, of the three types, relationship conflict appears to be the most psychologically exhausting for workers.[14]

Task Conflict While scholars agree that relationship conflict is dysfunctional, there is considerably less agreement about whether task and process conflict is functional. Early research suggested that task conflict within groups correlated

Exhibit 14-1 Conflict and Unit Performance

We will discuss next the different *types* of conflict and the *loci* of conflict.



Situation	Level of Conflict	Type of Conflict	Unit's Internal Characteristics	Unit Performance Outcome
A	Low or none	Dysfunctional	Apathetic Stagnant Nonresponsive to change Lack of new ideas	Low
B	Optimal	Functional	Viable Self-critical Innovative	High
C	High	Dysfunctional	Disruptive Chaotic Uncooperative	Low

to higher group performance, but a review of ninety-five studies found that task conflict was essentially unrelated to group performance (although it did appear to be correlated to *lower* group performance in non-management positions, and *higher* group performance in decision-making teams).[15] Despite these findings, research suggests that task conflict slightly reduces the extent to which people collaborate and moderately increases the degree to which they compete with one another.[16] This, in turn, has a strong negative effect on their trust and job attitudes; and like relationship conflict, leads to a reduction in OCBs paired with an increase in deviant behavior.[17]

Process Conflict Process conflicts are often about delegation and roles. Conflicts over delegation often revolve around the perception of some members as shirking, and conflicts over roles can leave some group members feeling marginalized. Thus, process conflicts often become highly personalized and quickly devolve into relationship conflicts. It is also true, of course, that arguing about how to do something takes time away from actually doing it. Although relatively less research has been conducted on process conflict, research suggests that it

has a strong negative effect on team member trust and attitudes as well as a weak effect on team performance (like that of relationship conflict).[18]

Complicating Conflict It also appears to matter whether other types of conflict occur at the same time. If task and relationship conflict occur together, task conflict is more likely to have a negative effect, whereas if task conflict occurs by itself, it is more likely to have a positive effect.[19] How often does this occur in practice? Research from one entrepreneurial venture suggests that although the two are initially co-occurring, over time, they tend to stabilize after some time.[20] This suggests that one might expect relationship and task conflict to co-occur at the beginning of the relationship. Even the mere perception of relationship conflict during task conflict is enough to cause people to hold on to their initial preferences regarding the task conflict.[21]

Other scholars have argued that the perception of conflict is important. If task conflict is perceived as being very low, people are not really engaged or addressing the important issues; if task conflict is too high, infighting will quickly degenerate into relationship conflict. Moderate levels of task conflict may thus be optimal.[22] Furthermore, *who* perceives conflict also matters. Incompatibilities between work styles or dominating personalities with little space for compromise can lead to "too many cooks in the kitchen," resulting in relationship conflict and even abusive supervision.[23] Research suggests that conflict is more likely to have a positive effect on performance when a few members perceive strong task disagreement and most others on the team perceive weak task disagreement. This is because those of the minority opinion are much more likely to present their disagreements in a careful, cooperative, open manner.[24]

Loci of Conflict

Another way to understand conflict is to consider its *locus*, or where the conflict occurs among people. Here, there are three basic types. **Dyadic conflict** is conflict between two people. **Intragroup conflict** occurs *within* a group or team. **Intergroup conflict** is conflict *between* groups or teams.[25]

dyadic conflict Conflict that occurs between two people.

intragroup conflict Conflict that occurs within a group or team.

intergroup conflict Conflict between different groups or teams.

Nearly all the research on conflict focuses on intragroup conflict (within the group). However, it does not necessarily tell us all we need to know about the contingencies on conflict. For example, research has found that for intragroup task conflict to influence performance within the team, it is important that the team has a supportive climate in which mistakes are not penalized and every team member "[has] the other's back."[26] Similarly, the personal needs of group members may determine when task conflict has a positive impact on performance. For instance, task conflict can be beneficial for performance when members are high on the need for achievement.[27]

But is this concept applicable to the effects of intergroup conflict? For a group to adapt and improve, perhaps a certain amount of intragroup conflict (but not too much) is good for team performance, especially when the team members support one another. For instance, Josh Allen and Stefon Diggs (players for the NFL football team the Buffalo Bills) are known to have a great relationship on and off the field. At the same time, they are very competitive with one another in training, during practice, and even playing video games like *Call of Duty*.[28]

But would we care whether members from one NFL team were in conflict with members from another team? Probably not. In fact, if groups are competing with one another so that only one team can "win," interteam conflict seems almost inevitable, and rivalries often sprout between players. For instance, friendly rivalries between Josh Allen and other players like Sam Darnold and Patrick Mahomes have even led to proposed throwing competitions, or "throw-offs."[29]



Under the leadership of George Zimmer, the founder and CEO of Men's Warehouse (MW) and its advertising spokesperson, the retailer grew into a multimillion-dollar firm with 1,450 stores. After retiring as CEO, Zimmer served as executive chairman of MW's board until an intragroup conflict between him and other members resulted in his removal from the board.
Source: Patrick Fallon/Bloomberg/Getty Images

Still, it must be managed. Intense intergroup conflict can be quite straining on relationships between people and might well affect the way they interact. For instance, The Ohio State University and University of Michigan rivalry, although oftentimes friendly and well intentioned, has resulted in ostracism, verbal denigration, riots, and even threatened violence at times between fans.[30] In fact, many attribute the rivalry itself to several violent border conflicts between Ohio and Michigan in the 1800s.[31]

It may surprise you that a person's status and power (see the previous chapter on power and politics) become even more important during intergroup conflicts, but not in the way you might guess. One study that focused on intergroup conflict found an interplay between an individual's position within a group and the way that individual managed conflict between groups. Group members who were *relatively peripheral* in their own group networks were better at resolving conflicts between their group and another one.[32] Thus, being at the core of your work group does not necessarily make you the best person to manage conflict with other groups.

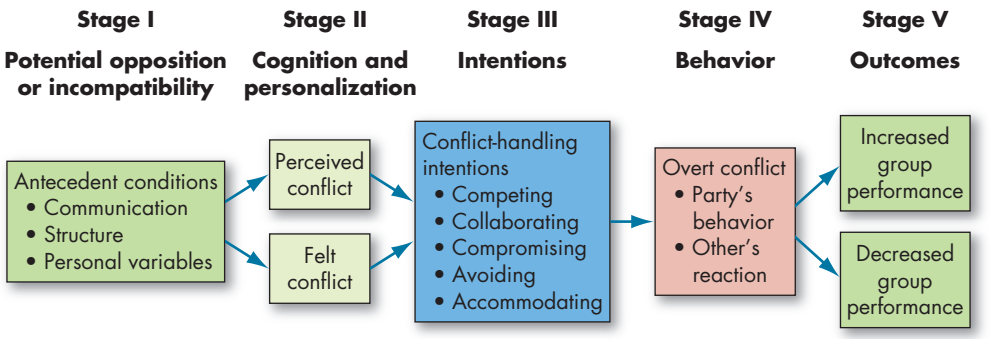
Altogether, functional and dysfunctional conflict requires not only that we identify the type of conflict; we also need to know where it occurs. It is possible that while the concepts of task, relationship, and process conflict are useful in understanding intragroup or even dyadic conflict, they are less useful in explaining the effects of intergroup conflict. But how do we navigate and manage the experience of conflict when it occurs? A better understanding of the conflict process, discussed next, will provide insight about potential controllable variables.

The Conflict Process

14-2 Outline the conflict process.

The conflict process has five stages: potential opposition or incompatibility, cognition and personalization, intentions, behavior, and outcomes (see Exhibit 14-2).[33]

Exhibit 14-2 The Conflict Process



Stage I: Potential Opposition or Incompatibility

The first stage of conflict is the appearance of conditions—causes or sources—that create opportunities for it to arise.[34] These conditions *need not* lead directly to conflict, but one of them is necessary if it is to surface. Apart from the obvious, which would be behaviors directly *intended* to provoke conflict,[35] we group the conditions into three general categories: communication, structure, and personal variables.

Communication Suri had worked in supply chain management at 3M for three years. Suri enjoyed the job largely because the manager, Aang, was a great supervisor. Then Aang was promoted and Rumra took the open position. Six months later, Suri now finds the job frustrating. "Aang and I were on the same wavelength. It's not that way with Rumra. Rumra tells me something, I do it, and then Rumra tells me I did it wrong. I think Rumra means one thing but says something else. It has been like this since day one. I do not think a day goes by without Rumra yelling at me or chastising me for something. You know, there are some people you just find it easy to communicate with. Well, Rumra is not one of those!"

Suri's comments illustrate that communication can be a source of conflict in dyadic and group interactions.[36] This experience represents the opposing forces that arise from miscommunication (see the earlier chapter on communication). Barriers to communication, including communication apprehension, crisis situations, and cross-cultural differences in norms, may be potential antecedent conditions to conflict. The potential for conflict has also been found to increase with too little or *too much* communication. Communication is functional up to a point, after which it is possible to overcommunicate, increasing the potential for conflict. Even the way communication is framed can have an effect: For example, framing task conflict as a debate increases receptivity to others' opinions.[37]

Structure Armani is a salesperson and Jaylen is the company credit manager at Furniture Mart, a large discount furniture retailer in St. Cloud, Minnesota. The two have known each other for years and have much in common: They live two blocks apart, and their oldest children attend the same middle school and are best friends. If Armani and Jaylen had different jobs, they might be friends, but at work they constantly disagree. Armani's job is to sell furniture and do it well.

Most of these sales are made on credit. Because Jaylen's job is to minimize credit losses, Jaylen regularly has to turn down the credit applications of Armani's customers. It is nothing personal between the two; the requirements of their jobs just bring them into conflict.

The conflicts between Armani and Jaylen are structural in nature. The term *structure* in this context includes variables such as the size of the group, degree of specialization in tasks assigned to group members, role clarity, member–goal compatibility, leadership styles, reward systems, and degree of dependence between groups or group members. The larger the group and the more specialized its activities, the greater the likelihood of intragroup conflict. Tenure and conflict are inversely related, meaning that the longer a person stays with an organization, the less likely intragroup conflict becomes.[38] Furthermore, shared leadership (see the chapter on leadership) can lead to conflict when power is scarce, causing people to "fight over their power turfs."[39] Therefore, the potential for intragroup conflict is greatest when group members are younger and when turnover is high. However, as far as intergroup conflict is concerned, it can self-perpetuate, actually imbuing *meaning* and *identity* to the groups experiencing conflict.[40]

Personal Variables Charlie and Morgan both work at the Pepsi bottling plant in Winston-Salem, North Carolina. Although initially the two seemed to get along very well, the two were sitting in the break room watching the news one day in November. As it was an election year, a political ad came up for the Senate seat that was available. Morgan made a comment about how it was absolutely imperative that the Republicans must be booted from office and that it was "a long time coming." Charlie took major issue with this comment as a Republican, and a heated, incendiary argument followed. The difference in political affiliation can be sensed by the rest of the team, and their coordination and collaboration have been severely affected by this new knowledge.

Our last category of potential sources of conflict is personal variables, which include personality, emotions, and values. People high in the personality traits of disagreeableness, neuroticism, or self-monitoring (see the chapter on personality and individual differences) are prone to spar with other people more often—and to react poorly when conflicts occur.[41] On the other hand, the politically skilled are less likely to initiate conflict as they are better able to manage others' perceptions.[42]

Emotions can cause conflict even when they are not directed at others. For example, an employee who shows up to work irate from the hectic morning commute may carry that anger into the workday, which can result in a tension-filled meeting.[43] Employees not sharing or experiencing the same emotions can also engender conflict. For example, employees may experience more conflict when they are pessimistic about a task and their supervisors are more optimistic.[44] As depicted in the example concerning Charlie and Morgan, values can often conflict with one another and cause emotionally charged conflict.

Furthermore, differences in preferences and values can generate higher levels of conflict. When group members do not agree about their desired achievement levels, there is more of an opportunity for task conflict; when group members do not agree about their desired interpersonal closeness, there is more opportunity for relationship conflict; and when group members do not have similar desires for power, there is more opportunity for conflict over status.[45] People differ with regard to their beliefs about conflict and which strategies of managing conflict are the best or worst; these beliefs shape the types of conflict they perceive as well as how they react.[46]

Stage II: Cognition and Personalization

If the conditions cited in Stage I negatively affect something one party cares about, then the potential for opposition or incompatibility becomes actualized in the second stage.

As we noted in our introduction to the chapter, conflict is a perception. However, just because a disagreement is a **perceived conflict** does not mean it is personalized. Instead, it can become **felt conflict**, where individuals become emotionally involved, potentially experiencing anxiety, tension, frustration, or hostility.

perceived conflict Awareness by one or more parties of the existence of or conditions that create opportunities for conflict.

Stage II is important because it is where conflict issues tend to be defined, where the parties decide what the conflict is about.[47] For example, the employee who was irate from the traffic jam may cause others around the office to perceive that something is up—but this conflict is not "felt" until a sour interaction with this employee (e.g., "It is not fair the supervisor took the long commute out on me with extra work!"). Moreover, emotions play a major role in shaping perceptions.[48] Negative emotions lead us to oversimplify issues, lose trust, and put negative interpretations on the other party's behavior.[49] When you perceive conflict, sometimes you may turn to a confidant within your group to vent or talk about what you are feeling. Paradoxically, if this person is responsive and reaffirming, your confidant may validate your perspective, which might undermine the resolution of conflict as a result.[50] In contrast, positive feelings increase our tendency to see potential relationships among elements of a problem, take a broader view of the situation, and develop innovative solutions.[51]

felt conflict Emotional involvement in a conflict that creates anxiety, tenseness, frustration, or hostility.

Negative emotions are natural and perhaps inevitable—before conflict escalates, taking time to reflect and reappraise how you are feeling may help you approach the conflict more constructively (but don't ruminate!).[52] Ultimately, a state of mindfulness (see the chapter on health and stress) might be a good emotional state to aspire toward, given it facilitates constructive conflict management.[53]

Stage III: Intentions

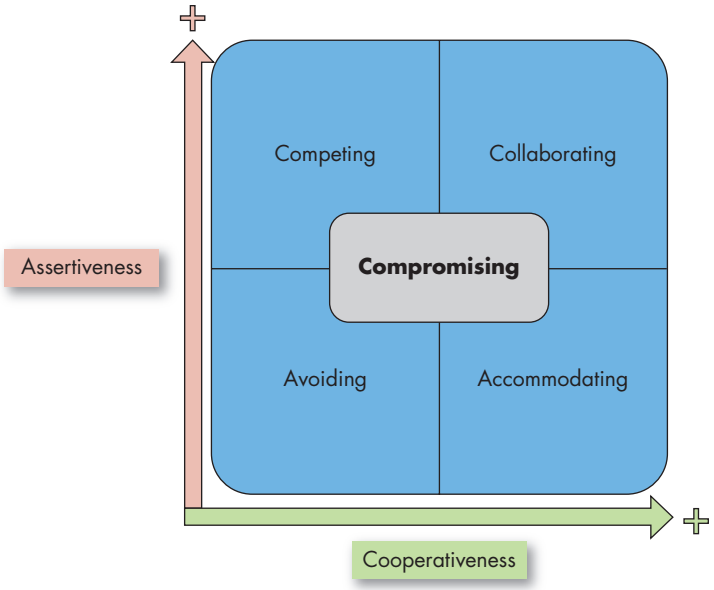
Intentions intervene between people's perceptions and emotions, and their overt behavior. They are decisions to act in a particular way.[54] Although we may decide to act in a certain way, our intentions do not always line up with what we actually do. Furthermore, intentions are not always fixed. During a conflict, intentions might change if a party is able to see the other's point of view or to respond emotionally to the other's behavior.

We can think of conflict-handling intentions as falling along two dimensions (as depicted in Exhibit 14-3).[55] These two dimensions—*assertiveness* (the degree to which one party attempts to satisfy their own concerns) and *cooperativeness* (the degree to which one party attempts to satisfy the other party's concerns)—can help us identify five conflict-handling intentions (also known as the Thomas Kilmann conflict modes): *competing* (assertive and uncooperative), *collaborating* (assertive and cooperative), *avoiding* (unassertive and uncooperative), *accommodating* (unassertive and cooperative), and *compromising* (midrange on both assertiveness and cooperativeness).[56]

Competing When one person seeks to satisfy their own interests regardless of the impact on the other parties in the conflict, that person is **competing**.[57] We are more apt to compete when resources are scarce, when we have competition-prone personalities, when we are close to satisfying our own interests (e.g., the "finish line is near"), or when the culture or climate supports competition.[58]

competing A desire to satisfy one's interests, regardless of the impact on the other party to the conflict.

Exhibit 14-3 Conflict-Handling Intentions



Source: Based on R. H. Kilmann, *Celebrating 40 Years With the TKI Assessment: A Summary of My Favorite Insights* (Sunnyvale, CA: CPP, 2018).

collaborating A situation in which the parties involved in a conflict all desire to fully satisfy the concerns of all parties.

Collaborating When parties in conflict each desire to fully satisfy the concerns of all parties, there is cooperation and a search for a mutually beneficial outcome. In **collaborating**, parties intend to solve a problem by clarifying differences rather than by accommodating various points of view.[59] If you attempt to find a win–win solution that allows both parties' goals to be completely achieved, that is collaborating. Collaboration is more likely if the party is seen as competent, rational, and open to collaborating.[60]

avoiding The desire to withdraw from or suppress a conflict.

Avoiding A person may recognize that a conflict exists and want to withdraw from or suppress it. Examples of **avoiding** include trying to ignore a conflict and keeping away from others with whom you disagree. If you are already overloaded as it is, but your supervisor keeps trying to involve you in more projects and assign you more tasks at work, you may avoid initiating conversations with them. Typically, avoidance takes two emotion-driven forms: withdrawal and exit (e.g., leaving a conversation with another person; usually driven by annoyance) and silence (e.g., not starting a conversation with another person; usually driven by anxiety).[61]

accommodating The willingness of one party in a conflict to place the opponent's interests above their own.

Accommodating A party who seeks to appease the other party may be willing to place the other's interests above their own, sacrificing to maintain the relationship. We refer to this intention as **accommodating**. Supporting someone else's opinion despite your reservations about it, for example, is accommodating.

compromising A situation in which each party to a conflict is willing to give up something to resolve the conflict.

Compromising In **compromising**, there is no winner or loser. Rather, there is a willingness to rationalize the object of the conflict and accept a solution with incomplete satisfaction of both parties' concerns. The distinguishing characteristic of compromising therefore is that each party intends to give up something.

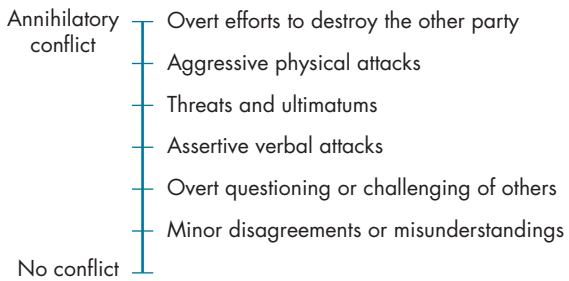
A review that examined the effects of the intentions across multiple studies found that accommodating and collaborating were both associated with superior group performance, whereas avoiding and competing strategies were associated with significantly worse group performance.[62] These effects were nearly as large as the effects of relationship conflict. Collaboration may be especially effective for tasks that require innovation, but it can lead to mistrust and conflict when groups are splintered into smaller groups of two or three based on task.[63] Individuals who have been assigned power tend to have a more difficult time using collaborative strategies.[64] This further demonstrates that it is not just the existence of conflict or even the type of conflict that creates problems but rather the ways people respond to conflict and manage the process once conflicts arise.

Stage IV: Behavior

When most people think of conflict, they tend to focus on Stage IV because this is where conflicts become visible. The behavior stage includes statements, actions, and reactions made by conflicting parties, usually as overt attempts to implement their own intentions. As a result of miscalculations or unskilled enactments, overt behaviors sometimes deviate from original intentions.[65] Intentions that are brought into a conflict are likely to be translated into behaviors. *Competing* brings out active attempts to contend with team members and more individual effort to achieve ends without working together. *Collaborating* creates investigation of multiple solutions with other members of the team and trying to find a solution that satisfies all parties as much as possible. *Avoidance* is seen in behavior as refusals to discuss issues and reductions in effort toward group goals. People who *accommodate* put their relationships ahead of the issues in the conflict, deferring to others' opinions and sometimes acting as a subgroup with them. When people *compromise*, they both expect to and do sacrifice parts of their interests, hoping that if everyone does the same, an agreement will emerge.

Stage IV is a dynamic process of interaction. For example, you make a demand on me, I respond by arguing with you, you shout at me, I yell back, and so on. Exhibit 14-4 provides a way of visualizing conflict behavior. Each behavioral stage in a conflict is built upon a foundation. At the lowest point are perceptions, misunderstandings, and differences of opinions. These may grow to subtle, indirect, and highly controlled forms of tension, such as a student challenging a point the instructor has made. Conflict can intensify until

Exhibit 14-4 Conflict-Intensity Continuum



Sources: Based on S. P. Robbins, *Managing Organizational Conflict: A Nontraditional Approach* (Upper Saddle River, NJ: Prentice Hall, 1974): 93–97; and F. Glasi, "The Process of Conflict Escalation and the Roles of Third Parties," in G. B. J. Bomers and R. Peterson (eds.), *Conflict Management and Industrial Relations* (Boston: Kluwer-Nijhoff, 1982): 119–40.

it becomes highly destructive. Strikes, riots, and wars clearly fall in this upper range. Conflicts that reach the upper ranges of the continuum are almost always dysfunctional. Functional conflicts are typically confined to the lower levels.

Stage V: Outcomes

The action–reaction interplay between conflicting parties creates consequences. As our model demonstrates (see Exhibit 14-1), these outcomes may be functional if the conflict improves the group's performance, or dysfunctional if it hinders performance. Realistically, however, many researchers suggest that although workplace conflict can be beneficial, it is usually under special circumstances, and most of the time the dysfunctional outcomes outweigh the functional outcomes in severity.[66] This suggests that managers will likely spend most of their time reducing dysfunctional conflict rather than stimulating functional conflict.

Functional Outcomes How might conflict act as a force to increase group performance? It is hard to visualize a situation in which agitated aggression could be functional. But it is possible to see how low or moderate levels of conflict could improve group effectiveness and creativity. Conflict is constructive when it improves the quality of decisions, stimulates creativity and innovation, encourages interest and curiosity among group members, provides the medium for problems to be aired and tensions released, and fosters self-evaluation and change. Indeed, over time, the right amount of task conflict (not relational conflict) can cause teams to improve their relations, the quality of social interaction, and meaningful communication.[67] Mild conflicts also may generate energizing emotions, so



IBM encourages employees to engage in functional conflict that results in innovations, such as the Watson supercomputer designed to learn through the same process human brains use. For innovation to flourish, IBM relies on the creative tension from employees' different ideas and skills and provides a work environment that promotes risk taking and outside-the-box thinking.
Source: Jon Simon/Feature Photo Service/Newscom

members of groups become more active, energized, and engaged in their work.[68] However, groups that are extremely polarized do not manage their underlying disagreements effectively and tend to accept suboptimal solutions, or they avoid making decisions altogether rather than work out the conflict.[69] As mentioned earlier in this chapter, conflict severity plays a large role.

Dysfunctional Outcomes The destructive consequences of conflict on the performance of a group or an organization are generally well known: A substantial body of research documents how dysfunctional conflicts can reduce group effectiveness.[70] Among the undesirable consequences are poor communication, reductions in group cohesiveness, and subordination of group goals to the primacy of infighting among members. All forms of conflict—even the functional varieties—appear to reduce group member satisfaction and trust.[71] At the extreme, conflict can bring group functioning to a halt and threaten the group's survival.

Managing Conflict

If a conflict is dysfunctional, what can the parties do to deescalate it? Or, conversely, what options exist if conflict is too low to be functional and needs to be increased? In these situations, people can use resolution and stimulation techniques to achieve the desired level of conflict, a process known as **conflict management**.[72] At a broader level, executives try to manage conflict proactively by developing conflict management systems of policies and procedures, increase lower-level management's involvement in conflict management, socialize dysfunctional conflict out of the organization's culture, and improvise where needed to adapt to conflict management needs.[73] In anticipating and managing conflict, organizations can target three specific domains: *strategy* (e.g., designing conflict management activities with an understanding of their effect on the organization system, garnering managerial support for and application of conflict management strategies), *function* (e.g., encouraging the systemic adoption of conflict management practices, understanding employees' needs, job design to reduce conflict), and *worker* (e.g., improving employee perceptions of conflict, fostering ties and cohesion between people, adaptively addressing conflict as it emerges).[74] For example, if the conflict is expected to be perpetual and ongoing, a strategic conflict management strategy might not target resolving the conflict completely, but rather how people can adaptively address the conflict over time.[75] At a narrower level, leaders manage conflict in three primary ways: *instigation* (i.e., intentionally creating conflict when needed), *engagement* (i.e., escalating conflict, involving others, or strategically observing), and *managing* (i.e., handling or resolving conflict).[76]

conflict management The use of resolution and stimulation techniques to achieve the desired level of conflict.

Even with the number of ways in which conflict can be managed, there are some practical guidelines for managers to implement conflict management more effectively. First, one of the keys to minimizing counterproductive conflicts is recognizing when there really is a disagreement. Perhaps the most successful conflict management recognizes different views and attempts to resolve them by encouraging open, frank discussion, listening and understanding opposing views, and then integrating them constructively.[77] Another approach is to have opposing groups pick parts of the solution that are most important to them and then focus on how each side can get its top needs satisfied. Neither side may get exactly what it wants, but each side will achieve the most important parts of its agenda.[78] Third, groups that resolve conflicts successfully discuss differences of opinion openly and are prepared to manage conflict when it arises.[79] The most disruptive conflicts are those that are never addressed directly. An open discussion makes it much easier to develop a shared perception of the problems at hand; it also allows groups to work toward a mutually acceptable solution. Fourth, managers need to emphasize

shared interests in resolving conflicts so groups that disagree with one another do not become too entrenched in their points of view and start to take the conflicts personally. Groups with cooperative conflict styles and a strong underlying identification with the overall group goals are more effective than groups with a competitive style.[80]

However, conditions are not always ideal, and the findings from research on conflict management showed marked differences in effectiveness across situations.[81] First, strategies appropriate for resolving one form of conflict may backfire and cause more conflict in another area.[82] For example, adopting a shared identity, resolving relationship quality, may unintentionally backfire by causing blurred distinctions between people's roles, stimulating task conflict. Second, strategies appropriate for managing one form of conflict may spill over into another domain.[83] For example, clearly outlining differences in what people do in the presence of task conflict can spill over to stimulate relational conflict. The fluid, abstract nature of conflict has led many researchers to analyze conflict management through a strategic systems view, viewing conflict as a chain of events wrought with various thoughts, emotions, and motivations. Taking such a view can enable managers to approach conflict from a more flexible, adaptive perspective.[84]

Cross-Cultural Conflict Management Differences across countries in conflict resolution strategies may be based on differences in cultural values (see the chapter on diversity, equity, and inclusion in organizations). Collectivist cultures see people as deeply embedded in connective social networks, whereas individualist cultures see them as autonomous and independent. As a result, collectivists are more likely to seek to preserve relationships and promote the good of the group as a whole. They avoid the direct expression of conflict, preferring indirect methods for resolving differences of opinion. Collectivists may also be more interested in demonstrations of concern and working through third parties to resolve disputes, whereas individualists are more likely to confront differences of opinion directly and openly. For example, compared to collectivist negotiators, their more individualist counterparts are more likely to see offers as unfair and reject them. Another study revealed that, whereas individualist managers were more likely to use competing tactics in the face of conflicts, compromising and avoiding were the most preferred methods of conflict management by collectivists.[85] Interview data suggest, however, that top management teams in collectivist high-technology firms prefer collaboration even more than compromising and avoiding.[86]

Cross-cultural negotiations can lead to trust issues.[87] One study of Indian and U.S. negotiators found that respondents reported having less trust in their cross-culture negotiation counterparts. The lower level of trust was associated with less discovery of common interests between parties, which occurred because cross-culture negotiators were less willing to disclose and solicit information.[88] Another study found that both U.S. and Chinese negotiators tended to have an ingroup bias, which led them to favor negotiating partners from their own cultures. For Chinese negotiators, this was particularly true when accountability requirements were high.[89]

Having considered conflict—its nature, causes, and consequences—we now turn to negotiation, which often resolves conflict.

Negotiation

14-3 Contrast distributive and integrative bargaining.

Negotiation permeates the interactions of almost everyone in groups and organizations. There is the obvious: Labor bargains with management. There is the not-so-obvious: Managers negotiate with employees, peers, and bosses; salespeople negotiate with customers; purchasing agents negotiate with suppliers. And there is the subtle: An employee agrees to cover for a colleague for a few minutes in exchange for a future favor. In today's loosely structured organizations, in which members work with colleagues in self-managed teams over whom they have no direct authority and with whom they may not even share a common supervisor, negotiation skills are critical.

We can define **negotiation** as a process that occurs when two or more parties communicate and confer with one another to come to a mutual agreement on the exchange of goods or services.[90] Although we commonly think of the outcomes of negotiation in one-shot transactional terms, like negotiating over one's salary before accepting a job offer, every negotiation in organizations also affects the relationship between negotiators and the way negotiators feel about themselves.[91] Depending on how much the parties are going to interact with one another, sometimes maintaining the social relationship and behaving ethically will be just as important as achieving an immediate outcome of bargaining. (Note that we use the terms *negotiation* and *bargaining* interchangeably.)

negotiation A process in which two or more parties communicate and confer with one another to come to a mutual agreement on the exchange of goods or services.

Bargaining Strategies

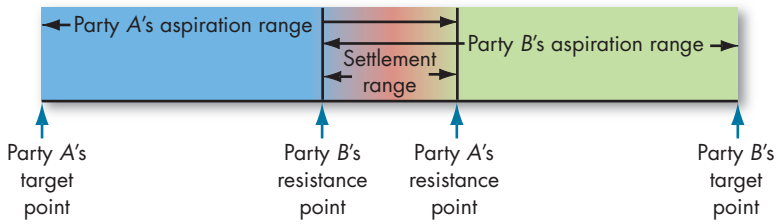
There are two general approaches to negotiation—*distributive bargaining* and *integrative bargaining*.[92] As Exhibit 14-5 shows, they differ in their goals and motivation, focus, interests, information sharing, and duration of relationship. Let us define each and illustrate the differences.

Distributive Bargaining Your team was not aware of a change in policy until it was already happening.[93] This policy meant that your team would receive 20 percent

Exhibit 14-5 Distributive Versus Integrative Bargaining

Bargaining Characteristic	Distributive Bargaining	Integrative Bargaining
Goal	Get as much of the pie as possible	Expand the pie so that both parties are satisfied
Motivation	Win–lose	Win–win
Focus	Positions ("I can't go beyond this point on this issue.")	Interests ("Can you explain why this issue is so important to you?")
Interests	Opposed	Congruent
Information sharing	Low (Sharing information will only allow other party to take advantage.)	High (Sharing information will allow each party to find ways to satisfy interests of each party.)
Duration of relationship	Short term	Long term

Exhibit 14-6 The Bargaining Zone



less resources next fiscal year. There is nothing you can do to stop the policy from being implemented, so you negotiate with the executive team regarding these provisions. Both parties believe that any gain is made at the other's expense, and when you try to negotiate halving this reduction in resources, the executives counter with an offer of 15 percent. The negotiating strategy you are engaging in is called **distributive bargaining**. Its identifying feature is that it operates under zero-sum conditions (see the chapter on power and politics)—that is, any gain I make is at your expense, and vice versa. The essence of distributive bargaining is negotiating over who gets what share of a fixed pie. By **fixed pie**, we mean a set amount of goods or services to be divvied up. When the pie is fixed, or the parties believe it is, they tend to engage in distributive bargaining.

distributive bargaining Negotiation that seeks to divide up a fixed amount of resources; a win–lose situation.

fixed pie The belief that there is only a set amount of goods or services to be divvied up between the parties.

The essence of distributive bargaining is depicted in Exhibit 14-6. Parties *A* and *B* represent two negotiators. Each has a *target point* that defines what they would like to achieve. Each also has a *resistance point*, which marks the lowest acceptable outcome—the point beyond which the party would break off negotiations rather than accept a less favorable settlement. The area between these two points makes up each party's *aspiration range*. As long as there is some overlap between *A*'s and *B*'s aspiration ranges, there exists a settlement range in which each one's aspirations can be met.

First Offer Anchoring When you are engaged in distributive bargaining, you may want to consider making the first offer. Making the first offer can put you at an advantage because of the anchoring bias, mentioned in the chapter on perception and decision making. People tend to fixate on initial information. Once that anchoring point has been set, they fail to adequately adjust it based on subsequent information. A savvy negotiator sets an anchor with the initial offer, and scores of negotiation studies show that such anchors greatly favor the person who sets them.[94] Moreover, these initial offer anchors are more effective the more precise they are because it changes the other party's perception of the negotiable range.[95] For instance, if you make a first offer for a service contract of $50,000, the purchasing party would be more likely to consider a range of, say, $40,000 to $60,000. However, if you are more precise and ask for $51,000, they are much more likely to consider a range of $50,000 to $52,000.

If you have a negotiation partner who is motivated to maximize their own return, a disadvantage of making the first offer is that you are conveying information about your priorities that the individual can use against you.[96] Furthermore, framing matters: If you frame the first proposal as a *request* (i.e., I request your B for my A) instead of an *offer* (i.e., I offer my A for your B), it can be detrimental to your negotiation success by highlighting a "loss" rather than a "gain" for the negotiation partner.[97] Another disadvantage to precision is that

if you make a precise offer before negotiations were even entered by both parties, the other party may be less likely to negotiate with you (because they may perceive you as inflexible).[98]

Distributive Bargaining Strategy In distributive bargaining, should you engage in *hardline* strategies in which you minimize your own concessions and make extreme offers, or should you engage in *softline* strategies, where you elicit concessions from the other party through your own concessions? One review suggests that it depends on the outcome you want: If it is important to preserve the relationship, softline strategies might be better.[99] If you want a higher economic return, than hardline strategies might be better. When is each strategy most effective? The hardline approach tends to be most effective if you are physically interacting with the other negotiator, when the other party is male, when both are motivated to maximize individual outcomes, and when they know what they can and cannot bargain (although people's perception of the bargaining zone itself is often distorted).[100] The softline approach is more effective only when you are able to adequately give concessions to the other party. Furthermore, some research suggests that *phantom anchors* (e.g., "I was going to ask for $10,000, but since you are making that concession, I will offer you $8,000 instead) can be an effective softline strategy that communicates your concession (even if the concession is overstated).[101]

Another soft tactic that builds upon the first offer effect mentioned earlier is the use of *multiple equivalent simultaneous offers* (MESOs). MESOs involve presenting multiple, equivalent first offers to the negotiating partner to choose from. This may lead the negotiation partner to perceive the offeror as flexible and sincerely trying to reach an agreement as well as increase the likelihood of the negotiation partner finding an option they like right away.[102] Moreover, when one of these alternative attractive offers is no longer available, the negotiator becomes more assertive and engaged in the negotiation process (having experienced loss) and is therefore positioned to obtain better outcomes, although they might be less satisfied with the process.[103]

Distributive Bargaining in Career Management So what does what we know about distributive negotiation mean for your career? Say that you have a job offer, and your prospective employer asks you what sort of starting salary you want. Now is the chance to direct the conversation and make your case—you have an opportunity to set the anchor, meaning you should ask for the highest salary you think the employer could reasonably offer. Asking for a million dollars is only going to make most of us look ridiculous, which is why we suggest being on the high end of what you think is *reasonable*. Too often, we err on the side of caution, afraid of scaring off the employer and thus settling for far too little. It *is* possible to scare off an employer, and it is true employers do not like candidates to be *too* assertive in salary negotiations.[104] What happens much more often is that we ask for less than we could have obtained. So, when moving into a salary negotiation, be sure to go in with the knowledge of industry salary rates and trends, build your case *prior* to the discussion if possible, and do not make it all about you—make it about the value you are providing to the company.[105]

Integrative Bargaining During her first pregnancy, one woman who worked full time for the federal government knew that she wanted to reduce her hours so she could spend more time with her child.[106] She did her research on the policies and procedures for part-time work to see how she might be able to make it happen. She went to her supervisor and discussed possibilities for a part-time work arrangement and was able to successfully negotiate for this arrangement. This



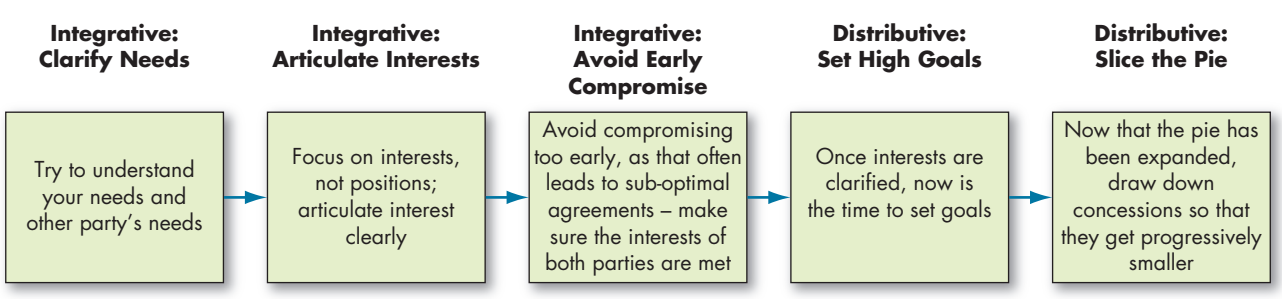
Officials of General Motors and United Auto Workers participate in the ceremonial handshake that opens new contract negotiations. They are committed to integrative bargaining and work toward negotiating win–win settlements that boost GM's competitiveness. From left are GM CEO Mary Barra, UAW president Dennis Williams, GM VP Cathy Clegg, and UAW VP Cindy Estrada.
Source: Paul Sancya/AP Images

integrative bargaining Negotiation that seeks one or more settlements that can create a win–win solution.

employee's attitude shows the promise of **integrative bargaining**. In contrast to distributive bargaining, integrative bargaining assumes that one or more of the possible settlements can create a win–win solution rather than a zero-sum situation. Of course, all parties must be engaged for integrative bargaining to work. This appears to be more of a possibility in negotiations between multiple (rather than two) negotiators because two people are more likely to see things in terms of binary, win–lose trade-offs.[107] Moreover, technique also appears to be important in integrative bargaining. Research shows that silent pauses in between offers and counteroffers communicates to others that you are considering what they are proposing, deliberately thinking about what they offer, and working with them to create value for all parties.[108]

Exhibit 14-7 illustrates how the two bargaining strategies can be utilized within the same negotiation episode. Early on in the episode, integrative strategies can be used, while later in the episode, distributive strategies can be used. Continuing with the previous example, the employee could first clarify her needs and articulate her interests to the supervisor and the supervisor would do the same, all without trying to come to a compromise right away. If a compromise is reached too early, it is more likely that one or more of the parties would settle for

Exhibit 14-7 Integration of Two Bargaining Strategies Within a Negotiation Episode



less than they could have obtained if they had been forced to consider the other party's interests, trade off issues, and be creative.[109] For example, the employee could have prematurely agreed to a half-day off a week. However, if both parties discussed what they wanted (e.g., the employer only wanted the employee to be working during a core time during the week and would be fine with flexibility outside that core time, as long as she worked the full hours), she could have been able to secure a much more attractive, flexible schedule. Similarly, it is important not to walk away too soon or cave into the negotiation partner's ultimatum—persisting through the process can pay off in better negotiation outcomes.[110] Once all of the needs and interests are established for both parties, the supervisor could then switch to a distributive strategy, setting goals aligned with the company's needs and interests while attempting to maximize the extent to which both parties' goals are met.

Choosing Bargaining Methods Integrative bargaining is preferable to distributive bargaining because the former builds long-term relationships.[111] Integrative bargaining bonds negotiators and allows them to leave the bargaining table feeling they have achieved a victory. Distributive bargaining, however, can result in one party feeling like they lost the negotiation. It tends to build animosity and deepen divisions when people must work together on an ongoing basis. Research shows that over repeated bargaining episodes, a losing party who feels positively about the negotiation outcome is much more likely to bargain cooperatively in subsequent negotiations.

Why, then, do we not see more integrative bargaining in organizations? The answer lies in the conditions necessary for it to succeed. Evidence from a study of nearly 200,000 people found that the financially vulnerable are more likely to construe the negotiation in zero-sum terms, curtailing their ability to come to integrative solutions.[112] Furthermore, negotiating parties who are open with information and candid about concerns, are sensitive to the other's needs and trust, and maintain flexibility tend to foster integrative bargaining. Although more traditional organizations may not foster these conditions, organizations with psychologically safe, open environments with positive cultures and climates and negotiating partners with integrative mindsets may perhaps do so.

The Negotiation Process

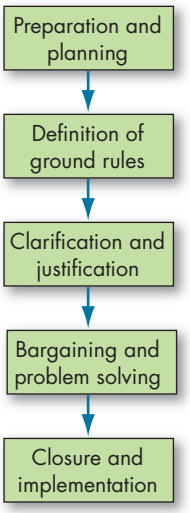
14-4 Apply the five steps of the negotiation process.

Exhibit 14-8 provides a simplified model of the negotiation process. It views negotiation as composed of five steps: (1) preparation and planning, (2) definition of ground rules, (3) clarification and justification, (4) bargaining and problem solving, and (5) closure and implementation.[113]

Preparation and Planning

This may be the most important part of the process. Before you start negotiating, do your homework. What is the history leading up to this negotiation? Who is involved, and what are their perceptions of the situation? Then consider your goals, in writing, with a range of outcomes from "most helpful" to "minimally acceptable." If you are a supply manager at Apple, for instance, and your goal is to get a significant cost reduction from your telecom components supplier (e.g., Qualcomm), make sure this goal stays paramount in discussions and does not get overshadowed by other issues. Next, assess what you think are the other party's goals. What intangible or hidden interests may be important to them? On what might they be willing to settle? Think carefully about what the other side might be willing to give up. People who underestimate their opponent's willingness to give on key issues before the negotiation even starts end up with lower outcomes.[114]

Exhibit 14-8 The Negotiation Process



When you can anticipate your negotiation partner's position, you are better equipped to counter arguments with facts and figures that support your position.

Once you have gathered your information, develop a strategy. You should determine your and the other side's best alternative to a negotiated agreement (**BATNA**). Your BATNA determines the lowest value acceptable to you for a negotiated agreement. Any offer you receive that is higher than your BATNA is better than an impasse. Conversely, you should not expect success in your negotiation effort unless you are able to make the other side an offer it finds more attractive than its BATNA.

BATNA The best alternative to a negotiated agreement; the least a party in a negotiation should accept.

In nearly all cases, the party with superior alternatives will do better in a negotiation, so experts advise negotiators to solidify their BATNA prior to any interaction.[115] There is an interesting exception to this general rule—negotiators with absolutely no alternative to a negotiated agreement sometimes "go for broke" because they do not even consider what would happen if the negotiation falls through.[116] Even though they are a safeguard against an inferior agreement, they are not a way to reach the optimal agreement—some suggest that although it is good to have this information ahead of time, you should focus on your mutual dependence (not alternatives) and positively frame the way you think about the negotiation (e.g., a learning experience with hidden potential, not a "frightening minefield").[117] Furthermore, just as phantom anchors are possible, so are *phantom BATNAs*. Setting a BATNA before a negotiation does not guarantee that the BATNA is probable or even possible. Those who hold a phantom BATNA may find themselves in the undesirable position of having to accept or reject a final offer from a negotiation partner when their chosen BATNA was not possible to begin with.[118]

Definition of Ground Rules

Once you have done your planning and developed a strategy, you are ready to define with the other party the ground rules and procedures of the negotiation itself. Who will do the negotiating? Where will it take place? What time constraints, if any, will apply? To what issues will negotiation be limited? Will you follow a specific procedure if an impasse is reached? During this phase, the parties will exchange their initial proposals or demands.

Clarification and Justification

When you have exchanged initial positions, you and the other party will explain, amplify, clarify, bolster, and justify your original demands. This step need not be confrontational. Rather, it is an opportunity for educating each other on the issues, why they are important, and how you arrived at your initial demands. Provide the other party with any documentation that supports your position. It might be useful to think back to what you learned in the previous chapter (power and politics) on influence, as framing can be important here.

Bargaining and Problem Solving

The essence of the negotiation process is the actual give-and-take in trying to hash out an agreement. This is where both parties need to make concessions. Relationships change as a result of negotiation, so take that into consideration. If you could "win" a negotiation but push the other side into resentment or animosity, it might be wiser to pursue a more compromising style.[119] As an example, of how the tone of a relationship in negotiations matters, people who feel good about the *process* of a job offer negotiation are more satisfied with their jobs and less likely to turn over a year later regardless of their actual *outcomes* from these negotiations.[120]

Closure and Implementation

The final step in the negotiation process is formalizing your agreement and developing procedures necessary for implementing and monitoring it.[121] For major negotiations—from labor–management negotiations to bargaining over service terms—this requires hammering out the specifics in a formal contract. For other cases, closure of the negotiation process is nothing more formal than a handshake or verbal confirmation.

Myth or Science?

Good Negotiators Rely on Intuition

Intuition often fails us in negotiation due to the unconscious biases we hold. In fact, negotiators may unintentionally engage in behavior that contradicts their values and ethical standards. The ethical implications of a decision are often apparent when one prepares for a negotiation. However, the implications of our decisions often fade away during the actual negotiation as we become more focused on pragmatic concerns. As a result, the cognitions and biases of negotiators can interfere with reaching agreements that reflect our interests.

Researchers have studied negotiators who engaged in empathizing (emotionally feeling what the other party was feeling) and those who engaged in perspective taking (view the world from the other person's perspective). The evidence indicated that individuals are better prepared to negotiate when they imagine how their counterpart is thinking, not how they feel.

While we are often capable of identifying the biases that influence others, we are often unaware of the biases that impact our behavior in negotiations. This disconnect can be explained by what psychologists have identified as two different lenses, the insider lens and the outsider lens, that individuals utilize during negotiations. A negotiator usually uses an insider lens to make decisions when they are deeply engaged in a specific situation and relying on intuitive thinking. On the other hand, a negotiator tends to adopt an outsider lens when they are removed from a situation and using rational thinking. Unfortunately, adopting the outsider lens is frequently not the default option during negotiations. However, utilizing the outsider lens rather than relying on intuition is vital in preventing negotiators from being influenced by biases that can ultimately lead negotiators to make irrational decisions.[122]

Individual Differences in Negotiation Effectiveness

14-5 Show how individual differences influence negotiations.

Are some people better negotiators than others? The answer is complex. Although recent research suggests that the situation or relationship tends to account more for negotiation outcomes, individual differences explain to a great degree how people perceive these outcomes.[123] On the one hand, some characteristics like status impact negotiating effectiveness. Take CEOs, for example. They are ultimately able to bargain with corporate boards to get larger shares of residuals, ultimately resulting in shareholders getting less of the cut. Moreover, they have more bargaining power in their negotiations with boards, prompting some researchers to ask whether "CEOs ever lose."[124] On the other hand, there are certain personality traits and psychological individual differences that can have an effect on negotiation effectiveness. For instance, if you tend to be low on emotional stability, you will probably view an unsuccessful negotiation as much more catastrophic than it actually was. Research suggests that extroverted, open, and honest negotiators tend to have better experiences than others.[125]

Four factors influence how effectively individuals negotiate: personality, mood/emotions, culture, and gender.

Personality Traits in Negotiations

Can you predict a negotiation partner's negotiating tactics if you know something about their personality? Because personality and negotiation outcomes are only weakly related, the answer is, at best, sort of.[126] Studies of marketing managers, lawyers, and construction supervisors suggest that when it comes to negotiation effectiveness, people who are ambitious and likeable tend to fare the best.[127]

But most research has focused on the Big Five trait of agreeableness, for obvious reasons—agreeable individuals are cooperative, compliant, kind, and conflict-averse. We might think such characteristics make agreeable individuals easy prey in negotiations, especially distributive ones. Although this prediction may come true if the agreeable negotiator is bargaining with a partner who is low on honesty or humility, overall, agreeableness is only weakly related to negotiation outcomes.[128] Furthermore, if the agreeable person seeks to preserve relationships at all costs and avoid straining them, then the person may be more likely to fare worse in a distributive negotiation.[129]

Interestingly, what seems to be more important is whether the negotiators have *similar* personalities (even if these traits are perceived by most people as *negative*!): When they do, they tend to reach an agreement faster, perceive less conflict, display more positive emotions, and have better impressions of the other negotiation partner.[130] Furthermore, when both parties seek to preserve relationships at all costs (as an element of agreeableness), they tend to fare much better in integrative negotiation.[131]

Self-efficacy (see the chapter on motivation theory) is one individual-difference variable that seems to relate consistently to negotiation outcomes.[132] This is an intuitive finding—it is not too surprising to hear that those who believe they will be more successful in negotiation situations tend to perform more effectively. It may be that individuals who are confident stake out stronger claims, are less likely to back down from their positions, and exhibit confidence that intimidates others. Conversely, those who are less confident and experience more threats to their self-worth during negotiation are less likely to be assertive and, therefore, experience suboptimal negotiation outcomes.[133] Although the exact mechanism is not yet clear, it does seem that negotiators may benefit from trying to get a boost in confidence before going to the bargaining table. One

way self-efficacy may operate is through autonomy and control. For instance, executives who believed that their and their organization's fate was changeable were more likely to engage in entrepreneurial, negotiating behaviors (which improved their financial performance in the long run).[134]

However, try not to be too confident: If you are negotiating with someone who has power over you (e.g., a supervisor who will be judging your performance in the future), it would be prudent to try to prevent negative relationship outcomes because you have more to lose.[135] Moreover, a sense of entitlement might lead you to demand excessive and unearned terms in a negotiation, which can lead to unethical negotiation behavior, a damaged reputation, and pernicious negotiation outcomes.[136]

Finally, some research suggests that emotional intelligence (EI) and emotion recognition ability is linked to gains in negotiation performance as well as to perceptions of being more cooperative and likeable.[137] Having an honest reputation also engenders trust and reduces the extent to which negotiation partners try to deceive you (but if you deceive them and break your reputation, watch out!).[138] In the next section, we describe how specific emotions and moods affect negotiations.

Moods and Emotions in Negotiations

Do moods and emotions influence negotiation? They do, but the way they work depends on the emotion as well as the context.[139] A negotiator who shows anger can induce concessions, for instance, because the other negotiator believes no further concessions from the angry party are possible. The context matters because negotiators are trying to find a way into the inner world of their negotiation partners. If they believe the emotion is incidentally being expressed as a part of the situation (and not a genuine expression), they may disregard it, or it may not be as effective.[140]

A number of factors influence whether anger is effective in negotiations. One factor that governs this outcome is power—you should show anger in negotiations only if you have at least as much power as your counterpart. If you have less, showing anger actually seems to provoke hardball reactions from the other side.[141] Another factor is how genuine your anger is—"faked" anger, or anger produced from surface acting, is not effective, but showing anger that is genuine (deep acting) is (see the chapter on emotion and mood).[142] However, maybe you should not hold it in either: Suppressing anger hurts performance because it is distracting to the negotiator, but only when the anger is integral to the negotiation.[143] Moreover, having a history of showing anger actually induces more concessions because the other party perceives the negotiator as "tough."[144] However, when negotiating with the same partner, negative emotions spill over from negotiation to negotiation, resulting in worse outcomes in subsequent negotiations.[145] If you use anger to "win" a negotiation, even though the tactic might be effective, you might *lose* in the long run as the other party is less likely to follow through with the deal and less likely to work with you again.[146] Finally, the effects of anger in negotiations vary across cultures. For instance, one study found that when East Asian participants showed anger, it induced more concessions than when the negotiator expressing anger was from the United States or Europe, perhaps because of the perception of East Asians as less quick to show anger.[147] Regardless of strictly positive or negative effects, your anger could lead the negotiating partner to try to seek more information about your preferences and priorities, leading to higher joint gains for both parties.[148]

Several other emotions also have effects on negotiation performance. For instance, anxiety appears to have an impact on negotiation. People who experience more anxiety about a negotiation may use deception more frequently in dealing with others.[149] Moreover, anxious negotiators expect lower outcomes, respond to offers more quickly, and exit the bargaining process sooner, leading

them to obtain worse outcomes.[150] Relatedly, the expression of sadness can elicit more concessions, but only when the other negotiator perceives the expresser as lower in power and anticipates future interactions with this person and when the relationship is collaborative.[151] This illustrates why it is important in both types of negotiation for parties to display sympathy for their counterparts, when needed, as this appeals to perceptions of rationality and fairness.[152] Paradoxically, however, the excessive expression of sympathy and empathy (although leading to better relational outcomes) may actually *hurt* value capture in negotiation because it moves the focus from the negotiation partners to one person's situation.[153]

Even emotional unpredictability affects negotiation outcomes; negotiators who express positive and negative emotions in an unpredictable way extract more concessions because this behavior makes the other party feel less in control.[154] As one negotiator put it, "Out of the blue, you may have to react to something you have been working on in one way, and then something entirely new is introduced, and you have to veer off and refocus."[155] However, emotional ambivalence tends to be related to more integrative agreements and concession making, as the ambivalent person is perceived as submissive.[156]

Culture and Race in Negotiations

Do people negotiate differently as a function of their culture? Yes, they appear to. In general, it appears people generally negotiate more effectively within cultures than between them.

It appears that for successful cross-cultural negotiations, it is especially important that the negotiators be high on the personality trait of openness (see the chapter on personality and individual differences). This suggests a good strategy is to choose cross-cultural negotiators who are high on openness and to avoid factors such as time pressure that tend to inhibit learning about the other party. Second, because emotions are culturally sensitive, negotiators especially need to be aware of the emotional dynamics in cross-cultural negotiation. For example, individuals from East Asian cultures feel that using anger in negotiations is not a desirable or legitimate tactic, so they may refuse to cooperate when their negotiation partners become upset.[157]

Some research on negotiations in the United States and Egypt suggests that the same language that leads to integrative agreements in Western cultures can backfire in others.[158] For example, in the United States, language that



People generally negotiate more effectively within cultures than between them. Politeness and positivity characterize the typical conflict-avoidant negotiations in Japan, such as with labor union leader Hidekazu Kitagawa (right), shown here presenting wage and benefits demands to Ikuo Mori, former president of Fuji Heavy Industries, which makes Subaru vehicles.
Source: Kyodo/Newscom

emphasizes cognitive, rational, and logical gains and losses tends to promote integrative bargaining. However, this language in other cultures, such as Egypt, can fail. Language that emphasizes honor, moral integrity, and protecting one's image and strength is preferable. Furthermore, some idiosyncratic rituals that differ across cultures can improve the success of integrative bargaining—for example, in Western cultures, a handshake promotes integrative deal-making because it acts as a signal of cooperative intent.[159]

Although not much research has examined the role of race in negotiations, a recent study has found that Black job seekers in the United States are (1) expected to negotiate less than White job seekers, (2) penalized in negotiations when they do try to negotiate, and (3) penalized more heavily when the negotiator is more racially biased.[160]

Gender in Negotiations

With regard to gender in negotiations, one stereotype is that women are more cooperative and pleasant in negotiations than men and, as a result, obtain worse outcomes. However, decades of research tend to suggest that the influence of gender in negotiations is highly context dependent, despite very slight differences in favor of men.[161] For example, women may be more effective negotiators in collectivist cultures with high harmony and low assertiveness norms.[162]

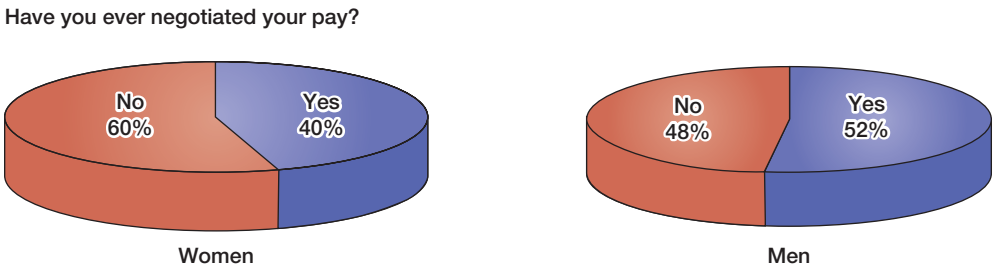
The influence of gender on both negotiation behavior and negotiation outcomes has been examined. Compared to men, women tend to behave in a slightly less assertive, less self-interested, more cooperative and concessional manner.[163] However, these differences are reduced when there are restrictions on communication. The research also suggests that women can actually be *more* competitive than men when the other negotiator engages in a "tit-for-tat" strategy.[164] Furthermore, men actually behave more unethically in negotiations than women, behaving more opportunistically and morally disengaging from the negotiation.[165]

However, when it comes to *initiating* negotiations, women are less likely to initiate than men, especially when the situation was ambiguous and when gender role reinforcing information is present in the situational context.[166] For instance, as demonstrated in the OB Poll, women are less likely than men to engage in salary negotiations following a job offer.

Although earlier research concluded that there was a slight benefit for men in negotiation outcomes,[167] an updated meta-analysis has found no significant difference in men and women.[168] Although men achieved better outcomes, on average, these differences were reduced when controlling for negotiation experience and knowledge of the zone of bargaining, when negotiating on behalf

OB POLL

Gender Differences in Salary Negotiations



Source: Based on M. Leonhardt, "60% of Women Say They've Never Negotiated Their Salary—and Many Quit Their Job Instead," CNBC, January 31, 2020, https://www.cnbc.com/2020/01/31/women-more-likely-to-change-jobs-to-get-pay-increase.html

of others, and when gendered role norms were not activated in the context.[169] Moreover, one analysis of data from thousands of women and men negotiators found that the gender gap only existed when women had a strong outside alternative (e.g., they were more likely to leave the negotiation and get the better option elsewhere than stay and "win" the negotiation).[170]

Aspiring Toward Gender Equity in Negotiations Despite virtually no differences in negotiation performance and outcomes, women still feel more hesitant to initiate negotiations in organizations. What can be done to change this troublesome state of affairs? First, organizational culture plays a role. If an organization, even unwittingly, reinforces gender-stereotypic behaviors (men negotiating competitively, women negotiating cooperatively), it will negatively affect negotiations when anyone goes against stereotype. Men and women need to know that it is acceptable for each to show a full range of negotiating behaviors. Thus, a female negotiator who behaves competitively and a male negotiator who behaves cooperatively need to know that they are not violating expectations. Making sure negotiations are designed to focus on well-defined and work-related terms also has promise for reducing gender differences by minimizing the ambiguous space for stereotypes to operate. This focus on structure and work relevance also obviously helps focus negotiations on factors that improve the organization's performance.

Second, other researchers argue that what can best benefit women is to break down gender stereotypes for the individuals who hold them.[171] In the long term, gender identity awareness and the elimination of gender role stereotypes will help women advance in negotiation contexts. However, although ignoring gender differences (i.e., "gender blindness") is often looked down upon in general, some research suggests that it can be beneficial in certain work contexts. Negotiation is one of them—research shows that gender-blindness in these contexts empowers women to take negotiating actions and builds confidence, taking the attention away from gender and putting it toward the actual resources to be exchanged.[172]

Negotiating in a Social Context

14-6 Describe the social factors that influence negotiations.

We have been mostly discussing negotiations that occur among parties that meet privately and perhaps only on one occasion. In organizations, however, many negotiations are open-ended and public. When you are trying to figure out who in a work group should do a tedious task, negotiating with your supervisor to get a chance to travel internationally, or asking for more money for a project; there is a social component to the negotiation. You are probably negotiating with someone you already know and will work with again, and the negotiation and its outcome are likely to be topics people will talk about. To really understand negotiations in practice, then, we must consider the social factors of reputation and relationships.

Reputation

Your reputation is the way other people think and talk about you. When it comes to negotiation, having a reputation for being trustworthy matters. In short, trust in a negotiation process opens the door to many forms of integrative negotiation strategies that benefit both parties.[173] The most effective way to build trust is to behave in an honest way across repeated interactions.[174] Then others will feel more comfortable making open-ended offers with many different outcomes. This helps to achieve win–win outcomes because both parties can work to achieve what is most important to themselves while still benefitting the other party.

Sometimes we either trust or distrust people based on what we hear from others through the grapevine (see the chapter on power and politics) about a person's characteristics. What type of characteristics help a person develop

Toward a Better World

ALDI: Downstream Environmental and Social Implications of Supplier Negotiations

ALDI is an international supermarket chain headquartered in Germany. For over forty years, it has sought to provide high-quality groceries at everyday low prices. How does ALDI fulfill this mission and serve 40 million customers each month? It does so through volume purchasing, operating through exclusive brand products (e.g., 90 percent of all products offered are exclusive to ALDI), overstocked nonfood products that revolve in and out of circulation, and avoiding nonessential services (e.g., banking, pharmacies) that other grocers may provide.

Given its business model, ALDI strives to forge transparent, fair, and sustainable relationships with its suppliers, who play a crucial role in enabling it to fulfill its mission. In fact, worldwide, ALDI has made many great strides toward corporate social responsibility (CSR) in its supply chain. For instance, it is the fourth most progressive brand worldwide in its progress phasing out unsustainable palm oil from its chains. ALDI has been lauded by many for its efforts to carry more water-efficient fruit and vegetables. (About 70 percent of global freshwater usage stems from fruit and vegetable farming.) Moreover, it has set many ambitious goals, such as diverting 90 percent of its operational waste, 100 percent green packaging for all of its products, and reducing greenhouse gas emissions by 26 percent by 2025.

However, ALDI has recently come under fire for some of its fruit sourcing practices. Namely, the results of a recent pricing negotiation agreement have caused quite a stir that has reverberated through the supply chain. Year over year, suppliers and watchdogs have become concerned with the steadily decreasing ALDI contract prices for bananas. The 2021 price has fallen by about fifteen cents per pound from the price in 2020. Banana Link (a banana commodities trade union) and a group of Central and South American banana producers (from Ecuador, Colombia, Guatemala, Honduras, Panama, and Costa Rica) suggest that this is a signal to the market of going against its sustainable sourcing commitments.

These lower negotiated prices worry banana suppliers, who think this will result in a labor cost squeeze and labor conflict as well as market instability. Even worse, downstream effects may present themselves as the abandonment of rural communities, contributing to local poverty, undermining social cohesion, and hampering development in South American countries. Beyond its effect on producers, which many suggest amounts to an earnings reduction by as much as 50 percent for smaller banana growers, many worry about a price war and other retailers following suit. In many ways, ALDI's contract is "the most important for South American banana growers." It exercises "special market power given its price benchmarking capacity." The downstream effect of this pricing decision could reverberate through the market as other buyers follow suit.

On the other hand, ALDI has not disputed the pricing reduction and notes that it will not affect the price paid to farmers. It suggests that the lowered prices stem from differences in exchange rates and lowered transportation costs due to oil prices plummeting during COVID-19. However, the union and producers take issues with this statement and note that ALDI should not lower the price to producers without lowering the price to consumers. They see this as an action detrimental to banana farmers and suppliers, especially during a worldwide health crisis and Hurricane Eta, which hit several Central American countries hard. Moreover, many note that ALDI would make negotiation decisions like this public at one point—but now, they claim its practices are more opaque. As Alistair Smith of Banana Link noted, "Aldi is listening and not learning… Aldi needs to align their purchasing practices with their ethical aspirations. We would encourage their commercial decision-makers to become more open to discussion."

In a joint statement, Banana Link and the American banana producers state that "producing in a sustainable way entails costs which are assumed exclusively by the producer, while the rest of the value chain actors avoid any responsibility… Aldi [does] not assume their share of responsibility and maintain an opaque negotiating position that endangers the subsistence of the producers." The pricing issues in the banana market have led The Rainforest Alliance to take a stand. Leonie Haakshorst, the lead for banana and fruit at the Alliance, noted that "prices have gone down in the past ten years, while the [sustainability] requirements have gone up, as well as costs." As such, the 2020 Agriculture Standard has a new concept for "shared responsibility," in which shared financial responsibility is advocated throughout the supply chain for producers, workers, and the purchasing companies.[175]

a trustworthy reputation? Individuals who have a reputation for integrity can also be more effective in negotiations. They are seen as more likely to keep their promises and present information accurately, so others are more willing to accept their promises as part of a bargain. This opens many options for the negotiator that would not be available to someone who is not seen as trustworthy. Finally, individuals who have more solid reputations are better liked and have more friends and allies—in other words, they have more social resources, which may give them more implicit power in negotiations.

Relationships

There is more to repeated negotiations than just reputation. The social, interpersonal component of relationships with repeated negotiations means that individuals go beyond valuing what is simply good for themselves and instead start to think about what is best for the other party and the relationship as a whole.[176] Repeated negotiations built on a foundation of trust also broaden the range of options because a favor or concession today can be offered in return for some repayment further down the road.[177] Repeated negotiations also facilitate integrative problem solving. This occurs partly because people begin to see their negotiation partners in a more personal way over time and come to share emotional bonds.[178] Repeated negotiations also make integrative approaches more workable because a sense of trust and reliability has been built up.[179] In sum, it is clear that an effective negotiator needs to think about more than just the outcomes of a single interaction. Negotiators need to think about the relationship they have (and will continue to have) with the negotiating partner once an agreement has been reached.

An Ethical Choice

Ethical Challenges in Negotiation

Would you ever lie in a negotiation? You may immediately say no, but imagine you have spent months looking for a job with little success. However, you recently received an offer for the position of director of marketing. During your discussion, the hiring manager asks if you have any other offers on the table. You do not actually have any other offers. Still, you find yourself saying that you have several other offers. When they ask for more details, you tell them that all the offers are significantly higher than the one the company put forth.

Although you did not intend to deceive your potential employer, negotiations can place us in high-pressure situations that present ethical challenges. Research demonstrates that the larger the reward, the more likely we are to lie, showing that our ethical standards may be more flexible than we would like to believe. When negotiating with groups, people are also more likely to lie than with just one person. The reason is that group interactions are perceived as less personal, which becomes a perception that individuals use to justify unethical behavior. Finally, research indicates that whether someone will use unethical negotiation techniques varies depending on the negotiating partner's nationality.

Here are some strategies you can employ to navigate some of these ethical challenges:

1. **Build relationships.** Negotiators are less likely to utilize unethical tactics when they know their counterpart well and trust them. They understand that their relationship will be in jeopardy if the other side discovers that they have engaged in unethical behavior.
2. **Negotiate in person.** Research has shown that direct face-to-face contact between negotiating parties decreases the use of ethically ambiguous tactics compared with negotiations conducted via e-mail or phone.
3. **Get to know the whole person.** Negotiators tend to rely on stereotypes when attempting to manage cultural differences in international negotiation. Instead, take the time to learn about the negotiating partner's culture and get to know them individually, including their skills and work experience.[180]

Third-Parties in Negotiations

14-7 Assess the roles and functions of third-party negotiations.

To this point, we have discussed bargaining in terms of direct negotiations. Occasionally, however, individuals or group representatives reach a stalemate and are unable to resolve their differences through direct negotiations. In such cases, they may turn to a third party to help them find a solution. There are three basic third-party roles: *mediator, arbitrator*, and *conciliator*.

A **mediator** is a neutral third party who facilitates a negotiated solution by using reasoning and persuasion, suggesting alternatives, and the like. Mediators are widely used in labor–management negotiations and in civil court disputes. Their overall effectiveness is fairly impressive. For example, the Equal Employment Opportunity Commission (EEOC) reported a settlement rate through mediation at 72.1 percent.[181] But the situation is the key to whether mediation will succeed; the conflicting parties must be motivated to bargain and resolve their conflict. In addition, conflict intensity cannot be too high; mediation is most effective under moderate levels of conflict. Finally, perceptions of the mediator are important; to be effective, the mediator must be perceived as neutral and noncoercive.

mediator A neutral third party who facilitates a negotiated solution by using reasoning, persuasion, and suggestions for alternatives.

An **arbitrator** is a third party with the authority to dictate an agreement. Arbitration can be voluntary (requested by the parties) or compulsory (forced on the parties by law or contract). The big plus of arbitration over mediation is that it always results in a settlement. Whether there is a downside depends on how heavy-handed the arbitrator appears. If one party is left feeling overwhelmingly defeated, that party is certain to be dissatisfied and the conflict may resurface later. Moreover, like mediators, arbitrators are supposed to be impartial and independent. Sometimes, conflicts of interest can arise, such as how Kenneth Robinson was appointed as arbitrator in multiple cases with several parties (in several different suits) concerning the Deepwater Horizon oil rig fire in the Gulf of Mexico.[182]

arbitrator A third party to a negotiation who has the authority to dictate an agreement.

A **conciliator** is a trusted third party who provides an informal communication link between the negotiator and the negotiation partner. In practice, conciliators typically act as more than mere communication conduits. They also engage in fact finding, interpret messages, and persuade disputants to develop agreements. Agreeable individuals with a concern for others tend to adopt the role of conciliator, and they tend to be respected and admired by their peers as a result.[183] Comparing conciliation to mediation in terms of effectiveness has proven difficult because the two overlap a great deal. However, sometimes the authority vested in arbitrators and mediators is needed. For example, twenty-seven employees who worked at the Estonian HKScani Rakvere meat company went on strike in late 2017 protesting low wages. Despite involving a conciliator, the dispute continues to be unsolved because neither party is willing to communicate with one another civilly. As the conciliator noted, "I am also disappointed with [the] results. If one party says that the salary needs to be raised by 50 percent and the other party says 0 percent, and neither side gives up, they will never reach an agreement."[184]

conciliator A trusted third party who provides an informal communication link between the negotiator and the negotiation partner.

Summary

Conflict is an inevitable part of organizational life. As long as people hold different opinions, value different things, see the future differently, or contest over control of valued resources, conflict will arise. However, negotiation is a tool people can use to stave off conflict or otherwise address its more nefarious effects and come to an agreement. In this chapter, we described how conflict can

be both functional and dysfunctional in organizations. Although we often think of it in dysfunctional terms, conflict can be a good thing when the organization is stagnating or when there is a desire to produce novel ideas and innovation from the tension. Moreover, there are many different types of conflict. It can occur within interpersonal relationships, over the nature of work, and over the way work gets done. It can also occur between people or groups or within groups. Understanding conflict of a process is also essential because it outlines where problems can arise, how parties can approach the conflict productively, and where workers and negotiators (such as mediators, arbitrators, and conciliators) can intervene effectively. Concerning negotiation, two general approaches revolve around whether the resources being negotiated over are fixed or variable. Just as there is an explicit conflict process, so too is there a negotiation process that is important to follow. Careful attention to all parts of the negotiation process (but particularly the preparation and planning phase) is critical to negotiation success. Moreover, certain factors are critical in influencing the success of negotiations, including negotiators' personality traits, emotions, culture, race, and gender identity. Overall, we must realize that conflict and negotiation are social phenomena. They have substantial implications for reputation and relationship management.

Implications for Managers

- Do not try to discourage conflict at all costs—sometimes it is beneficial, like when trying to brainstorm new ideas or approaches for a new project.
- Communication skills training, efficient organizational structures, skillful emotion regulation, and an openness to others' personalities and values are all key in averting unproductive conflict.
- When choosing conflict-handling intentions or conflict management strategies, competing and avoiding are rarely effective. Try to take a collaborative, compromising, or accommodating approach depending on your goals and the situation.
- Conflict management is a strategic enterprise. It involves perceiving conflict accurately through multiple lenses (e.g., awareness of cross-cultural perspectives), managing others, highlighting shared interests, open discussion, and, at times, instigating conflict.
- Integrative negotiation strategies often lead to desirable outcomes, but can be combined with distributed negotiation strategies to reach even better outcomes.
- When both parties have agreed to a negotiation, you will be at an advantage if you can anchor the negotiations by making a precise first offer.
- Although both hardline and softline negotiation strategies have their benefits, softline strategies are often better in the long run if the relationship needs to be preserved.
- Softline strategies can show your negotiation partner that you are flexible (e.g., giving multiple offers that are of equal value) and giving concessions (e.g., communicating phantom anchors; in other words, you were going to ask for more, but you are going to ask for less to preserve the relationship).
- Preparation and planning is the most crucial part of the negotiation process. Before going into the negotiation, it is often essential to establish your (and guess your negotiation partners') best alternative to a negotiated agreement (BATNA). This is the least you (or your partner) would

accept from the negotiation. This establishes how much you or your partner is willing to lose.

- Keep in mind that many personality traits and individual differences influence negotiation effectiveness. These have important implications for who to select as negotiators (e.g., personality), what to train for negotiation effectiveness (e.g., communication skills and emotion regulation), and what your organization can do from a diversity, equity, and inclusion (DEI) standpoint to foster equitable negotiations.
- Always keep in mind that negotiation is a social activity—it is critical to be aware of your actions' effect on your reputation and relationships with others.
- When negotiation is unsuccessful and when conflict persists, it may be of use to bring in a third party (e.g., a mediator, arbitrator, conciliator).

Nonunion Positions and the Gig Economy Are Bad for Workers

POINT

What do Uber, DoorDash, and Amazon Mechanical Turk all have in common? These platforms are fuel for short-term freelance work and reflect what economists have dubbed the gig economy. Fifty years ago, employers expected workers to stay with a company for thirty years. In exchange for their loyalty, employees were given more opportunities and a pension. Unlike the labor market of today, companies promoted talent from within. As this practice fell by the wayside, employers hired employees for shorter and shorter periods. Now, many new jobs are not long-term or even short-term positions: They are gigs. Employees work as independent contractors, using third-party platforms to connect to clients. Because these employees do not have a traditional employment contract, they have complete flexibility: They can work as much or as little as they want.

Unfortunately, many of these platforms have a dirty secret. Unlike regular employment, people employed primarily through gigs do not have the benefits of a traditional job. Because they are considered self-employed, they do not get paid for overtime, do not receive benefits, and have no collective bargaining power. There is also evidence that they are replacing rather than supplementing more stable employment. For example, Uber and Lyft drivers tripled in Silicon Valley from 2012 to 2014, while payrolled cab and limo jobs decreased by 31 percent in the same period.

Without the ability to collectively bargain, the labor market is akin to the Wild West frontier. That is why many freelancers on these platforms are trying to unionize. In New York and Seattle, labor unions are trying to allow gig employees to create collective bargaining units. Doing so will allow employees to demand health benefits and overtime. It will also ensure that these employees make a living hourly wage, rare for gig employees. Despite working sixty hours a week, many employees still do not make as much as traditional employees. However, many gig workers turn to the Freelancers Union for legal advice, access to insurance, and many other resources despite the inability to collectively bargain.

Yes, it is great for employers to sell younger generations on the flexibility of these positions; however in exchange for flexibility, they are also losing the power to negotiate for fair working conditions. Let us stop pretending that freelance work platforms like Uber are suitable for the economy and leave the gig economy trend at the curb.

COUNTERPOINT

While the gig economy has its drawbacks, these platforms exist for a reason. Employers and employees alike are fed up with traditional employment. Yes, some people who work through freelance apps use it as a primary source of income. But there are just as many, if not more, who just want a flexible second job to get a little extra cash. If these positions were like the services they are replacing (e.g., cab companies), then gig employees would have to agree to specific policies regarding sick days and work a set schedule.

Many are also skeptical of the idea that freelancers are replacing traditional employment. Yes, some city-level data shows that gig-based jobs increased while payroll jobs decreased. But more data suggest that contractor and payroll jobs have increased in most sectors that support freelance platforms. For example, while freelance platforms like Uber Eats increased over four years, payroll jobs in hospitality also increased. The same is true for the transportation industry over the same period. If anything, the reason these freelance platforms have been so successful is that these industries are growing. It is not that they are replacing traditional services—they are meeting the demand that traditional services cannot fulfill.

The benefits of having a collective bargaining agreement may also be exaggerated. Whenever a group tries to create a collective bargaining agreement, it causes conflict. One poll indicated that most employees (80 percent) believed leaders will not protect the group's interests as a whole. Instead, leaders usually use their power in numbers to protect their own self-interests in negotiations.

Collective bargaining does not just hurt businesses—it also hurts the public. For example, the International Civil Aviation Organization has been trying to put cameras in commercial airline cockpits. These cameras would allow authorities and employers to monitor pilots on the job. These videos can help piece together why plane crashes occur. Yet pilots have been using collective bargaining techniques to fight the initiative because it violates airline pilots' privacy. They also insist that it could be used to "lead investigators away from accurate conclusions" regarding employees' performance.

Yes, traditional employment allows employees to bargain for rights as a group. But this also leads to concessions and conflict that do not benefit employees or their employers.[185]

CHAPTER REVIEW

QUESTIONS FOR REVIEW

14-1 What are the three types of conflict and the three loci of conflict?

14-2 What are the steps in the conflict process?

14-3 What are the differences between distributive and integrative bargaining?

14-4 What are the five steps in the negotiation process?

14-5 How do individual differences influence negotiations?

14-6 What are the social factors that influence negotiations?

14-7 What are the roles and functions of third-party negotiations?

APPLICATION AND EMPLOYABILITY

As you learned in this chapter, conflict can be beneficial in certain contexts. However, as we portray it more often, it can also be a very destructive force. Thankfully, through conflict management and negotiation practices, you have learned how and when negotiation and conflict resolution strategies may be used to address its adverse effects. While exploring these topics, you used many skills that can help you be more employable. You developed your critical thinking, creativity, communication, and social responsibility competencies by evaluating whether good negotiators rely on their intuition, considering the downstream effects of corporate negotiation on the environment and sustainability, outlining the ethical challenges in negotiation, and debating the benefits of the gig economy for workers. In the next section, you will develop these skills further while also using your leadership skills to resolve a conflict between coworkers, assess how to handle conflict resulting from an open-floor-plan office design, and participate in a negotiation role play.

EXPERIENTIAL EXERCISE A Negotiation Role Play

You will consider two scenarios for this case: One is more distributive, the other more integrative. Form pairs, with one of you taking the role of the engineering director and the other taking the role of the marketing director. Read only your own side's specific information for the two negotiation processes. The overall situation is the same for both scenarios, but the priorities and outlook for the parties change depending on whether you are negotiating the "contested resources" scenario or the "combined future" scenario.

The Case

Cytrix develops integrated bicycle and running performance systems. Runners and bikers wear the Cytrix watch, which uses GPS signals to identify their location and the distance they have covered. This information can then be uploaded to the Cytrix Challenge website, where users record their performance over time. Social media tools also allow them to compare their performance relative to that of friends. The majority of users are either amateur student-athletes or committed adult hobbyists like marathon runners.

The organization needs to determine how to allocate a fixed pool of resources for future development between the marketing and engineering groups. Rather than making an executive decision about resource allocation, the top management team has asked the respective teams to allocate $30 million for planned future development and decide who will run different parts of the project.

Specific Information for the Marketing Group

Only the marketing manager should read this section.

The marketing group has been tracking the major sales areas and has concluded that Cytrix has saturated the market. New sources of customers, especially general consumers interested in health but are not committed athletes, will need to be considered for future growth. Research into sales of competitive products and areas where competitors are failing to meet consumer demands is needed.

The marketing group's primary goal is to allocate sufficient resources to finance the research. The group also wants to retain control over which new products will be developed. Marketing would prefer to see engineering act in a consulting role, determining how best to manufacture the devices that fit the needs identified above.

Specific Information for the Engineering Group

Only the engineering manager should read this section.

The engineering group has recently been tracking the development of new hardware to improve the accuracy of distance and speed estimates in remote areas. Several other companies are already experimenting with similar designs. Engineering believes it will be necessary to develop the technology further to realize this improvement fully, so it is both lightweight and inexpensive to produce. The engineering group's primary goal is to allocate sufficient resources to develop these new technologies. The engineers would prefer to see marketing act in a consulting role, determining how best to advertise and deliver the new devices.

Contested Resources Scenario

The marketing and engineering departments are locked in a power struggle. Your side (either marketing or engineering) should try to direct the most significant possible proportion of both money and authority toward your proposed program. You still need to think of a solution. The other side ultimately agrees to assist you in implementing the program. If you cannot reach an agreement for shared resources, the CEO will appoint new directors for both groups.

Combined Future Scenario

The marketing and engineering departments are eager to find a positive solution. Both sides should try to see that the company's future needs are met. You know that to achieve success, everyone needs to work together, so you would like to find a way to divide the money and resources that benefits both marketing and engineering. Plans can incorporate multiple techniques for sharing and collaborating with resources.

The Negotiation

At the start of the negotiation, the instructor randomly assigns half the groups to the contested resources scenario and the other half to the combined future scenario. Begin the process by outlining the goals and resources for your side of the negotiation. Then negotiate over the terms described in your scenario, attempting to advocate for a solution that matches your perspective.

Debriefing

Afterward, you will get together with the other students to discuss the processes used. Especially consider the differences in outcomes between the contested resources and combined future scenarios. Either scenario could arise in a natural work environment, so think about how different negotiation situations give rise to different strategies, tactics, and outcomes.

ETHICAL DILEMMA To Intervene or Not to Intervene?

About a year ago, Finley noticed an issue developing between two of the coworkers on his team. It was likely not apparent to everyone as they never yelled at one another or were overtly hostile. However, they began to avoid each other and would not sit near one another at meetings. Finley noticed that the tension between the two had begun to affect their team's work. Finley decided it was necessary to figure out the underlying reason that the two were not getting along. Finley decided to talk with one of them, as they were close friends. After listening to the friend describe the situation, Finley provides friendly support: Finley is available if they ever need advice or want to vent.

Despite Finley's best efforts, the issue persists. Finley worries that it may escalate and ultimately impact the team's success. Finley wonders about making their supervisor aware of the situation in hopes of finally resolving the conflict. However, Finley worries about the consequences of involving the supervisor and ultimately decides to try to act as a mediator, arranging a conversation with both coworkers. At the end of the meeting, the two coworkers only agree to continue avoiding one another as much as possible.

Questions

14-8. How would you have handled the conflict between your two coworkers? Should you have tried to resolve the conflict or stayed out of it altogether?

14-9. At what point, if any, would you escalate the situation and bring it to your supervisor's attention?

14-10. As a team member, do you believe you have a responsibility to act as a mediator to ensure the conflict does not impact the team's success?[186]

CASE INCIDENT Disorderly Conduct

The sound of Matt and Peter's arguing is familiar to everyone in the office by now. To make the best use of space and ensure a free flow of discussion and ideas, the founder of Markay Design decided to do something about the office layout. He decided to convert the one-floor office of the company to an open plan with no walls between workers. The goal of such a layout is to eliminate boundaries and enhance creativity. But for Matt and Peter, the new arrangement creates a growing sense of tension.

The argument boils down to the question of workspace order and organization. Peter prefers to keep his desk completely clean and clear, and he keeps a stack of cleaning wipes in a drawer to eliminate any dust or dirt. On the other hand, Matt likes to keep all his work visible on his desk, so sketches, plans, magazines, and photos are scattered everywhere, alongside boxes of crackers and coffee cups. Peter finds it hard to concentrate when he sees Matt's piles of materials everywhere. At the same time, Matt feels he can be more creative and free-flowing when he is not forced to clean and organize constantly. Many of Matt and Peter's coworkers wish they would just let the issue drop. Peter and Matt enjoyed a good working relationship in the past, with Peter's attention to detail and thorough planning serving to rein in some of Matt's wild inspirations. But of late, their collaborations have been derailed in disputes.

Everyone knows it is not productive to engage in conflicts over every minor irritant in the workplace. However, altogether avoiding conflict can be equally harmful. An emerging body of research has examined so-called conflict cultures in organizations. The findings suggest having a culture that actively avoids and suppresses conflicts is associated with lower levels of creativity. Cultures that push conflict underground but fail in reducing the underlying tensions can become passive-aggressive. These cultures become marked by underhanded behavior against other coworkers.

Ultimately, finding a way through the clutter dispute will probably be an ongoing process to find a balance between perspectives. Both Matt and Peter worry that their usually positive work relationship will be too contentious to bear if they cannot find a solution. That would be a real mess.

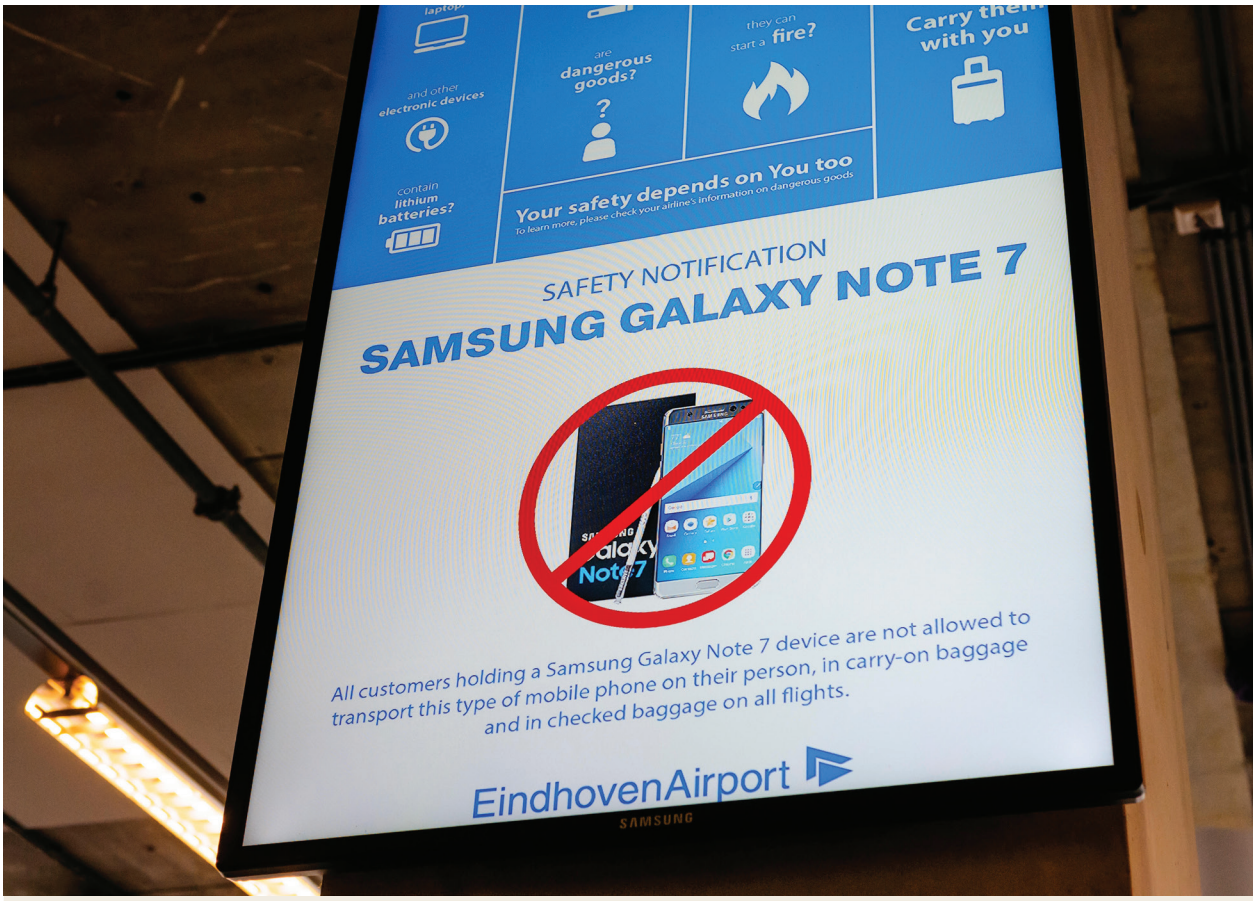
Questions

14-11. Describe some of the factors that led this situation to become an open conflict.

14-12. Do you think this is an issue worth generating conflict over? What are the potential costs and benefits of Matt and Peter having an open discussion of the issues?

14-13. How can Matt and Peter develop an active problem-solving discussion to resolve this conflict? What could effectively be changed, and what is probably going to remain a problem?[187]

15 Foundations of Organization Structure



Source: Stephen Barnes/Travel/Alamy Stock Photo

LEARNING OBJECTIVES

After studying this chapter, you should be able to:

15-1 Identify seven elements of an organization's structure.

15-2 Identify the characteristics of the simple structure, the bureaucracy, and the matrix structure.

15-3 Identify the characteristics of the virtual structure, the team structure, and the circular structure.

15-4 Describe the effects of downsizing on organizational structures and employees.

15-5 Contrast the reasons for using mechanistic versus organic structural models.

15-6 Analyze the behavioral implications of different organizational designs.

Employability Skills Matrix (ESM)

	Myth or Science?	An Ethical Choice	Point/ Counterpoint	Toward a Better World	Experiential Exercise	Ethical Dilemma	Case Incident
Critical Thinking & Creativity	✓	✓	✓		✓	✓	✓
Communication					✓		
Collaboration	✓	✓	✓	✓	✓		
Self-Management	✓						
Social Responsibility		✓		✓		✓	✓
Leadership	✓	✓	✓	✓	✓	✓	✓
Career Management							

SAMSUNG: TRANSFORMING A HIERARCHY

The Samsung Group is an international leader in electronics—in 2020, it commanded over 16 percent of the global smart phone market. The conglomerate had an even higher market share before, but now, alongside its major rival, Apple, it faces stiff competition collectively from smaller, cheaper brands. Yet its current position is still far ahead of the 3 percent market share it had in 2009. Samsung remains the largest multinational conglomerate corporation in South Korea and among the top 10 largest companies in the world.

However, this climb to the top has not been without turbulence. In 2016, Samsung announced a global recall of the Note 7 after several owners discovered their phones on fire. Replacement phones did not solve the problem, and production was halted. As if things couldn't get worse, the heir to the Samsung Group, Jay Y. Lee, was jailed for corruption in early 2017. There was a public outcry, and the firm's reputation was at stake.

Faced with a leadership vacuum, investors demanded a review of the corporate structure. Strategic, operational, financial, legal, tax, and accounting considerations had to be scrutinized to determine the optimal structure for the conglomerate. Clearly there were issues of quality (as in the Note 7 debacle) and transparency (as in the Lee bribery and embezzlement scandal). In spite of all this, Samsung's share price didn't just hold; it rose. While the decision was taken not to change the fundamental corporate structure, other structures underwent change internally.

Much attention was given to the Future Strategy Office, the centralized headquarters of Samsung. The Office was referred to as the Control Tower and played an important role in lobbying government on policy issues. The centralized headquarters also enabled Lee to maneuver as he did, and as a response to his conviction, and to increase scrutiny of decision making, the Future Strategy Office was dismantled.

This decision promised to provide more autonomy to the subsidiaries. On the face of it, these structural changes appeared to address concerns over abuse of power. However, considering the 59 subsidiaries and 500,000 employees in the Group, questions were raised about how organized the Group would be without its central authority in place, and the fact is that all group-wide projects and tasks were halted as a result of the decision to disband the Office. Concerns were raised that the lack of a central coordinating body could pose challenges to collaboration across the entities.

What structural adjustments lie ahead for Samsung? With the cutthroat level of hyper-competition in the electronics sector, the ability to innovate is vital. Can Samsung attract the innovative talent needed for its still very hierarchical structures?[1]

Even for a startup with only a few employees, choosing an organizational structure requires far more than simply deciding who is the supervisor and how many employees are needed to complete the work. The organization's structure determines what relationships form, the formality of those relationships, and many work outcomes. The structure may also change as organizations grow and shrink, as management trends dictate, and as the organization pivots to realize new visions and goals. Structural decisions are arguably the most fundamental ones that founders and executives must make toward sustaining organizational growth. In this chapter, we will explore how structure affects employee behavior and the organization as a whole.

What Is Organizational Structure?

15-1 Identify seven elements of an organization's structure.

Google is a company that "does organizational structure right."[2] Its structure supports the innovative culture, competitiveness, and growth of the company. Although it might not seem like it at first, structure is very important for different aspects of business:[3] For example, Dr. Timothy Giardino, the human resources (HR) director at Cantata Health and Meta Healthcare IT Solutions, suggests, "Structure follows strategy. . . structure controls behavior. . .[and] structure supports execution."[4] Structure can also stand in the way of organizations fulfilling their social mission. For example, systematic biases and structural barriers can prevent members from underrepresented groups from advancing in their careers.[5] Organizations have a responsibility to consider the need for organizational change and identify barriers that formally (and informally) limit their advancement.

An **organizational structure** defines how job tasks are formally divided, grouped, and coordinated.[6] Seven key elements should be considered when designing an organization's structure: work specialization, departmentalization, chain of command, span of control, centralization and decentralization, formalization, and boundary spanning.[7] Exhibit 15-1 presents each element as the answer to an important structural question, and the following sections describe each one.

organizational structure The way in which job tasks are formally divided, grouped, and coordinated.

Work Specialization

A great deal of work goes into that pint of ice cream you enjoy when you celebrate doing well on a test or quiz. Let us take a trip to the Ben & Jerry's factory in Waterbury, Vermont, to see how it is made.[8]

First, shortly after arriving at the factory, milk and cream are pumped from the truck into six thousand–gallon storage silos and kept at thirty-six degrees by "shipping and receiving coordinators." Next, the "mix master" worker mixes the milk, cream, liquid cane sugar, egg yolks, and natural stabilizers using a one thousand–gallon mega-blender. A "pasteurization and homogenization specialist" than heats the mix to kill harmful bacteria (e.g., pasteurization). The blend is forced through a very small opening at very high pressure (e.g., homogenization) to ensure that fat particles are finely emulsified and then cooled in a five thousand–gallon tank for four to eight hours.

After the wait, the "flavor vat" technicians mix in the flavorings, purees, and extracts in five hundred–gallon steel vats, after which the mixture is pumped into a freezing cylinder known as the barrel, where it chills to the consistency of soft-serve ice cream. Now here is where the magic happens—depending on the flavor of ice cream, the ice cream passes through the "chunk feeder" (if it is getting chocolate chunks or other ingredients), the "variegator" (if it is a "swirled" flavor), and then the automatic filler, where it is dispensed into the pint containers and frozen even further (to the point of hard ice cream).

At this point, "freezer workers" oversee the process of the ice cream pints' bundling and assembly into shrink wrap for shipment and into pallets that are stored in a twenty degree below zero warehouse. Of course, "quality assurance

Exhibit 15-1 Key Design Questions and Answers for Designing the Proper Organizational Structure

The Key Question	The Answer Is Provided by
1. To what degree are activities subdivided into separate jobs?	Work specialization
2. On what basis will jobs be grouped together?	Departmentalization
3. To whom do individuals and groups report?	Chain of command
4. How many individuals can a manager efficiently and effectively direct?	Span of control
5. Where does decision-making authority lie?	Centralization and decentralization
6. To what degree will there be rules and regulations to direct employees and managers?	Formalization
7. Do individuals from different areas need to regularly interact?	Boundary spanning

specialists" are involved in each step, making sure the ice cream is of top quality before arriving in your hands. By dividing the monumental task of manufacturing ice cream at a small plant in Vermont that is to be distributed far and wide, Ben & Jerry's is able to produce a million pints a day with the help of hundreds of workers performing specialized tasks.[9]

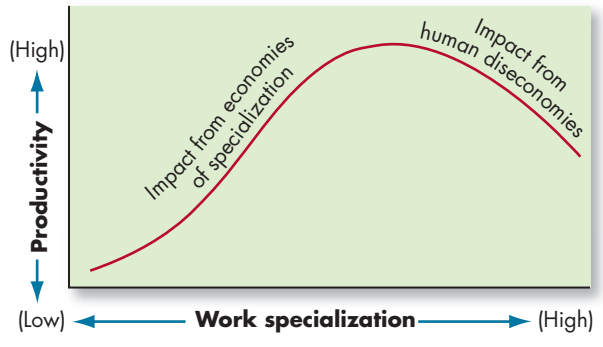
work specialization The degree to which tasks in an organization are subdivided into separate jobs.

Work specialization, or *division of labor*, describes the degree to which activities in the organization are divided into separate jobs and steps, each completed by a separate individual.[10] Individuals specialize in doing part of an activity rather than completing the entire process themselves. Overall, specialization is a means of making the most efficient use of employees' skills and even successfully improving them through repetition. Less time is spent changing tasks, putting away tools and equipment from a prior step, and getting ready for another. Amazon's Mechanical Turk program, TopCoder, and others like it have facilitated a new trend in *microspecialization* in which extremely small pieces of programming, data processing, or evaluation tasks are delegated to a global network of individuals by a program manager who then assembles the results.[11]

Work can be performed more efficiently if it is specialized, and the practice still has applications in many industries. For example, could you build a car by yourself? Not likely! Equally important, it is easier and less costly to find and train workers to do specific tasks, especially in highly sophisticated and complex operations. Work specialization increases efficiency and productivity by encouraging the creation of customized inventions and machinery. However, despite its advantages, specialization could be carried too far. Human diseconomies may begin to surface in the form of boredom, fatigue, stress, low productivity, inferior quality, increased absenteeism, and high turnover, which more than offset the economic advantages (see Exhibit 15-2).[12] Productivity could be increased by enlarging, rather than narrowing, the scope of job activities. Giving employees a variety of activities to do, allowing them to do a whole and complete job, and putting them into teams with interchangeable skills often achieved significantly higher output, with increased employee satisfaction.[13] Moreover, the success of specialization depends heavily on the stability of the work tasks and duties to be completed: If they are constantly changing, specialization may be less desirable.[14]

Most managers today recognize the economies that specialization provides in certain jobs and the problems when it is carried too far. High work specialization helps fast-food restaurants make and sell hamburgers and fries efficiently and aids medical specialists in most health maintenance organizations. Wherever job roles can be broken down into specific tasks or projects, specialization is

Exhibit 15-2 Economies and Diseconomies of Work Specialization



possible. Specialization may still confer advantages outside manufacturing, particularly where job sharing and part-time work are prevalent. This opens the way for employers to use online platforms to assign multiple workers to tasks in a broader functional role like marketing.[15] Thus, whereas specialization traditionally focuses on breaking manufacturing tasks into specific duties within the same plant, specialization can also judiciously break complex tasks into specific elements that can be performed anywhere by specialists.

Departmentalization

Once jobs have been divided through work specialization, they must be grouped so common tasks can be coordinated and complexity can be reduced. The basis by which jobs are grouped is called **departmentalization**.[16]

departmentalization The basis by which jobs in an organization are grouped together.

Functional Departmentalization One of the most popular ways to group activities is by the *functions* performed. A manufacturing manager might organize a plant into engineering, accounting, manufacturing, HR, and supply chain departments. A hospital might have departments for research, surgery, intensive care, accounting, and so forth. Functional departmentalization allows efficiencies to be gained from putting specialists that focus on similar areas together. Furthermore, functional departmentalization allows specialists to become experts more easily than if they worked in diversified units. However, coordination among these diverse units is a problem, and infighting in units and between units can lead to reduced motivation.

Product or Service Departmentalization We can also departmentalize jobs by the type of *product* or *service* the organization produces.[17] Procter & Gamble (P&G) places each major product sector (e.g., baby care, feminine care, beauty, family care, health care, grooming, fabric care, home care, and P&G Ventures) under an executive who has complete global responsibility for it. Products such as Tide, Pampers, Charmin, Tampax, Gillette, My Black is Beautiful, Crest, Prilosec, and Febreeze would each be the responsibility of a different sector.[18] The major advantage is increased accountability for performance because all activities related to a specific product or service are under the direction of a single manager.[19] But for this type of departmentalization to be effective, it is also important for the department or team to have a broader understanding of the organization outside their own product specialization (e.g., knowing what the other teams and departments work on over time).[20]

Geographical Departmentalization When a firm is departmentalized based on *geography*, each function (for example, sales) may be allocated to different regions or markets (e.g., a country may have northern, western, southern, and eastern regions).[21] This form is valuable when an organization's customers are scattered over a large geographic area and have similar needs within their locations. For this reason, Toyota changed its management structure into geographic regions "so that they may develop and deliver ever better products," said Toyota President Akio Toyoda.[22] When organizations departmentalize by region, these departments and co-located teams form their own identities and practices.[23] These regional teams affect the coordination and performance across locations as well as how information is acquired and shared throughout the organization.[24] Organizations with geographical departmentalization should pay special care toward inter-region communication and knowledge sharing, which can be made easier through virtual communications and knowledge management systems.

Process Departmentalization *Process departmentalization* involves structuring employee, product, or customer processes.[25] For example, information security firms may have (1) a policy management department that works with HR, legal, and project management functions to set information security policies; (2) a network security department that oversees network security, intrusion prevention, and event management; (3) an identity and access management department to oversee user credentialing, identification, and access; and (4) an operations department that oversees implementing changes and ensuring systems are up and running.[26] As a user of IT services, you often start by agreeing to an acceptable use policy, requesting access to the system as well as an online identify, and then interacting with the network while being notified of security breaches and relevant system maintenance/outages. A final category of departmentalization is based on the *customer* the organization seeks to reach. For example, an assessment organization may departmentalize according to government, industrial, or private consumers. Process departmentalization can help organizations better offer products and services, even if the process needs to be changed occasionally.[27]

Departmentalization Implications for OB Organizations do not always stay with the departmentalization structure they initially adopt. Microsoft, for instance, used customer departmentalization for years, organizing around its customer bases: consumers, large corporations, software developers, and small businesses. In June 2013, Microsoft announced a restructuring to functional departmentalization, citing a need to foster continuing innovation. The new departments grouped jobs by traditional functions, including engineering, marketing, business development, strategy and research, finance, HR, and legal.[28] Microsoft continued to struggle with the reorganization, announcing additional changes in its leadership personnel and team structure less than a year later. These changes included, for example, product specialization and functional specialization; for instance, the PowerPoint, Excel, and Access teams have been reorganized into content creation and data visualization teams.[29] Since then,



A global firm that operates on a local scale in more than 200 countries, The Coca-Cola Company is organized into five geographic segments: North America, Latin America, Europe, the Middle East and Africa, and Asia Pacific. The structure enables it to tailor its strategy to markets in different stages of economic development and with differing consumer tastes and buying behavior.

Source: Kim Kyung-Hoon/Reuters

Microsoft has restructured yet again to primarily departmentalize by product type, with smaller groups organized by function and geographic segment (U.S. and international).[30] The changes in Microsoft's organizational structure were expected to "reshape how we interact with our customers, developers, and key innovation partners, delivering a more coherent message and family of product offerings."[31]

These more *divisional* structures (e.g., product, geographical, process, and customer departmentalization) have the opposite benefits and disadvantages of the simple structure.[32] They facilitate coordination in units to achieve on-time completion, budget targets, and development and introduction of new products to market while addressing the specific concerns of each unit. They provide clear responsibility for all activities related to a product, but with duplication of functions and costs. Sometimes this is helpful—say, when the organization has a unit in Spain and another in China, and a marketing strategy is needed for a new product. Marketing experts in both places can incorporate the appropriate cultural perspectives into their region's marketing campaigns. However, having marketing function employees in two different countries may represent an increased cost for the organization, in that it is doing basically the same task in two different places.

As we see throughout this text, whenever changes are deliberately made in organizations to align practices with organizational goals, particularly the goals of strong leaders, a good execution of the changes creates a much higher probability for improvement.

Chain of Command

While the chain of command was once a basic cornerstone in the design of organizations, it has far less importance today. But managers should still consider its implications, particularly in industries that deal with potential life-or-death situations when people need to rely quickly and suddenly on decision makers. The **chain of command** is an unbroken line of authority that extends from the top of the organization to the lowest echelon and clarifies who reports to whom.[33] But first, we cannot discuss the chain of command without also discussing *authority* and *unity of command*.

chain of command The unbroken line of authority that extends from the top of the organization to the lowest echelon and clarifies who reports to whom.

Authority

Authority, essentially formal power as discussed in the earlier chapter on power and politics, refers to the rights inherent in a managerial position to give orders and expect them to be obeyed. To facilitate coordination, each managerial position is given a place in the chain of command, and each person is given a degree of authority to meet their responsibilities. In chains of command where most of the authority is vested in one person, LMX (see the chapter on leadership) becomes more important, as the leader's "buy-in" becomes more important to getting things done.[34]

authority The rights inherent in a managerial position to give orders and to expect the orders to be obeyed.

Unity of Command

Unity of command states that a person should have one and only one superior to whom they are directly responsible. If the unity of command is broken, an employee might have to cope with conflicting demands or priorities from several supervisors.[35] Although unity of command is more common than having multiple supervisors, if you do find yourself in the situation where you report to multiple people, be aware of your own workload, conflicting messages, who has the "final say" in disputes, and loyalty expectations.[36] Furthermore, you should try to be proactive about your workload, foster communication between your supervisors, and set up boundaries and norms for effective communication and workflow.

unity of command The idea that a subordinate should have only one superior to whom they are directly responsible.

Chain of Command Implications for OB Times change, and so do the basic tenets of organizational design. The chain of command in many ways is considered an "old-fashioned" approach to structure,[37] and as we will learn as we progress through the chapter, collaborative, flexible, and self-organizing approaches tend to be more popular. A low-level employee today can access information in seconds that was available only to top managers a generation ago, and many employees are empowered to make decisions previously reserved for management.[38] Considering the popularity of self-managed and cross-functional teams (see the chapter on work teams), you can see why authority and unity of command may appear to hold less relevance.

Yet many organizational leaders still believe that they are the most productive when they enforce a chain of command. Indeed, one survey of more than a thousand managers found that 59 percent agreed with the statement "There is an imaginary line in my company's organizational chart. Strategy is created by people above this line, while strategy is executed by people below the line." However, this same survey found that lower-level employees' buy-in (agreement and active support) to the organization's overall, big-picture strategy was inhibited by their reliance on the hierarchy for decision making.[39] Perhaps the biggest drawback to the "chain of command" is its detrimental effects on creativity and innovation. Authority and unity of command both can negatively affect the idea generation process and put a strain on innovation implementation.[40]

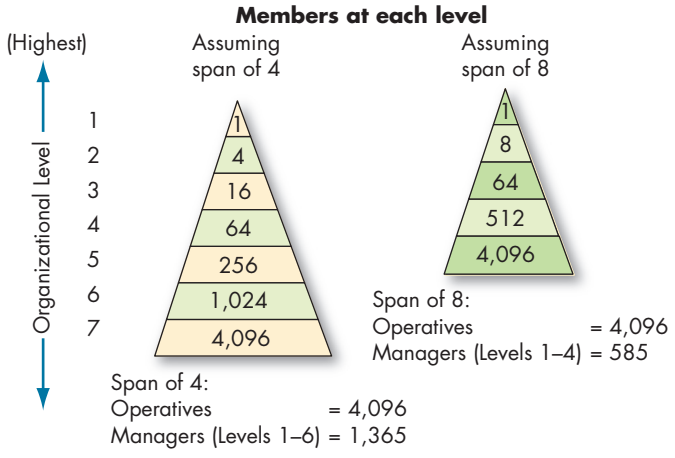
Span of Control

span of control The number of subordinates that a manager can direct efficiently and effectively.

How many employees can a manager direct efficiently and effectively? The **span of control** describes the number of levels (or layers) and managers in an organization.[41] All things being equal, the wider or larger the span, the fewer the levels, and the more employees at each level, the more efficient the organization.[42]

Narrow or small spans have their advocates. By keeping the span of control to five or six employees, a manager can maintain close control.[43] But narrow spans have three major drawbacks.[44] First, they are expensive because they add levels of management. Assume two organizations each have about 4,100 operative-level employees. One has a uniform span of four and the other a span of eight. As Exhibit 15-3 illustrates, the wider span of eight will have two fewer levels and approximately eight hundred fewer managers. If the average manager

Exhibit 15-3 Contrasting Spans of Control



in the organization makes $60,000 a year, the wider span will save $48 million a year in management salaries! Second, narrow spans make vertical communication in the organization more complex. The added levels of hierarchy slow down decision making and can isolate upper management. Third, narrow spans encourage overly tight supervision and discourage employee autonomy. Supervisors no longer have time to provide subordinates with the necessary leadership and support; thus, employee performance suffers.[45]

The trend in recent years has been toward wider spans of control.[46] However, to ensure that performance does not suffer because of these wider spans, organizations might invest heavily in employee training because managers recognize they can handle a wider span best when employees know their jobs well or can turn to coworkers with questions.

Centralization and Decentralization

Centralization refers to the degree to which decision making is concentrated at a single point in the organization.[47] In *centralized* organizations, top managers make all the decisions, and lower-level managers merely carry out their directives. In organizations at the other extreme, *decentralized* decision making is pushed down to the managers closest to the action or to workgroups.[48] The concept of centralization includes only formal authority—that is, the rights inherent to a position. Management centralization efforts are often directed toward decision making by lower-level managers, who are closer to the action and typically have more detailed knowledge about problems than top managers. When the COVID-19 pandemic hit, decentralization became the default mode for many organizations, as decision making was delegated to localized teams empowered to make decisions about following local health and safety regulations and guidelines.[49] However, centralization is not limited to members within the organization—sometimes, decision-making authority can be allocated to external managers or highly skilled employees in other firms that are contracting with the organization. In these instances, there is a greater likelihood for organizational change and innovation.[50]

centralization The degree to which decision making is concentrated at a single point in an organization.

A decentralized organization can act more quickly to solve problems, more people provide input into decisions,[51] leaders take on the role of championing employees to accomplish goals,[52] and employees are less likely to feel alienated from those who make decisions that affect their work lives.[53] Centralized organizations are better for avoiding commission errors (bad choices), while decentralized organizations are better for avoiding omission errors (lost opportunities).[54] Concerning creativity, research on a large number of Finnish organizations demonstrated that companies with decentralized research and development (R&D) offices in multiple locations were better at producing innovations than companies that centralized all R&D in a single office.[55] Decentralization is often necessary for companies with offshore sites because localized decision making is needed to respond to each region's opportunities, client base, and specific laws, while centralized oversight is needed to hold regional managers accountable. Failure to successfully balance these priorities can harm not only the organization but also its relationships with foreign governments.[56] Sometimes, however, both centralization and decentralization can be double-edged swords—one study of nearly three thousand U.S. Air Force officers suggests that there can be negative effects of decentralization in organizations with multiteam systems, including excessive risk seeking and coordination failures.[57] Moreover, when voice is centralized in organizations (e.g., only a few people or leaders speaking up), employees' knowledge is not fully utilized, and the organization can perform more poorly as a result.[58]

Formalization

formalization The degree to which jobs within an organization are standardized.

Formalization refers to the degree to which jobs within the organization are standardized.[59] If a job is highly formalized, the employee has a minimal amount of discretion over what to do (e.g., there are explicit job descriptions) and when and how to do it, resulting in consistent and uniform output. There are lots of organizational rules and clearly defined procedures covering work processes. Clerical workers at a publishing firm, for example, generally have very formalized jobs in which there are standard procedures and expectations for what they do. Conversely, where formalization is low, job behaviors are relatively unprogrammed and employees have a great deal of freedom to exercise discretion in their work. For example, publishing representatives who call on college professors to inform them of their company's new publications have a great deal of freedom in their jobs. They have a general standardized sales pitch, which they tailor as needed, and rules and procedures governing their behavior may be little more than suggestions on what to emphasize about forthcoming titles and the requirement to submit a weekly sales report.

Sometimes, formalization can be detrimental to organizational effectiveness. Research on ninety-four high-technology Chinese firms indicated that formalization can hurt team flexibility in decentralized organization structures, suggesting that formalization does not work as well where duties are inherently interactive or where there is a need to be flexible and innovative.[60] On the other hand, sometimes it is beneficial: For instance, formalizing pay determinations for jobs reduces gender inequality in most circumstances.[61] Furthermore, issues of fairness and ethics matter. If the formalization is fair and legitimate (e.g., board members are given tasks, duties, appointments, and titles commensurate with their worth), turnover can be prevented as employees worry less about making sense of their positions and are not as overburdened with coordination and clarification demands.[62] Finally, in times of complexity and turbulence, formalization can be a good thing when organizational members are driven to collaborate with one another to pull through the crisis.[63]

Boundary Spanning

To this point, we have described how organizations can create well-defined task structures and chains of authority. These systems facilitate control and coordination for specific tasks, but if there is too much division within an organization, attempts to coordinate across groups can be disastrous. One way to overcome this sense of compartmentalization and retain the benefits of structure is to encourage or create boundary-spanning roles.

boundary spanning Individuals forming relationships outside their formally assigned groups.

Boundary spanning occurs when individuals form relationships with people outside their formally assigned groups.[64] For instance, an HR executive who frequently engages with the IT group is engaged in boundary spanning, as is a member of an R&D team who implements ideas from a production team. These activities help prevent formal structures from becoming too rigid and, not surprisingly, enhance organization and team creativity, decision making, knowledge sharing, and performance.[65] Boundary spanning can be an excellent tool for expatriates and local workers to collaborate: For example, one global study of aid workers from nearly sixty humanitarian aid organizations found that office leaders play a boundary-spanning role that serves to connect groups and facilitate joint learning and creativity.[66]

Boundary-spanning activities occur not only within but also between organizations.[67] Executives and employees transfer knowledge across organizational



BMW encourages all employees, including this production worker at its plant in Jakarta, Indonesia, to build relationships throughout the global company. Boundary spanning at BMW links R&D, design, production, and marketing individuals to speed problem solving and innovation and to adapt to market fluctuations.

Source: Dadang Tri/Bloomberg/Getty Images

boundaries, translate information or communicate insights that may not have been realized yet, make connections with other organizations, or even transform the organization through influence.[68] Positive results are especially strong in organizations that encourage extensive internal communication; in other words, external boundary spanning is most effective when it is followed up with internal boundary spanning.[69] Although you might think that leaders should be the ultimate boundary spanners, sometimes the relationships between employees across companies (e.g., salesperson–client) are even stronger than those between organizational leaders.[70] Regardless, interorganizational boundary spanning can be a bad thing. For instance, if an employee leaves to go to a competitor, although that employee may serve as a "connection" between the two networks, that employee is also more likely to leak sensitive information.[71] Moreover, it is easy for executives to underestimate their own knowledge of their networks.[72]

Organizations can use formal mechanisms to facilitate boundary-spanning activities. One method is to assign formal liaison roles or develop committees of individuals from different areas of the organization.[73] Development activities can also facilitate boundary spanning—for instance, learning the jargon, methods, and practices of other groups can be helpful in bridging the gap between groups.[74] Employees with experience in multiple functions, such as accounting and marketing, are more likely to engage in boundary spanning.[75] Many organizations may try to set the stage for these sorts of positive relationships by creating job rotation programs so new hires get a better sense of different areas of the organization. Another method to encourage boundary spanning is to bring attention to overall organizational goals, such as efficiency and innovation, and shared identity concepts so that employees are more comfortable reaching out to others.[76]

You probably have personal experience with at least some of the results of decisions that leaders have made in your school or workplace that were related to the elements of organizational structure. The organizational framework, which can be depicted by drawing an organizational chart, can help you clarify these leaders' decisions. We will discuss them next.

Common Organizational Frameworks and Structures

15-2 Identify the characteristics of the simple structure, the bureaucracy, and the matrix structure.

Organizational designs are known by many names and are constantly evolving in response to changes in the way work is done. We will start with three of the more common organizational frameworks: the *simple structure*, the *bureaucracy*, and the *matrix structure*.

The Simple Structure

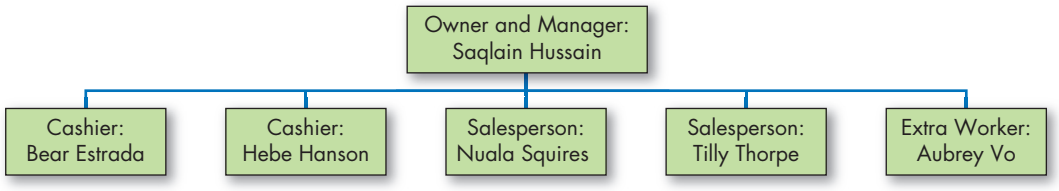
simple structure An organizational structure characterized by a low degree of departmentalization, wide spans of control, authority centralized in a single person, and little formalization.

A **simple structure** is common in many startups, such as those found in Silicon Valley. The modern tech startup is driven by an entrepreneurial founder, supported by a core set of loyal employees who work long hours, who enacts a unifying vision.[77] The simple structure has a low degree of departmentalization, wide spans of control (e.g., a flat organization), authority centralized in a single person, and little formalization.[78] It usually has only two or three vertical levels, a loose body of employees, and one individual with decision-making authority. Most companies start as a simple structure, and many innovative technology-based firms with short life spans, like cell phone app development firms, remain compact by design.[79]

Exhibit 15-4 is an organization chart for a retail men's store owned and managed by Saqlain Hussain. Saqlain employs two full-time salespeople, two cashiers, and an extra worker for weekends and holidays, but Saqlain "runs the show." Although this type of organization is typical for a small business, in times of crisis large companies often simplify their structures (though not to this degree) as a means of focusing their resources.

Simple structures are strong because they are, well, simple. They are fast, flexible, and inexpensive to operate, and accountability is clear. One major weakness is that such a structure becomes increasingly inadequate as an organization grows because its low formalization and high centralization tend to create information overload at the top. Decision making typically becomes slower as the single executive tries to continue doing it all. This proves the undoing of many small businesses. If the structure is not changed and made more elaborate, the firm often loses momentum and can eventually fail.[80] The simple structure's other weakness is that it is risky—everything depends on one person. If the owner–manager becomes ill, it can literally halt the organization's information and decision-making capabilities.[81]

Exhibit 15-4 A Simple Structure (Jack Gold's Men's Store)



The Bureaucracy

Standardization! That is the key feature underlying all bureaucracies. Consider the government offices that collect taxes, enforce health regulations, and provide local fire protection. They all rely on standardized work processes for coordination and control, what some have referred to colloquially as "red tape."[82] The **bureaucracy** is characterized by highly routine operating tasks achieved through specialization, formalized rules and regulations, departmentalization, centralized authority, narrow spans of control, and decision making that follows the chain of command.[83] Bureaucracy incorporates all the strongest degrees of departmentalization described earlier.

bureaucracy An organizational structure with highly routine operating tasks achieved through specialization, very formalized rules and regulations, tasks that are grouped into functional departments, centralized authority, narrow spans of control, and decision making that follows the chain of command.

Bureaucracy is a dirty word in many people's minds. However, it does have advantages, primarily the ability to perform standardized activities very efficiently. Putting like specialties together in units results in economies of scale, minimum duplication of people and equipment, and a common language that employees all share. Bureaucracies can get by with less talented—and hence less costly—middle- and lower-level managers because rules and regulations substitute for managerial discretion. There is little need for innovative and experienced decision makers below the level of senior executives, and innovative employees often do not mesh well with bureaucracy.[84]

Listen to this conversation among four executives in one company: "You know, nothing happens in this place until we *produce* something," said the production executive. "Wrong," commented the R&D manager, "Nothing happens until we *design* something!" "What are you talking about?" asked the marketing executive, "Nothing happens until we *sell* something!" The exasperated accounting manager responded, "It doesn't matter what you produce, design, or sell. No one knows what happens until we *tally up the results*!" This conversation highlights how bureaucratic specialization can create conflicts in which the unit perspectives override the overall goals of the organization.

The other major weakness of a bureaucracy is something many have witnessed firsthand: obsessive concern with following standard procedures and practices. When cases do not fit "the way things are done around here" precisely, there is no room for modification. The bureaucracy is efficient only if



Hospitals benefit from standardized work processes and procedures common to a bureaucratic structure because they help employees perform their jobs efficiently. At the Hospital Policlinica Gipuzkoa, San Sebastián, Spain, doctors and nurses follow formal rules and regulations in the intensive care unit.

Source: agefotostock/Alamy Stock Photo

Myth or Science?

Bureaucracy Is the Enemy of Innovation and Productivity

Surveys indicate that, on average, organizations are becoming more bureaucratic. They are becoming more centralized, conservative, and rule-bound. There was a time when bureaucracy was considered to be innovative and progressive. A specialized division of labor and hierarchy of authority were thought to allow companies to expand more than they had before. Though many fiercely oppose bureaucracy—Walmart CEO Doug McMillon has gone as far as referring to it as a "villain," and the CEO of JPMorgan Chase concurs that it is "a disease." Yet is bureaucracy really the enemy of innovation and productivity, or is it possible for individuals to make bureaucracy less burdensome?

Research comparing bureaucratic expectations in two different settings found that employees could fulfill these expectations with minimal complaining or frustration. In other words, making bureaucracy work for them allowed employees to control the tasks that mattered to them. They were also able to do so because the bureaucracy was a shared burden, not an individual one. Rather than eliminating it altogether, connecting bureaucratic tasks to benefits employees value can effectively ensure these tasks do not negatively impact innovation or productivity.

While bureaucracy can serve its purpose, sometimes it is necessary to "liberate" individuals from bureaucracy, particularly when it becomes excessive. As the CEO of Pfizer (the world's largest pharmaceutical company) described, declining government funding was essential to reduce the barriers of bureaucracy and protect scientists from needless delays. Ultimately, this allowed Pfizer to develop a COVID-19 vaccine in record time—just six months. Data suggests that bureaucracy can indeed be a time trap, with an average of 28 percent of employees' time being spent on bureaucratic tasks. Furthermore, two-thirds of respondents believe bureaucracy significantly decreases the rate of decision making. It can also lead to inertia within an organization and make innovation difficult. While companies such as Google and Amazon encourage bottom-up innovation, there are significantly more organizations with more than 1,000 employees in which employees report experiencing challenges when trying to launch new initiatives.

Thus, bureaucracy can certainly negatively impact employees' ability to innovate and be productive. However, eliminating most bureaucratic tasks is often not possible or practical. On the other hand, bureaucracy does not necessarily have to be the enemy of productivity or innovation. If bureaucratic tasks are implemented in a way that is not overly burdensome to employees, they may help them achieve their goals.[88]

employees confront familiar problems with programmed practices and procedures.[85] This rigid adherence to procedures and practices makes it more difficult for new practices to catch on within different units in a bureaucracy. For instance, a social recognition program (see the chapter on motivation application) was successful in bureaucracies in one state of Niger, Africa—but was completely unsuccessful in another due to its unique context and nature.[86] Moreover, the standardization and rule adherence that benefit it also result in additional drawbacks: Bureaucratic structures may result in diminished autonomy and motivation for employees within these systems, making it difficult to develop and maintain motivation.[87]

The Matrix Structure

matrix structure An organizational structure that creates dual lines of authority and combines functional and product departmentalization.

The **matrix structure** combines functional and product departmentalization, and these types of structures can be found in a multitude of organizations, such as advertising agencies, universities, and entertainment companies.[89] Organizations with a matrix structure create a dual line of authority, so that there are multiple people accountable, depending upon their function and product. One survey by Gallup found that 84 percent of employees in the

Exhibit 15-5 **Matrix Structure for a College of Business Administration**

Programs / Academic Departments	Undergraduate	Master's	Ph.D.	Research	Executive Development	Community Service
Accounting						
Finance						
Decision and Information Systems						
Management						
Marketing						

United States are in matrixed organizations.[90] Companies that use matrix-like structures include Samsung, BASF, and L'Oréal.[91]

The most obvious structural characteristic of the matrix is that it breaks the unity of command discussed earlier. Exhibit 15-5 shows the matrix for a college of business administration. The academic departments of accounting, decision and information systems, marketing, and so forth, are functional units. Overlaid on them are the specific programs (services). Employees in the matrix have two supervisors: their functional department managers and their product managers. A professor of accounting teaching an undergraduate course may report to the director of undergraduate programs as well as to the chairperson of the accounting department.

Matrices can help facilitate coordination when the organization has several complex and interdependent activities.[92] Direct and frequent contacts between different specialties in the matrix can let information permeate the organization and reach the people who need it more quickly. Consider the case of the terrible snow during the winter of 2018. Boston's Logan International Airport was best equipped to deal with this disaster as a result of its matrix structure, whereas JFK was left with delays for days that made news worldwide due to over-delegated authority and reliance on third-party contractors.[93] The matrix reduces so-called "bureaupathologies"—its dual lines of authority limit people's tendency to protect their territories at the expense of the organization's goals.[94] A matrix also achieves economies of scale and facilitates the allocation of specialists by both providing the best resources and ensuring that they are efficiently used.[95]

However, some disadvantages of the matrix structure lie in the confusion it creates, its tendency to foster power struggles, and the stress it places on individuals.[96] For individuals who desire security and absence from ambiguity, this structure can be stressful. Reporting to more than one boss introduces role conflict, and unclear expectations introduce role ambiguity. Without unity of command, ambiguity about who reports to whom is significantly increased and often leads to conflict and power struggles between functional and product managers.

Some of these disadvantages can be offset through culture (see the next chapter), especially one that values agility, flexibility, fluidity, collaboration, and a clear direction. For example, Spotify espouses these key values

while organizing individuals into "squads," "guilds," "chapters," and "tribes" that fulfill the mission of Spotify through so-called *agile matrices*.[97] Loosely speaking, the "tribes" and the teams that comprise them (e.g., "squads") are focused on specific products or services Spotify provides. "Chapters" are made up of people who do similar jobs across products/services (e.g., database administrators, front office developers, etc.). The cross-section of tribes and chapters makes up the traditional matrix, like the one shown in Exhibit 15-5. However, where things truly get interesting is with the formation of "guilds." "Guilds" are amorphous collections of members who merely share the same interests and want to consistently improve upon their shared interests. Organizing in this way has enabled Spotify to quickly throw together squads to accomplish temporary objectives without needing to worry about who reports to whom.

Newer Trends in Organizational Design

15-3 Identify the characteristics of the virtual structure, the team structure, and the circular structure.

With the increasing trend toward flatter structures, many organizations have been developing alternative options with fewer layers of hierarchy and more emphasis on opening the boundaries of the organization.[98] In this section, we describe three such designs: the *virtual structure*, the *team structure*, and the *circular structure*.

The Virtual Structure

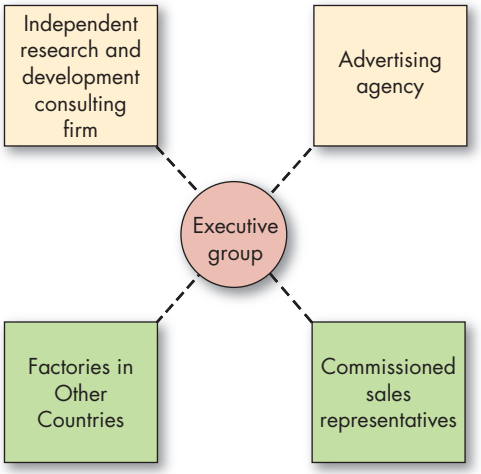
virtual structure A small, core organization that outsources major business functions.

Why own when you can rent? That question captures the essence of the **virtual structure** (also sometimes called the *network* structure), typically a small, core organization that outsources its major business functions.[99] The virtual structure is highly centralized, with little or no departmentalization. These types of structures open up boundaries between organizations.

The prototype of the virtual structure is today's filmmaking organization. In Hollywood's golden era, movies were made by huge, vertically integrated corporations. Studios such as Metro-Goldwyn-Mayer (MGM), Warner Bros., and 20th Century Fox owned large movie lots and employed thousands of full-time specialists—set designers, camera people, film editors, directors, and actors. Today, many movies are made by a collection of individuals and small companies who come together and make films project by project. This structural form allows each project to be staffed with the talent best suited to its demands rather than just with the people employed by the studio. It minimizes bureaucratic overhead because there is no lasting organization to maintain. It lessens long-term risks and their costs because there is no long term—a team is assembled for a finite period and then disbanded.

Recently, streaming services like Netflix, Hulu, Amazon Prime, and Disney+ have been churning out massive amounts of "original content" for their viewers. Although some of this content is actually exclusively licensed and not original, much of it is created by the streaming services.[100] The virtual structure allows these companies to assemble content very quickly. Take for instance *Yasuke*, an anime series loosely based on the story of a samurai from Africa. Yasuke served as a bodyguard to daimyo Oda Nobunaga in the sixteenth century after arriving in Japan with an Italian Jesuit missionary. Netflix brought together a diverse talent pool in LeSean Thomas (the creator of *Black Dynamite* and *The Boondocks*) and LaKeith Stanfield (who also starred in *Get Out, Sorry to Bother You*, and *Judas and the Black Messiah*) as the voice of Yasuke, among others. It enlisted the MAPPA anime studio in Tokyo to bring the animation to life. And it signed the Grammy-nominated Flying Lotus for the score and opening (OP) and

Exhibit 15-6 A Virtual Structure



ending (ED) songs (along with the extremely talented musician, Thundercat) and countless other in-house and out-of-house professionals.[101] Clearly, virtual structures enable organizations to quickly band together diverse talent to make stories come to life.

Exhibit 15-6 shows a virtual structure in which management outsources all the primary functions of the business. The core of the organization is a small group of executives whose job is to oversee directly any activities done in-house and to coordinate relationships with organizations that manufacture, distribute, and perform other crucial functions. The dotted lines represent the relationships typically maintained under contracts. Managers in virtual structures spend most of their time coordinating and controlling external relations.

Network organizations often take many forms.[102] Some of the more traditional forms include the *franchise form*, in which there are managers, systems, and other experts in the central node (i.e., executive group) and customer sales and services are carried out by franchise units. This popular form of network organization is very common in service business models, such as 7-Eleven, McDonald's, Jimmy John's, and Dunkin' Donuts. In this form, however, franchisees do not tend to collaborate or coordinate with one another, are difficult to influence by the executive group, and may even be in direct competition for resources from the executive group. For instance, one study of franchises found that there is variability in how mission statements are formed at each franchise along with how well they consider ethical standards. These differences subsequently impact how much discrimination is experienced at each franchise.[103] Moreover, there is often extreme tension between the organization's desire for standardization and franchisees' desire for business autonomy,[104] which can contribute to differences in franchisee performance across locations.[105]

In the *hollow form*, the organization only outsources noncritical functions.[106] For instance, Ascendle builds web and mobile apps for companies—although an organization could technically expend the resources to make these for itself, often it is not cost-effective and easier to outsource the job (while retaining critical functions like human resources in-house).[107] During the COVID-19 pandemic, which put massive demands on technology, technology support, and broadband capacity due to the number of people working from home, IT

outsourcing became an even bigger business, with many firms enlisting the help of outside IT contracting firms to handle this function.[108] Similarly, a *modular form* enables the organization to outsource a noncritical part of a *product*. Computer manufacturers like Dell do not make every single part that comprises their laptops and personal computers. Indeed, companies like AMD provide processors, AU Optronics provides the display, and IBM provides the disk storage used in many Dell computers.[109] Another example is the *starburst form*, in which a parent firm splits off one of its functions into a spinoff firm.[110] For example, in 2012, Netflix split off its DVD function into a separate entity, now DVD.com.[111] More recently, IAC planned to spin off popular video service Vimeo in 2021.[112]

Virtual structures offer flexibility that allows individuals with an innovative idea and little money to successfully compete against larger, more established organizations. The structure also saves a great deal of money by eliminating permanent offices and hierarchical roles for outsourced functions.[113] On the other hand, the drawbacks have become increasingly clear as its popularity has grown.[114] Virtual organizations are in a state of perpetual flux and reorganization, which means roles, goals, and responsibilities are unclear, setting the stage for increased political behavior. Looking back to the earlier example of the winter of 2018 snow emergency, JFK utilized more of a virtual organization structure, which (during crisis) limited its communication and agility.[115]

The Team Structure

team structure An organizational structure that replaces departments with empowered teams and that eliminates most horizontal boundaries and external barriers between customers and suppliers.

The **team structure** seeks to eliminate the chain of command and replace departments with empowered teams.[116] This structure removes most vertical and horizontal boundaries in addition to breaking down most external barriers between the company and its customers and suppliers. Functional departments create horizontal boundaries between functions, product lines, and units—to reduce them, these organizations replace functional departments with cross-functional teams and organize activities around processes. Although the team structure has been called by a number of names (e.g., skunk works, holocracies, amoeba organizations, ambidextrous organizations, boundaryless organizations, meta-teams, market-oriented ecosystems), they all share the same properties: (1) They set aside a platform of resources (e.g., people, technology, money) dedicated to market opportunities, (2) leaders assign independent teams to each market opportunity, and (3) these teams are empowered to anticipate customers' needs and demands and respond with agility and speed.[117]

By removing bureaucratic roadblocks to success, management flattens the hierarchy and minimizes status and rank. A recent review of nearly fourteen thousand teams suggests that hierarchy can engender conflict that can, in turn, limit the effectiveness of teams.[118] Cross-hierarchical teams (which include top executives, middle managers, supervisors, and operative employees), participative decision-making practices, and the use of 360-degree performance appraisals (in which peers and others evaluate performance) can be used. For example, at the Danish firm Oticon, the world's largest hearing aid manufacturer, all traces of hierarchy have disappeared.[119] Everyone works at uniform mobile workstations, and project teams, not functions or departments, coordinate work.

Many organizations have adopted the team structure in all or part of its structure. Xerox, for instance, develops new products through multidisciplinary teams that work on a single process instead of on narrow functional tasks.[120] *Skunk Works* teams, like those used by Lockheed Martin, work in focused isolation with a trusting project leader relying on diverse talent to drive breakthrough innovation in short amounts of time.[121] Apart from these examples, some

organizations take the team structure approach as a cardinal characteristic of their culture and structure (see the chapter on culture and change). Amazon, for instance, describes itself as a "Day 1 culture." Employees "obsess over the customer and their needs," maintain a long-term focus, and boldly innovate to meet those needs. The team structure meets this need and leaves behind rigid structures that are slow, bureaucratic, and authoritative (what Amazon refers to as "Day 2 cultures") for those that are innovative, agile, and empowering to teams.[122]

When fully operational, the team structure may break down geographic barriers. Today, many companies, like Coca-Cola and McDonald's, do as much business overseas as in the United States, and some struggle to incorporate geographic regions into their structure. In other cases, the team approach is need-based. Such is the case with Chinese companies, which made ninety-three acquisitions in the oil and gas industry in five years—incorporating each acquisition as a new team unit—to meet forecasted demand that their resources in China could not meet.[123] Some organizations create teams incorporating their employees and their customers or suppliers. For example, to ensure that important product parts are made reliably and to exacting specifications by its suppliers, Honeywell International partners some of its engineers with managers at those suppliers. The team structure provides a solution because it considers geography as more of a tactical, logistical issue than a structural one. In short, the goal may be to break down cultural barriers and open opportunities.

An Ethical Choice

Flexible Structures, Deskless Workplaces

Once upon a time, students fresh from business schools could not wait for that first cubicle to call home, mid-level managers aspired to an office of their own, and executives coveted the corner office. These days, the walls are coming down. As organizational structures change, so do their physical environments. Many organizations have been trying to make the physical environment reflect the organizational structures they adopt.

At online retailer Zappos, not even the CEO wants an office. All fourteen hundred employees are welcome throughout the open spaces (although many worked from home during the COVID-19 pandemic). Firms like Google have workplace designs of public rooms with lounge areas and large, multiperson tables. According to Edward Danyo, former manager of workplace strategy at pharmaceuticals firm GlaxoSmithKline, shared environments create efficient work gains, including an increase in the speed of decision making. But there are ethical concerns about the dismantling of the physical and mental organizational structure:

- *Where will confidential discussions take place?* In some contemporary workplace designs, ad hoc conference rooms address the need for separate gatherings. This may not be optimal if the walls are made of glass, if employees will feel stigmatized when called into a meeting room, or if they become reluctant to approach HR staff with issues because of privacy concerns.
- *How can differences in personality traits be overcome?* Employees high in extroversion will be more comfortable building collaborative relationships without assigned workspaces. In contrast, introverted individuals may be uncomfortable without an established office structure to get to know others over time.
- *How can personal privacy be maintained?* Zappos gives employees personal lockers, asks employees to angle laptop screens away from neighbors, and tries to make open spaces more private by encouraging earbuds to create a sound barrier between working employees.
- *How can you assure your clients about confidentiality?* Even walled, soundproof rooms for virtual or live meetings may not provide the desired level of security for clients who need to know their business will stay on a need-to-know basis.
- *How will expectations and accountabilities be enforced?* In an environment without offices and sometimes without job titles, there is an even greater need for clearly assigned goals, roles, and expectations. Otherwise, open, collaborative structures may foster the diffusion of responsibility and confusion.[124]

The Circular Structure

circular structure An organizational structure in which executives are at the center, spreading their vision outward in rings grouped by function (managers, then specialists, then workers).

Picture the concentric rings of an archery target (see Exhibit 15-7). In the center is the CEO, followed by the executives on the top management team (TMT), and radiating outward in rings grouped by function are the directors and then the specialists and workers. This is the **circular structure**.[125] Note that the circular structure is virtually identical to the simple, vertical, hierarchical structures we have seen earlier in this chapter.[126] The differences can be found in the way the information is conveyed—instead of conveying hierarchy as a top-down chain of command, the circular structure is meant to rebrand this perception into one that sees the organization more as a team with top management at the very heart of the organization and its vision spreading outward. Moreover, segments in the circular structure are less defined than the clear, point-to-point linkages in the simple structure.

The circular structure has intuitive appeal for creative entrepreneurs, and some small innovative firms have claimed it. As in many of the current hybrid approaches, however, employees are apt to be unclear about whom they report to and who is running the show, especially without clear linkages between people in each "band." The concept may still have intuitive appeal for spreading a vision, such as executives whose firms are primarily focused on corporate social responsibility (CSR), for instance.

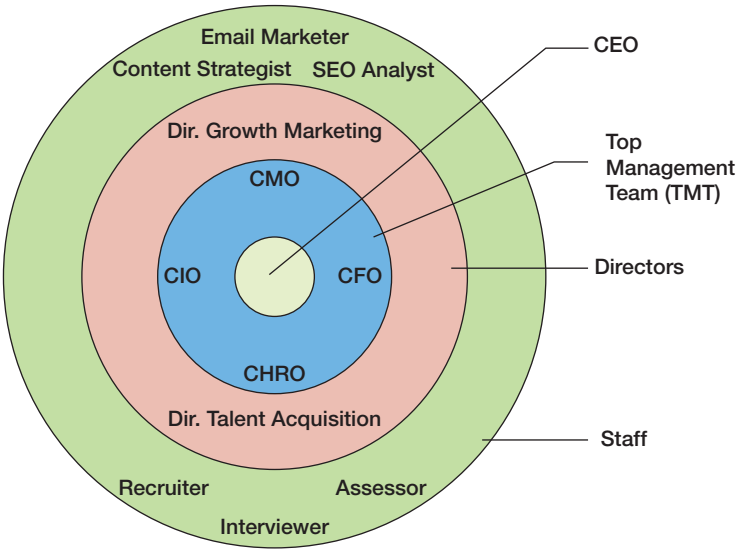
The Leaner Organization: Downsizing

15-4 Describe the effects of downsizing on organizational structures and employees.

Downsizing A systematic effort to make an organization leaner by closing locations, reducing staff, or selling off business units that do not add value.

The goal of some organizational structures we have described is to improve agility by creating a lean, focused, and flexible organization. **Downsizing** is a systematic effort to make an organization leaner by closing locations, reducing staff, or selling off business units that do not add value.[127] Downsizing might also involve *de-layering*, or narrowing the span of control by reducing the number of levels in a hierarchy. Downsizing does not necessarily mean physically shrinking the size of your office, although that has been happening, too (see OB Poll),

Exhibit 15-7 A Circular Structure



especially in the fallout of the COVID-19 pandemic (although, fewer people in the office means the office space per worker actually went up in 2020—to 196 square feet!).[128]

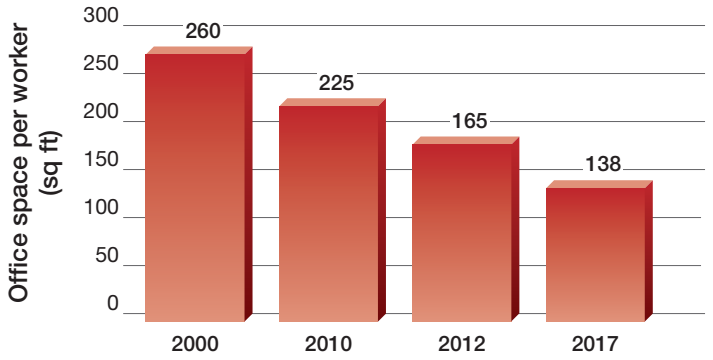
Although we frame it here as a strategic structuring decision, many firms do not have a choice and implement downsizing measures because of outside forces. For example, organizations may engage in downsizing along with work restructuring, wage, and employment freezes during times of natural disaster, pandemics (like the COVID-19 pandemic), and economic recessions.[129]For instance, CEOs often feel pressure to meet earnings estimates, which can then prompt downsizing.[130] Sometimes it is done for more nefarious reasons. For instance, one study found that CEOs who are paid less than their peers may be more likely to engage in layoffs and, following the layoffs, are more likely to receive pay increases if the firm performs better as a result.[131]

Some firms downsize to direct all their efforts toward their core competencies. Therefore, downsizing is a type of *lean management technique* (i.e., one that identifies and eliminates activity that is not valued by the customer or end user) to reduce bureaucracy and speed decision making.[132] American Express claims to have been doing this in a series of layoffs over more than a decade: Each layoff has been accompanied by a restructuring to reflect changing customer preferences away from personal customer service and toward online customer service. According to former CEO Ken Chennault, "Our business and industry continue to become transformed by technology. Because of these changes, we have the need and the opportunity to evolve our organization and cost structure."[131]

Despite the advantages of being a lean organization, the impact of downsizing on organizational performance is not without controversy.[134] Reducing the size of the workforce perhaps has positive outcomes in the long run, although most of the evidence suggests that downsizing has a negative impact on stock returns the year of downsizing (although this may be contingent on the organization's goals for downsizing along with other contextual factors).[135] An example of these contingencies can be found in the case of Russia's Gorky Automobile Factory (GAZ), which realized a profit for the first time in many years after Bo Andersson fired fifty thousand workers,

OB POLL

The Incredible Shrinking Office





Source: J. Cipolla, "How Much Office Space per Employee Do You Need?" *Squarefoot,* April 9, 2020, https://www.squarefoot.com/blog/office-space-per-employee/; CoreNet Global, "Office Space per Worker Will Drop to 100 Square Feet or Below for Many Companies Within Five Years, According to New Research From CoreNet Global," *CoreNet Global* [press release], February 28, 2012, https://www.prnewswire.com/news-releases/office-space-per-worker-will-drop-to-100-square-feet-or-below-for-many-companies-within-five-years-according-to-new-research-from-corenet-global-140702483.html#:~:text=All%20Products-,Office%20Space%20Per%20Worker%20Will%20Drop%20to%20100%20Square%20Feet,New%20Research%20From%20CoreNet%20Global

half the workforce.[136] Eventually, however, the rampant downsizing policy caught up with Andersson when he was CEO of Russia's largest car maker, AvtoVAZ. From 2014 to 2016, downsizing at its plant in Togliatti led to tens of thousands of workers losing their jobs. At the time, Sergei Chemezov, an ally of President Vladmir Putin, told Andersson that he was "playing with fire."[137] Eventually, Andersson was removed as CEO for his tactics in 2016—what tended to be standard practice in the West (downsizing) was frowned upon in Russia, where the auto industry is revered with nationalistic pride and jobs tend to be preserved rather than cut.[138]

Part of the problem is the effect of downsizing on employee attitudes.[139] From a broad perspective, many have argued that the prominence of downsizing has led employees across the world to be insecure about their jobs and uncertain about their careers.[140] Employees who remain often feel worried about future layoffs, may be less committed to the organization, and may experience a greater amount of stress and strain.[141] Downsizing can also lead to voluntary turnover, so vital human capital is lost.[142] The result is a company that is more anemic than lean. Paradoxically, some research suggests that the victims may even fare better than the survivors, experiencing higher control perceptions and less stress.[143]

Companies can reduce the negative impact of downsizing by preparing in advance, thus alleviating some employee stress and strengthening support for the new direction. Here are some effective strategies for downsizing:

- *Invest.* Companies that downsize to focus on core competencies are more effective when they invest in high-involvement work practices afterward.
- *Communicate.* When employers make efforts to discuss downsizing with employees early, employees are less worried about the outcomes and feel the company is taking their perspective into account.
- *Participate.* Employees worry less if they can participate in the process in some way. Voluntary early-retirement programs or severance packages can help achieve leanness without layoffs.
- *Assist.* Severance, extended health care benefits, and job search assistance demonstrate that a company cares about its employees and honors their contributions.

In short, companies that make themselves lean can be more agile, efficient, and productive—but only if they make cuts carefully and help employees through the process.

Why Do Structures Differ?

15-5 Contrast the reasons for using mechanistic versus organic structural models.

mechanistic model A structure characterized by extensive departmentalization, high formalization, a limited information network, and centralization.

organic model A structure that is flat, uses cross-hierarchical and cross-functional teams, has low formalization, possesses a comprehensive information network, and relies on participative decision making.

Exhibit 15-8 differentiates between two extreme models of organizational design.[144] One model is the **mechanistic model**, which is generally synonymous with the bureaucracy in that it has highly standardized processes for work, high formalization, and more managerial hierarchy. The other extreme is the **organic model**, which is flat, has fewer formal procedures for making decisions, has multiple decision makers, and favors flexible practices.[145] Whether the organization is more mechanistic or organic has implications for which behaviors are most effective.[146] For example, research suggests that political behaviors (see the chapter on power and politics) tend to be more effective in mechanistic organizations,[144] whereas transformational leadership and empowerment (see the chapter on leadership) tend to be more effective in organic organizations.[148]

With these two models in mind, why are some organizations more mechanistic whereas others are more organic? What forces influence the choice of design? In this section, we present major causes or determinants of an organization's structure.[149]

Organizational Strategies

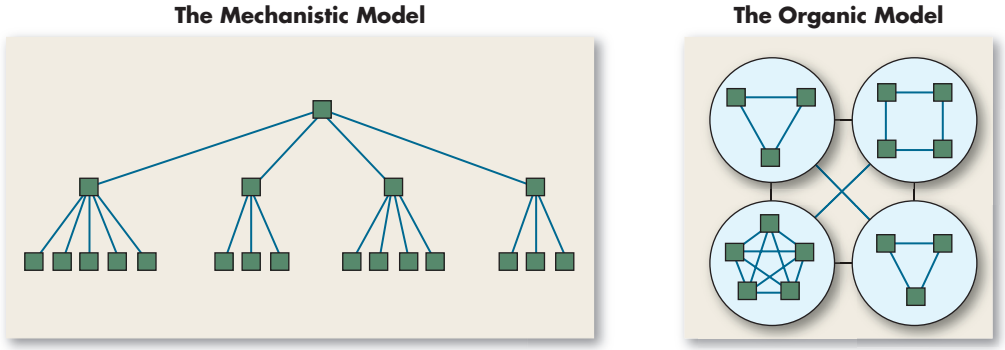
Because structure is a means to achieve objectives and objectives derive from the organization's overall strategy, it is only logical that structure should follow strategy. If management significantly changes the organization's strategy or its values, the structure must change to accommodate. For example, recent research indicates that aspects of organizational culture may influence the success of CSR initiatives.[150] If the culture is supported by the structure, the initiatives are more likely to have clear paths toward application. Regarding strategy, most current strategy frameworks focus on three strategy dimensions—innovation, cost minimization, and imitation—and the structural design that works best with each.[151]

Innovation Strategy To what degree does an organization introduce major new products or services? An **innovation strategy** strives to achieve meaningful and unique innovations.[152] Innovative firms use competitive pay and benefits to attract top candidates and motivate employees to take risks. Some degree of the mechanistic structure can benefit innovation. Well-developed communication channels, policies for enhancing long-term commitment, and clear channels of authority all may make it easier for rapid changes to occur smoothly. Obviously, not all firms pursue innovation. Tesla, Amazon, and Netflix do,[150] but some other firms do not.

innovation strategy A strategy that emphasizes the introduction of major new products and services.

Arguably, some degree of innovation is needed if the firm is to stay ahead of the competition. We can recall several instances in which companies failed to innovate, causing them to lose position in the market (e.g., Kodak, Blockbuster, etc.).[154] Steve Sasson invented the first digital camera in 1975. While working as an engineer at Kodak, Sasson took the camera to show management; their response was "That's cute—but don't tell anyone about it." Former Kodak executives noted that although they developed this, leadership was too focused on the success of film to notice the digital revolution and too afraid of how this innovation would affect the film market.[155] However, sometimes innovation does not work out in the face of competitors. For instance, Myspace's response to Facebook's popularity in the mid-2000s was to change its niche to entertainment and music, eventually leading to its decline as a social network.[156]

Exhibit 15-8 Mechanistic Versus Organic Models



cost-minimization strategy A strategy that emphasizes tight cost controls, avoidance of unnecessary innovation or marketing expenses, and price cutting.

Cost-Minimization Strategy An organization pursuing a **cost-minimization strategy** tightly controls costs, refrains from incurring unnecessary expenses, and cuts prices.[158] For example, India's Jet Airways did away with the first-class section in its Boeing 777 planes, enabling it to increase revenue by adding an additional fifty-four seats per plane in 2019.[159] But sometimes, cost minimization can hurt customer loyalty and perceptions of product quality, such as when you notice that the paper products in restrooms are of low quality (as one marketing

Toward a Better World

Grove Collaborative: Innovating in the CSR and Sustainability Market Space

Organizations approach CSR and sustainability in many different ways. Some organizations tack social responsibility initiatives onto their mission almost like a peripheral vision, primarily if the organization's products or services do not intrinsically involve CSR. Other organizations may offer a product or service that does lend well to CSR initiatives. They build it into the fabric of the product or service they offer. But are there organizations that pride themselves on developing *multiple* CSR-relevant products, adopting an innovation strategy to realize that aim?

Enter Grove Collaborative, a company that develops and offers a suite of sustainable products for customers and was recently ranked as the number two most socially responsible innovative company in 2021 by *Fast Company*. As one of its mottos states: "Change starts at home—ours and yours." As a certified B corporation, it is committed to being a one-stop shop for purchasing everyday household products suitable for environmental and human health. Specifically, it focuses on its impact on plastic, trees, and carbon emissions. Although it offers products from other sustainable companies (e.g., Dr. Brommer's, Method), it also offers its own products organized into four product divisions: household cleaning, personal care, baby & childcare, and pets. To make it easier for consumers to regularly use the products it offers, Grove provides a subscription service model (similar to Amazon's subscriptions). With this model, consumers can subscribe to their favorite Grove products to be delivered at regular intervals.

Have its structure and strategy been successful? To date, Grove Collaborative has been growing by leaps and bounds. In 2020, it made more than $250 million in total revenue from over two million customers, representing a 5,000 percent growth since 2016. As of 2020, it was valued at $1.32 billion and has raised more than $125 million from investors. Its wild success has led to several productive partnerships. For instance, it has recently partnered with Target, expanding into physical retail through a curated collection of its best-selling products. The partnership with Target was a strategic decision, allowing Grove to reach more customers and give it the ability to reach 90 to 95 percent of the market. As Stuart Landesberg (cofounder and CEO) noted, "When we think about what it means to manifest [our] vision of changing the category, it really is about expanding access as much as it is about innovation . . . We're already the market leader in vertical e-commerce, but the majority of the market is still purchasing through more traditional formats, like Target."

Strategy and financials aside, Grove Collaborative has been successful in achieving what it set out to achieve. Its triple-bottom-line approach toward making a positive impact on plastic, trees, and carbon has enjoyed many successes to date. For instance, Grove has set an ambitious move of becoming plastic-free by 2025—in fact, it is currently the first plastic neutral retailer in the world. To do this, it is converting to more eco-friendly packaging (e.g., glass, aluminum). Through a boundary-spanning initiative, it has formed a collaborative community of sixty-three suppliers to share best practices in going plastic-free. For those who do not cut plastic, Grove passes a "fee" or "tax" on to its suppliers to offset their use of plastic packaging. These efforts prevented two million pounds of plastic from entering landfills, prevented four million pounds of plastic from reaching consumers' hands, and led to recycling 5.3 million pounds of ocean-bound plastic. Beyond its monumental plastic goals, it has implemented similar ones with trees (e.g., planting one million trees by 2022) and carbon. In fact, it is already 100 percent carbon-neutral in its shipping and facilities.

Overall, the case of Grove Collaborative demonstrates how an innovation strategy can be adopted in the sustainability space on a large scale. It also demonstrates how boundary spanning can help organizations brainstorm and innovate to address significant sustainability challenges rather than work in isolated "silos." We will likely hear more about Grove Collaborative as it continues to grow in size and market share, and we may even see similar companies come into the works.[157]

author notes).[160] But even further, sometimes the public is unaware of these cost-cutting measures or remains "blissfully ignorant," as is the case with historical ethical and quality concerns levied against major American meat suppliers.[161] Regardless, with the advent of machine learning and artificial intelligence (AI), thought leaders have proposed a new philosophy that is not so focused on price cutting.[162] This strategy, *cost optimization*, focuses on looking at the bigger picture and making sure expenditures maximize long-term growth and profits. AI can empower organizations to quickly collect, process, and learn from mountains of data, all while forecasting future returns.

Imitation Strategy Organizations following an **imitation strategy** try to minimize risk and maximize opportunity for profit, moving new products or entering new markets only after innovators have proven their viability.[163] On a smaller scale, companies within the same industry share best practices and benchmarking data in order to advance the industry. More overt imitation strategies suggest organizations follow smaller and more innovative competitors with superior products but only after competitors have demonstrated that a market is there. Executives in these organizations assess the costs of imitation and the opportunity costs for moving late and may even outsource to copy quickly, even if the costs are prohibitive.[164]

imitation strategy A strategy that seeks to move into new products or new markets only after their viability has already been proven.

One modern example is how Instagram released its own version of "Stories," a feature nearly identical to the one Snapchat introduced: Since its release, Instagram added 250 million users.[165] Moreover, larger companies (especially those in the tech industry) will often move to acquire smaller companies that have "proved the concept," paving the way for moving the strategy forward with more capital and resources.[166]

However, the imitation strategy does have its drawbacks. As some examples indicate, imitation can be an extreme risk that causes firms to imitate the effects of success rather than its causes, imitation often ignores the luck and serendipity that caused the imitated to become successful, and imitation can lead to long-term decline if the imitating company does not have the capacity or resources to scale.[167] Interestingly, there appears to be an ethical component as well: Imitation can lead some companies today to get a "bad reputation" for partnering up with firms, learning from them, and then "stabbing them in the back" once they have developed their own version of the product or service.[168]

Structural Matches Exhibit 15-9 describes the structural option that best matches each strategy. Innovators need the flexibility of the organic structure (although, as we noted, they may use some elements of the mechanistic structure as well), whereas cost minimizers seek the efficiency and stability of the mechanistic structure. Imitators combine the two structures. They use a mechanistic

Exhibit 15-9 The Strategy–Structure Relationship

Strategy	Structural Option
Innovation	**Organic:** A loose structure; low specialization, low formalization, decentralized
Cost minimization	**Mechanistic:** Tight control; extensive work specialization, high formalization, high centralization
Imitation	**Mechanistic and organic:** Mix of loose with tight properties; tight controls over current activities and looser controls for new undertakings

structure to maintain tight controls and low costs in their current activities but create organic subunits in which to pursue new undertakings.

Organization Size

An organization's size significantly affects its structure.[169] Organizations that employ two thousand or more people tend to have more specialization, more departmentalization, more vertical levels, and more rules and regulations than do small organizations. However, size becomes less important as an organization expands. Why? At around two thousand employees, an organization is already mechanistic; five hundred more employees should not have much of an impact. But adding five hundred employees to an organization of only three hundred is likely to significantly shift it toward a more mechanistic structure.

Technology

technology The way in which an organization transfers its inputs into outputs.

Technology describes the way an organization transfers inputs into outputs.[170] Every organization has at least one technology for converting financial, human, and physical resources into products or services (think of the Ben & Jerry's example earlier in the chapter). Regardless, organizational structures adapt to their technology—and vice versa. Organizational structure and culture can become inscribed in the data structure, software, and hardware that an organization uses.[171] Moreover, as we described in depth in the chapter on communication, the advent of social media has changed the way that employees, leaders, executives, clients, customers, and the public at large communicate with one another. This form of technology has revolutionized how companies market to consumers, recruit talent, and create a digital presence in a technologically transformed world.

Environment

environment Forces outside an organization that potentially affect the organization's structure.

An organization's **environment** includes outside institutions or forces that can affect its structure, such as suppliers, customers, competitors, and public pressure groups.[172] Dynamic environments create significantly more uncertainty for managers than do static ones. To minimize uncertainty in key market arenas, managers may broaden their structure to sense and respond to threats. For example, most companies have added social media departments to find and respond to negative information (e.g., reviews) posted online.[173]

Any organization's environment has three dimensions: capacity, volatility, and complexity.[174] Let us discuss each separately.

Capacity *Capacity* refers to the degree that the environment can support growth. Rich and growing environments generate excess resources that can buffer the organization in times of relative scarcity. One example of how capacity plays a role in strategic decisions is how Amazon sought to build a second headquarters in a major U.S. city, considering several environmental factors (including capacity) in its decision.[175]

Volatility *Volatility* describes the degree of instability in the environment. A dynamic environment with a high degree of unpredictable change makes it difficult for management to make accurate predictions. Because information technology changes at such a rapid pace, most organizations' environments are becoming volatile. The characteristics of firms, their teams, and their leaders often affect how well firms weather the storms of volatility.[176] For example, research on top executives in China points to the Chinese concept of *negotiable fate* (i.e., the belief that personal actions can shape outcomes); when executives hold this belief, they tend to be more entrepreneurial in how they approach volatility, which in turn predicts their firms' innovation and financial performance.[177] Moreover, airlines

that choose strategic flexibility are more likely to succeed in unpredictable, turbulent environments than those that prioritize mechanistic efficiency.[178]

Complexity Finally, *complexity* is the degree of heterogeneity and concentration among environmental elements. Environments characterized by heterogeneity and dispersion are complex and diverse, with numerous competitors. For example, information security firms operate in an incredibly complex environment: Competitors are widely dispersed and different from one another, the way people interact with technology and the Internet is diverse, and adversaries (e.g., attackers, hackers, and cyber-criminals) also use several methods to complete their work.[179]

Three-Dimensional Model of the Environment Exhibit 15-10 summarizes our definition of the environment along its three dimensions. The arrows indicate movement toward higher uncertainty. Thus, organizations that operate in environments characterized as scarce, dynamic, and complex face the greatest degree of uncertainty because they have high unpredictability, little room for error, and a diverse set of elements in the environment to monitor constantly.

Given this three-dimensional definition of *environment*, we can offer some general conclusions about environmental uncertainty and structural arrangements. The more scarce, dynamic, and complex the environment, the more organic a structure should be. The more abundant, stable, and simple the environment, the more the mechanistic structure will be preferred.

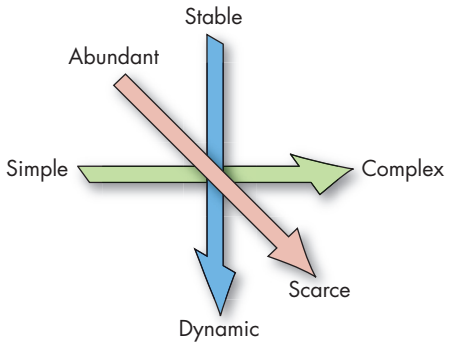
Institutions

Another factor that shapes organizational structure is **institutions**. These are cultural factors that act as guidelines for appropriate behavior.[180] Institutional theory describes some of the forces that lead many organizations to have similar structures and, unlike the theories we have described so far, focuses on pressures that are not necessarily adaptive. In fact, many institutional theorists try to highlight the ways in which corporate behaviors sometimes *seem* to be performance-oriented but are really guided by unquestioned social norms and conformity.

institutions Cultural factors, especially those factors that might not lead to adaptive consequences, that lead many organizations to have similar structures.

The most obvious institutional factors come from regulatory pressures; certain industries under government contracts, for instance, must have clear reporting relationships and strict information controls. Sometimes simple inertia determines an organizational form—companies can be structured in a particular way just because that is the way things have always been done or what others are doing.

Exhibit 15-10 Three-Dimensional Model of the Environment



Organizations in countries with high power distance might have a structural form with strict authority relationships because it is seen as more legitimate in that culture. Some have attributed problems in adaptability in Japanese organizations to the institutional pressure to maintain authority relationships.

Sometimes organizations start to have a particular structure because of fads or trends. Organizations can try to copy other successful companies just to look good to investors and not because they need that structure to perform better. Consider the "cola wars," for instance—so many of Coca-Cola's brands have direct Pepsi competitors (Diet Coke? Diet Pepsi. Coca-Cola Cherry? Pepsi Wild Cherry. Fanta? Slice. Sprite? Sierra Mist. Mello Yello? Mountain Dew, and so on). Institutional pressures are often difficult to see specifically because we take them for granted. They become a form of *bounded rationality* where the norms and routines become so entrenched that it is difficult to see the big picture and question the way things are done, which can result in stagnation and may ultimately lead to some organizations' downfall if they cannot adapt or if an innovating company disrupts their business model.

Organizational Designs and Employee Behavior

15-6 Analyze the behavioral implications of different organizational designs.

We opened this chapter by implying that an organization's structure can have significant effects on its members. What might those effects be? A review of the evidence leads to a pretty clear conclusion:[181] You cannot generalize! Not everyone prefers the freedom and flexibility of organic structures. Several factors stand out in different structures as well. In highly formalized, heavily structured mechanistic organizations, the level of fairness in formal policies and procedures (organizational justice) is a very important predictor of satisfaction. In more personal, individually adaptive organic organizations, employees value interpersonal justice more.[182] Some people are most productive and satisfied when work tasks are standardized and ambiguity is minimized—that is, in mechanistic structures. So any discussion of the effect of organizational design on employee behavior should address individual differences. To do so, let us consider employee preferences for work specialization, span of control, and centralization.[183]

Span of Control

It is probably safe to say that no evidence supports a relationship between *span of control* and employee satisfaction or performance. Although it is intuitively attractive that large spans might lead to higher employee performance because they provide more distant supervision and more opportunity for personal initiative, there is a lack of research to support this notion.[184] Some people like to be left alone; others prefer the security of a supervisor who is always quickly available. Consistent with several of the contingency theories of leadership (see the chapter on leadership), we would expect factors such as employees' experiences and abilities and the degree of structure in their tasks to explain when wide or narrow spans of control are likely to contribute to performance and job satisfaction. However, some evidence indicates that large spans of control are related to more unsafe behaviors and accidents in the workplace.[185]

Centralization

We also find evidence linking *centralization* and job satisfaction.[186] In general, less centralized organizations have a greater amount of autonomy. But, again, while one employee may value freedom, another may find autonomous environments frustratingly ambiguous.

Predictability Versus Autonomy

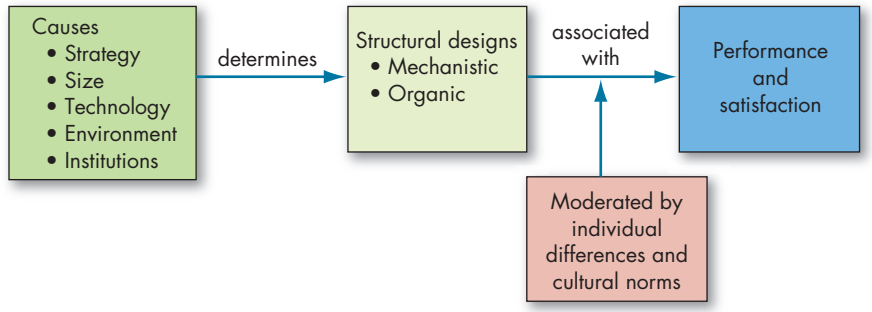
We can draw one obvious insight: People do not select employers randomly. They are attracted to, are selected by, and stay with organizations that suit their personal characteristics.[187] Job candidates who prefer predictability are likely to seek out and take employment in mechanistic structures, and those who want autonomy are more likely to end up in organic structures. Thus, the effect of structure on employee behavior is undoubtedly reduced when the selection process facilitates proper matching of individual characteristics with organizational characteristics. Companies should strive to establish, promote, and maintain the unique identity of their structures because skilled employees may quit because of dramatic changes.[188]

National Culture

Research suggests that national culture influences the preference for structure.[189] Organizations that operate with people from high-power-distance cultures, such as Greece, France, and most of Latin America, often find their employees are much more accepting of mechanistic structures than are employees from low-power-distance countries. So consider cultural differences along with individual differences when predicting how structure will affect employee performance and satisfaction. The changing landscape of organizational structure designs has implications for the individual progressing on a career path. Research with managers in Japan, the United Kingdom, and the United States indicated that employees who weathered downsizing and resulting hybrid organizational structures considered their future career prospects diminished. While this may or may not have been correct, their thinking shows that organizational structure does affect the employee and thus must be designed carefully across cultures.

The theme of this chapter is that an organization's internal structure contributes to explaining and predicting behavior. That is, in addition to individual and group factors, the structural relationships in which people work have a bearing on employee attitudes and behavior. What is the basis for this argument? To the degree that an organization's structure reduces ambiguity for employees and answers questions such as "What am I supposed to do?," "How am I supposed to do it?," "To whom do I report?," and "To whom do I go if I have a problem?," it shapes their attitudes and facilitates and motivates them to higher levels of performance. Exhibit 15-11 summarizes what we have discussed.

Exhibit 15-11 **Organizational Structure: Its Determinants and Outcomes**



Summary

Organizational structure affects how people communicate with one another and how members of the organization execute the organization's strategy and mission. In this chapter, we discussed several characteristics of organizational structure that influence communication, power dynamics, and the work to be completed. Moreover, we discussed several different organizational structures, from the traditional, simple structure to the more modern team structure. Notably, these structures tend to vary in the degree that they are organic or mechanistic. Next, we discussed various strategies organizations employ to advance their mission. First, we discussed downsizing and lean management as a way organizations cut costs and stay focused on their goals. However, most modern research suggests that downsizing may negatively impact employee attitudes and performance despite its short-term benefits for financial performance. Other organizations adopt strategies that are aligned with their mission, including innovation, cost minimization, and imitation. We close by discussing external characteristics that affect organizational structure and strategy, including the organization's size, technology, the environment, and institutional pressures.

Implications for Managers

- Structure follows strategy. Work backward from your organization's strategy and mission to determine the appropriate structure.
- Consider the key elements of organizations (e.g., departmentalization, specialization) when determining the appropriate structure. Some elements (e.g., chain of command, span of control, [de]centralization, boundary spanning) have unique implications for how employees and managers interact with one another.
- Many traditional structures are still used today (e.g., simple, bureaucracy, matrix). Moreover, many modern structures are heavily informed by these structures or use elements of these as micro-structures for particular divisions, departments, or units.
- If there are many cost-prohibitive functions that your organization must implement that would be difficult to perform in-house, consider a virtual structure.
- Many modern organizations today have shifted to an organic team structure, which allows for greater flexibility and empowers teams to realize the organization's mission. However, even mechanistic bureaucracies have their place if the goal is entirely standardized functions and outputs. It is important not to get swept up in trends and instead focus on the mission, strategy, and environment and structure the organization accordingly.
- Although sometimes downsizing is necessary and can lead to short-term cost reductions, weigh the decision to downsize wisely, as it can negatively affect the employees and morale.
- Depending on your organization's mission, innovation, cost-minimization, or imitation strategies (among others) could be adopted. However, realize that strategy often changes as a function of environmental pressures or opportunities. Flexible organizational structures enable flexible adaptation. This becomes more difficult the larger and more institutionalized organizations become.

Open-Air Offices Inspire Creativity and Enhance Productivity

POINT

Eric Prum, cofounder of W&P Design in Brooklyn, New York, and his twelve coworkers share a single room on the fourth floor of an open-air, converted warehouse. Although it can occasionally be noisy, the layout has led to some very productive brainstorming sessions. In fact, their latest project, ¡Buenos Nachos!, was a direct result of the open-air office plan. The cofounders were discussing the idea for a hipster nacho cookbook in the office while the coworkers eavesdropped. What turned into a spontaneous idea quickly became a productive brainstorming session. From this open-air plan emerged a cookbook with over 75 recipes from famous chefs and celebrities, including Bill Hader, Andrew Zimmern, and Rachael Ray.

Aside from cost minimization, the logic of the open-air office is that it is meant to tear down the physical barriers between people in the workplace. The functional communication among employees is maximized when these barriers are removed. Starting with the organization's functional goals in mind, an open-air workplace can be tailored so that it accomplishes these goals by setting aside certain areas or spaces so that they are well suited to accomplish specific functions (e.g., a meeting area, a reading area, etc.). For example, the New York branding firm Collins altered aspects of the environment to work around any limitations of an open-air office, including arranging the tables so that no person faces another employee. Overall, Collins found, in its own internal research, that the open-air office improves a sense of shared vision and mission, community, and creativity perceptions. Additional research also suggests that these open-air plans can reduce the amount of time spent in meetings.

COUNTERPOINT

Our new, modern Tribeca office was beautifully airy, and yet remarkably oppressive. Nothing was private. On the first day, I took my seat at the table assigned to our creative department, next to a nice woman who I suspect was an air horn in a former life. All day, there was constant shuffling, yelling, and laughing, along with loud music piped through a PA system." The picture Lindsey Kaufman, a Brooklyn advertising professional, described highlights the strain and dissatisfaction employees in open-air office environments can experience, even when there are cubicles granting at least some privacy. The creator of the cubicle, Robert Probst, envisioned something very different in 1964: a free space where employees could customize their workplace to accommodate their level of privacy, space needs, and flexibility to give them a sense of autonomy in an open office. This "action office" became mass-produced and limited in size, quality, and customizability, leading to what we would now call the modern-day cubicle.

Studies on the open-air office and the confinement cubicles of modern offices paint a dismal picture of their effectiveness. One study reviewing hundreds of office environments found that, despite their cohesion benefits, open-air offices reduced workers' attention spans, productivity, creative thinking, and satisfaction. One of the biggest factors responsible is the level of noise, which leads to decreased motivation and potential posture issues. The satisfaction levels related to noise, sound privacy, and ease of interaction, among others, across 42,764 observations from over three hundred office buildings were analyzed by researchers using the Post-Occupancy Evaluation (POE) database from the University of California at Berkeley. They found a clear disparity between satisfaction in open offices versus private offices and drastically more satisfaction with the latter. And they found that ease of interaction (a goal of open-office plans) was no greater in open offices than in private offices.[190]

CHAPTER REVIEW

QUESTIONS FOR REVIEW

15-1 What key elements define an organization's structure?

15-2 What are the characteristics of the simple, bureaucracy, and matrix structures?

15-3 What are the characteristics of the virtual structure, the team structure, and the circular structure?

15-4 How might downsizing affect organizational structures and employees?

15-5 How are mechanistic and organic structural models similar and different?

15-6 What are the behavioral implications of different organizational designs?

APPLICATION AND EMPLOYABILITY

Knowing the ins and outs of the structure of your organization can help you improve your employability in the future. You can improve how you make strategic and ethical decisions, along with how you collaborate and communicate with others in the workplace. Different forms of organizational structure have various consequences for employee, manager, and customer behaviors; recognizing these effects can help you behave more adaptively. Perhaps someday, you will be starting your own organization from the ground up, or you may collaborate to restructure or redesign the work in an organization. Understanding these different forms of structure will help you improve your skills for use in those situations.

In this chapter, you improved your leadership and collaboration skills by critically evaluating the bureaucracy structure's effects on innovation and productivity, examining the ethical impact of deskless workplaces, demonstrating how socially responsible companies can adopt innovation strategies, and debating the utility of open-air offices. In the next section, you will develop these skills, along with your critical thinking and creativity, by designing a remote work–friendly organizational structure, debating how to approach downsizing ethically, and considering the case of United Airlines along with the impact its organizational structure had on organizational outcomes.

EXPERIENTIAL EXERCISE Remote Work

Create groups of four and read the following background information:

As the executive team at an organization, you have decided to provide employees with the option to work remotely. However, as a team, you need to reach a consensus about the structures and systems needed for remote work to be successful.

- What will the remote work policy look like? For example, will employees be given the option to work remotely full-time, primarily, or hybrid? Will all employees, regardless of experience or length of employment, be allowed to work remotely? Can teams work together that are composed of both remote and on-site employees?
- What type of training will need to be offered to prepare employees for remote work?
- Which human resource policies will need to be updated? For example, will changes need to be made to existing policies concerning compensation decisions, benefit programs, or recruiting strategies?

After completing the exercise, answer the following questions.

Questions

15-7. Did you encounter any challenges as you tried to reach a consensus about what structures and systems needed to be in place to make remote work successful? Explain.

15-8. Are there any other systems and structures that you believe need to be in place before implementing a remote work policy? Explain.

ETHICAL DILEMMA The Ethics of Layoffs

The executives at the electronics company Catron are faced with a difficult decision. The organization has weathered consistently poor performance as of late. As a result, the executives believe that they must significantly downsize. During a meeting of senior executives, they discuss the best way to handle the situation. The executives agree that the most logical way of deciding who will be let go is to use position and tenure as the main criteria. One executive remarked, "Last hired, first fired makes the most sense, is the fairest, and ultimately will be the most efficient."

However, one executive, Blair, speaks up and asks, "Shouldn't we consider other factors, like diversity, when making these decisions? Relying only on position and tenure might not result in the best decisions." The other executives respond that downsizing is not about gender or race. Instead, it is about cutting off the least embedded parts of the organizational chart. Terminating a poorly performing manager who is essential to the culture and has worked for the company for over thirty years would be disastrous for morale. Moreover, terminating someone who plays a key leadership role would harm the coordination of our teams and business processes.

Blair points out that this method of laying off employees and managers could disproportionately affect members of the organization from underrepresented groups. They are more likely to hold the positions that they are considering cutting. Only in recent years has Catron implemented a successful DEI initiative, resulting in the hiring of members from underrepresented groups. Blair says that they should develop another approach to carry out these layoffs that will not have potentially detrimental

consequences. Blair suggests adopting a more individualized approach and using performance evaluations to assess which individuals will need to be fired.

One executive chimes in, "You mean 'rank and yank'? That never goes over well… And I thought that could also cause disparate impact toward our underrepresented groups?" Blair responds, "No, I do not mean we should rank all of the employees and managers based on performance and cut everyone below a certain benchmark. I just think we need to think about their performance and consider laying off those whose performance is having a detrimental effect on our organizational output and teamwork."

Despite Blair earnestly trying to persuade the other executives, they ultimately decide that the original approach will be the least time-consuming.

Questions

15-9. Which approach do you believe is best? Explain.

15-10. Are there other strategies that organizations could employ to ensure that underrepresented employees and managers are not disproportionately affected by the layoffs?

15-11. Besides layoffs, what other options might the executives have tried to reduce costs?[191]

CASE INCIDENT *Kuuki*: Reading the Atmosphere

Most Japanese businesses have very complex vertically structured organizations. Indeed, each of the key departments of an organization has its own vertical structure and operates rather like individual businesses. There is very little interrelationship between departments, each of which has very clearly defined roles.

When the business interacts with customers, it is the sales and marketing departments that handle negotiations. Even when the customer needs technical information and support, sales and marketing are often involved as an intermediary between the company's engineers and the customer. It is common for sales specialists to take on the role of negotiators on behalf of the manufacturing department or research and development. Interdepartmental communications are infrequent.

One of the problems with this situation is that salespeople rarely have technical expertise. The majority of salespeople would not have studied science and technology and are more likely to be qualified in the arts; they are chosen for the sales role due to their social skills. The common perception is that engineers and technical specialists are not as sociable and are therefore not good sellers.

Japanese companies have relied on other ways to make up for this. In their offices, larger Japanese companies tend to have open-plan spaces. This allows the departmental head to learn what other people do and to ensure that they share information. In smaller Japanese businesses, it is common for the business owner to also be situated in an open-plan environment.

The key to success is "reading the air," or reading the *kuuki*. Being alert to what is being said and what is being done means that Japanese managers have instant access to up-to-date information—they know what individual employees know. Individuals in a department are comfortable with this situation; informal information sharing is seen as an effective and vital process.[192]

Questions

15-12. Complex vertical organizational structures are very hierarchical in nature. They are very rigid, with each department having clearly defined roles. Is such an organization capable of being agile and responsive, or is it a disadvantage?

15-13. What are the problems with such strictly defined roles?

15-14. Is reading the air just eavesdropping and spying on others? Would most employees be comfortable with this situation?

16 Organizational Culture and Change



Source: Humphery/Shutterstock

LEARNING OBJECTIVES

After studying this chapter, you should be able to:

16-1 Describe the common characteristics of organizational culture.

16-2 Show how culture is transmitted to employees.

16-3 Identify the factors that create and sustain an organization's culture.

16-4 Compare the functional and dysfunctional effects of organizational culture on people and the organization.

16-5 Describe the similarities and differences in creating positive, ethical, and innovative cultures.

16-6 Discuss how change operates both within and outside organizations.

16-7 Compare the four main approaches to managing organizational change.

Employability Skills Matrix (ESM)

	Myth or Science?	An Ethical Choice	Point/ Counterpoint	Toward a Better World	Experiential Exercise	Ethical Dilemma	Case Incident
Critical Thinking & Creativity	✓	✓	✓	✓	✓	✓	✓
Communication					✓		
Collaboration	✓		✓		✓	✓	
Self-Management				✓	✓		
Social Responsibility		✓	✓	✓		✓	✓
Leadership	✓	✓	✓			✓	✓
Career Management					✓	✓	✓

THE WOLF CULTURE

The tech giant Huawei has rapidly expanded, bringing mobile phone and data service to areas worldwide. The company's success is often attributed to its so-called "wolf culture." Huawei's culture is rooted in the background of its founder, Ren Zhengfei, who was an engineer in the People's Liberation Army for nearly a decade. He founded the company in the late 1980s during the time of China's capitalist revival. Since the company's founding, military values, including drive, dedication, and persistence, have influenced the organization's culture. The company speaks with pride about the early years of Huawei, during which employees endured tough working conditions to ensure the organization's success. For instance, employees were given mattresses to take naps as they often worked late nights.

Huawei's history continues to influence the culture today as employees still work long hours. New employees are also required to participate in a boot camp–style training course. Some employees have characterized this training course as "brainwashing." New hires are directed to wear red-and-white Huawei uniforms and take classes about the company's history, products, and corporate culture. Although employees admit that working at Huawei is very difficult—some even describe it as "painful"—they admit that without this type of culture, Huawei could not have achieved its success today.

Other Chinese companies like Alibaba and Xiaomi are known for having demanding hours. Yet Huawei seems to take it a step further.

Employees even sign a pledge of loyalty that states they willingly give up their vacation leave and overtime pay. Some may wonder how Huawei can retain employees long-term with this type of organizational culture. The company's shareholding system appears to be key. Huawei is not a public company but instead is owned by employees. However, only those who perform well enough qualify to hold company shares. By sharing both the responsibilities and benefits, Huawei can maintain a strong collectivist culture. Employees are willing to make personal sacrifices if it benefits the organization.

However, the culture that was once celebrated as the key to Huawei's success has now come under greater scrutiny. Evidence of widespread misconduct has surfaced. It appears that the "wolf culture" allowed or even encouraged employees to bend the rules to achieve success by whatever means, no matter how unethical. Workers have been accused of serious allegations from bribing government officials to do business in Africa to copying an American company's source code. In 2015, the CEO revealed that thousands of employees had confessed to violations ranging from fraudulent reporting of financial information to bribery. While Huawei reports that all employees are required to study and sign guidelines regarding business conduct each year (including compliance with local laws and regulations), Zhengfei has admitted that many workers do not pay attention to the internal rules and controls. This lack of attention may be because Huawei staff are evaluated primarily based on how much business they contribute to the organization. Furthermore, the CEO has expressed that he believes ethical standards should be enforced so long as they do not interfere with the success of the organization's business.

Huawei is now the world's largest telecommunications equipment manufacturer and the second-largest producer of smartphones. However, its fate remains uncertain as Zhengfei's daughter, Meng Wanzhou, the chief financial officer, was charged with fraud. The story of Huawei demonstrates the risks that come with an organizational culture that does not enforce ethical standards and neglects employee well-being.[1]

Organizations have values, beliefs, assumptions, and norms that govern how members behave. We call these expectations the *organizational culture*. Every organization has a culture that, depending on its strength, can have a considerable influence on the attitudes and behaviors of organization members, even if that effect is hard to measure precisely. In this chapter, we will discuss what organizational culture is, how it affects employee attitudes and behavior, where it comes from, and whether it can be changed.

What Is Organizational Culture?

16-1 Describe the common characteristics of organizational culture.

Would you spend $10,000 on a guitar without even playing it? Customers of Chicago-based Reverb.com, an online musical instrument marketplace, are willing to do so. Why do they keep coming back rather than going to competitors such as eBay? The answer may be found in its organizational culture. We have all felt an indescribable essence about the organizations we have experienced. This pervasive atmosphere can have a strong and measurable impact on behavior. Reverb.com has created an organization and a brand, founded on a passion for music and a drive to create a wonderful customer experience for musicians. Employees and customers alike share values, beliefs, and traditions centered around music and its performance.[2]

As you will see in this chapter, organizational culture can have a profound effect on organizational effectiveness. Notably, 88 percent of millennials surveyed by Gallup (a polling company) stated that they would remain in their jobs *for more than five years* if they were satisfied with the company's purpose, or mission.[3]

And when culture becomes "toxic" it is very hard to change.[4] It is not as easy as changing the organization's executives either.[5] For instance, many of Boeing's CEOs are positioned to take on its cost-cutting culture but end up meeting the same fate as prior CEOs who have failed to realize the change.[6] As Larry Light, CEO of Arcature, notes: "CEO changes without culture change do not produce the outcomes stakeholders would like. In fact, in many cases, changing management without changing the culture is tantamount to merely rearranging the deck chairs on a slowly sinking cruise ship."[7]

A Definition of Organizational Culture

Organizational culture refers to a system of shared meaning held by members that distinguishes the organization from other organizations.[8] This system of shared meaning includes values, beliefs, and assumptions that characterize the organization.[9] These values, beliefs, and assumptions, when put into practice, (1) filter what employees pay attention to, (2) are physically manifested as *material symbols* (for example, uniforms, statues, etc.) and *stories*, and (3) form the foundation for shared meaning among members of an organization.[10]

organizational culture A system of shared meaning held by an organization's members that distinguishes the organization from others. This system is characterized by values, beliefs, and underlying assumptions.

Organizational culture shows how employees perceive the essence of an organization, not whether they like them—that is, it is a *descriptive* term. Research on organizational culture has sought to measure how employees see their organization: Does it encourage teamwork? Does it reward innovation? Does it stifle initiative? In contrast, job satisfaction is an *evaluative* term: It seeks to measure how employees feel about the organization's expectations, reward practices, and the like. See Exhibit 16-1 for a contrast of two companies with very different organizational cultures.

Organizational cultures are extremely difficult to define and characterize, and over the years many people sought to understand the meaning of culture in organizations.[11] Many have asked, do organizations *have* cultures? These researchers have tried to figure out what makes cultures different from one another. Still others have asked, what *are* organization's cultures? These researchers are more concerned with describing specific cultures and understanding what makes one particular organization tick. As an example, followers of the *have* perspective might try to figure out what values and beliefs descriptively separate Reverb.com from, say, eBay. On the other hand, followers of the *are* perspective would only try to understand what Reverb.com is, for what it is: by studying the stories, rituals, material symbols, and language used at Reverb.

Exhibit 16-1 Contrasting Organizational Cultures

Organization A

This organization is a manufacturing firm. Managers are expected to fully document all decisions, and "good managers" are those who can provide detailed data to support their recommendations. Creative decisions that incur significant change or risk are not encouraged. Because managers of failed projects are openly criticized and penalized, managers try not to implement ideas that deviate much from the status quo. One lower-level manager quoted an often-used phrase in the company: "If it ain't broke, don't fix it."

There are extensive rules and regulations in this firm that employees are required to follow. Managers supervise employees closely to ensure there are no deviations. Management is concerned with high productivity, regardless of the impact on employee morale or turnover.

Work activities are designed around individuals. There are distinct departments and lines of authority, and employees are expected to minimize formal contact with other employees outside their functional area or line of command. Performance evaluations and rewards emphasize individual effort, although seniority tends to be the primary factor in the determination of pay raises and promotions.

Organization B

This organization is also a manufacturing firm. Here, however, management encourages and rewards risk taking and change. Decisions based on intuition are valued as much as those that are well rationalized. Management prides itself on its history of experimenting with new technologies and its success in regularly introducing innovative products. Managers or employees who have a good idea are encouraged to "run with it." And failures are treated as "learning experiences." The company prides itself on being market driven and rapidly responsive to the changing needs of its customers.

There are few rules and regulations for employees to follow, and supervision is loose because management believes that its employees are hardworking and trustworthy. Management is concerned with high productivity but believes that this comes through treating its people right. The company is proud of its reputation as being a good place to work.

Job activities are designed around work teams, and team members are encouraged to interact with people across functions and authority levels. Employees talk positively about the competition between teams. Individuals and teams have goals, and bonuses are based on achievement of these outcomes. Employees are given considerable autonomy in choosing the means by which the goals are attained.

com. These latter forms (described later in the next section) are notoriously hard to measure and interpret. Although sometimes observable by outsiders, they tap into deep underlying assumptions that are sometimes only capable of being fully grasped and experienced by an "insider."[12]

Regardless of the many ways of conceptualizing varying "types" of culture by values or beliefs, one of the most common frameworks describes organizational cultures as possessing several competing values.[13]

1. **"The Clan."** A culture based on human affiliation. Employees value attachment, collaboration, trust, and support.
2. **"The Adhocracy."** A culture based on change. Employees value growth, variety, attention to detail, stimulation, and autonomy.
3. **"The Market."** A culture based on achievement. Employees value communication, competence, and competition.
4. **"The Hierarchy."** A culture based on stability. Employees value communication, formalization, and routine.

The differences between these cultures are reflected in their internal versus external focus and their flexibility and stability.[14] For instance, clans are internally focused and flexible, adhocracies are externally focused and flexible,

Exhibit 16-2 The Effect of Culture on Organizational Outcomes

Culture	Attitudes & Performance	Innovation	Quality & Efficiency	Customer Satisfaction	Profitability & Revenue Growth
Clan	+*	+*	0	+*	-
Adhocracy	+*	+	+*	-	0
Market	0	+	+*	+*	0
Hierarchy	+*	-	+*	0	+*

Note: + corresponds with a positive effect on the outcome, - corresponds with a negative effect on the outcome, 0 corresponds with no effect on the outcome, * suggests the culture is strongly related to the outcome.

Source: Based on findings from C. A. Hartnell, A. Y. Ou, A. J. Kinicki, D. Choi, and E. P Karam, "A Meta-Analytic Test of Organizational Culture's Association With Elements of an Organization's System and Its Relative Predictive Validity on Organizational Outcomes," *Journal of Applied Psychology* 104, no. 6 (2019): 832–50.

markets are externally focused and stable, and hierarchies are internally focused and stable. Reviews of hundreds of studies have helped summarize the findings on the cultures from the competing values framework.[15] As shown in Exhibit 16-2, the various cultures differ regarding how they influence organizational outcomes. Although we note that many of these outcomes are also heavily influenced by leadership and organizational structure (see their respective chapters for more information), culture adds more to the picture than leadership or structure. A strategic approach to culture would suggest that cultures would ideally match one's objectives.[16] Although most cultures have a positive effect on employee attitudes, performance, innovation, product/service quality, and operational efficiency, it is clear that a clan or market culture is perhaps best aligned with customer-oriented outcomes and that a hierarchical culture is best for profitability and revenue growth.[17]

Although the competing values approach is one of the most frequently studied ways of examining organizational culture, other frameworks have been introduced. For example, the *Organizational Culture Inventory* groups cultures into three categories: (1) *constructive cultures* that value affiliation, encouragement, and achievement; (2) *passive-defensive cultures* that avoid accountability, seek validation and approval from others, and are conventional; and (3) *aggressive-defensive cultures* that are competitive, perfectionist, and power-oriented.[18] Another widely used framework is the *Organizational Culture Profile* (OCP).[19] The OCP draws upon a novel survey method in which employees sort a set of values based on how closely they represent their organization. The OCP suggests an organizational culture can be described by eight dimensions: (1) *innovation*, (2) *attention to detail*, (3) *decisiveness*, (4) *team-orientation*, (5) *outcome-orientation*, (6) *aggressiveness*, (7) *supportiveness*, and (8) *rewards-emphasis*.

Do Organizations Have Uniform Cultures?

Organizational culture represents a perception that the organization's members hold in common. Statements about organizational culture are valid only if individuals with different backgrounds or at different levels in the organization describe the culture in similar terms.[20]

The **dominant culture** expresses the **core values** most members share and that give the organization its distinct personality.[21] **Subcultures** tend to develop in large organizations in response to common problems or experiences that a group of members face in the same department or location.[22] Most large organizations have a dominant culture and numerous subcultures.[23] Sometimes the

dominant culture A culture that expresses the core values that are shared by most of the organization's members.

core values The primary or dominant values that are accepted throughout the organization.

subcultures Minicultures within an organization, typically defined by department designations or geographical separation.

subcultures can be so strong, however, that they subtly reject the "official" culture and do not conform.[24] If organizations were composed only of subcultures, the dominant organizational culture would be significantly less powerful. It is the "shared meaning" aspect of culture (in both dominant and subcultures) that makes it a potent device for guiding and shaping behavior. Subcultures have even been detected at the country or nation level, forming because of immigration, assimilation of new immigrants, or class differences among the people.[25]

Strong Versus Weak Cultures

It is possible to differentiate between strong and weak cultures.[26] If most employees have the same opinions about the organization's mission and values, the culture is strong; if opinions vary widely, the culture is weak.

strong culture A culture in which the core values are intensely held and widely shared.

In a **strong culture**, the organization's core values are both intensely held and widely shared.[27] The more members who accept the core values and the greater their commitment, the stronger the culture and the greater its influence on member behavior. David Rodriguez, executive vice president and chief human resources officer at Marriott hotels, emphasizes that it really is the people who forge a strong culture: "If you don't have the courage and wisdom to release control of the culture to your associates and employees, it won't work." Instead, Marriott enlists the help of over 15,000 volunteer employees to champion the company's culture.[28]

A strong culture should more directly affect organizational outcomes because it demonstrates high agreement about what the organization represents. Such unanimity of purpose builds cohesiveness, loyalty, meaning, and organizational

Myth or Science?

An Organization's Culture Is Forever

This statement is not true. Although organizational culture is difficult to change and a notable change can take a long time, it can be done. Sometimes it is essential for survival. For years, Wisconsin's Wellspring system provided nursing homes where inpatients had little input about their care. The organizational culture allowed lax standards to prevail. Then the network of eleven nursing homes launched a culture change initiative. Management focused on caregiver collaboration, education, accountability, and empowerment. The results were excellent: Wellspring realized fewer state standards infractions and higher employee retention rates at the facilities. The results for the patients were even greater: fewer bedridden residents, less use of restraints and psychoactive medication, less incontinence, and fewer tube feedings than in other nursing homes.

The Wellspring program illustrates the significant effect that positive organizational culture change can achieve. CEO Bob Flexon of Dynegy Inc., a Houston-based electric utility giant that emerged from bankruptcy, saved his company by changing the organizational culture. First, he ditched the cushy CEO office suite, $15,000 marble desk, and Oriental rugs for a small cubicle on a warehouse-style floor shared with all 235 headquarters employees. Next, he visited company facilities, trained "culture champions," reinstated annual performance reviews, and increased employee collaboration. He created a plaque as a reminder to "Be Here Now" instead of multitasking and banned smartphones from meetings. Flexon said, "The idea was to instill a winning spirit," and he counts on his visibility as CEO to broadcast the culture change down to the lowest levels of the widespread organization.

Positive results at Dynegy have included a reduction in turnover from 8 percent in 2011 to 5.8 percent in the turnaround of 2012. Flexon said, "People are cautiously beginning to believe that we can win again." The company continued to report massive earnings losses, but Flexon is optimistic about Dynegy's rebound. He says, "Our ongoing focus on culture is what will make the difference." Through substantial growth and multiple acquisitions following its bankruptcy, Dynegy made around $5.5 billion in its last year of operation (2017) before being acquired by Vistra Energy in 2018.[29]

commitment. These qualities, in turn, lessen employees' propensity to leave. A study of nearly ninety thousand employees from 137 organizations found that culture strength or consistency was related to numerous financial outcomes when there was a strong sense of mission and high employee involvement. [30] A strong culture has enabled companies like Ace Hardware to thrive in an extremely competitive market, a market in which many other companies have folded or declared bankruptcy.[31]

How Employees Learn Culture

16-2 Show how culture is transmitted to employees.

Culture is transmitted in several forms, the most potent being stories, rituals, material symbols, and language.

Stories

When Henry Ford II was chair of Ford Motor Company, you would have been hard-pressed to find a manager who had not heard how he reminded his executives, when they got too arrogant, "It's my name that's on the building." The message was clear: Henry Ford II ran the company. As another example, several senior Nike executives spend much of their time serving as corporate storytellers.[32] When they tell how cofounder (and Oregon track coach) Bill Bowerman went to his workshop and poured rubber into a waffle iron to create a better running shoe, they are talking about Nike's spirit of innovation. The elderly man running in their first commercial in 1988 marks the first use of their slogan "just do it" and continues the story that anyone, despite their differences, can strive for and achieve their athletic goals.[33]

Stories such as these circulate through many organizations, anchoring the present in the past and legitimizing current practices.[34] They typically include narratives about the organization's founders, rule breaking, rags-to-riches successes, workforce reductions, relocations of employees, reactions to past mistakes, and organizational coping.[35] Employees also create their own narratives about how they came either to fit or not to fit with the organization during the process of socialization, including first days on the job, early interactions with others, and first impressions of organizational life.[36] Evidence suggests that these emotionally charged, often inspirational stories are incredibly transformational, persuasive, and motivational[37]—driving employees to adopt and perpetuate the culture.

Rituals

Rituals are repetitive sequences of activities that express and reinforce the key values of the organization—what goals are most important and/or which people are important versus which are expendable.[38] Some companies have nontraditional rituals to help support the values of their cultures. Kimpton Hotels & Restaurants, one of *Fortune*'s 100 Best Companies to Work For (for more than a decade), maintains its customer-oriented culture with traditions like a Housekeeping Olympics that includes blindfolded bedmaking and vacuum races.[39] Some companies have also been using rituals to "convert" potential customers, clients, and investors. For example, Ontario cool climate wineries have been using rituals in order to inspire and rouse emotional experiences among wine enthusiasts to identify with the winery and their product.[40] Why do rituals work in reinforcing values and placating supervisors, employees, and customers alike? Recent research suggests that rituals work because they inspire a sense of control in their participants and, as a result, reduce anxiety.[41]

rituals Repetitive sequences of activities that express and reinforce the key values of the organization, which goals are most important, which people are important, and which are expendable.

Symbols

material symbols Physical objects, or artifacts, that symbolize values, beliefs, or assumptions inherent in the organization's culture.

The layout of corporate headquarters, the types of automobiles top executives are given, and the presence or absence of corporate aircraft are a few examples of **material symbols**, sometimes also known as artifacts.[42] Others include the size of offices; the elegance of furnishings, perks, and attire; and even the organization's corporate social media page or website.[43] These convey to employees who is important; the degree of egalitarianism top management desires; and the kinds of behavior that are appropriate, such as risk taking, and conservative, authoritarian, participative, individualistic, or social behavior. Material symbols also offer a sense of connection and stir emotions in employees who make sense of the symbols.[44]

At some firms, like Chicago clothing company Threadless, an "anything goes" atmosphere helps emphasize a creative culture. Threadless meetings are held in an Airstream camper parked inside the company's converted FedEx warehouse, while employees in shorts and flip-flops work in bullpens featuring disco balls and garish decorations chosen by each team.[45] As another example, the Palo Alto office of IDEO has a "play lab" littered with toys and knickknacks as well as an airplane wing sticking out of one of the walls in the building—both of which may symbolize IDEO's playful experimentation and free expression values.[46]

Some cultures are known for the perks in their environments, such as Google's bocce courts, software designer Autodesk's bring-your-dog-to-work days, SAS's solar panel field, Microsoft's treehouse meeting spaces, and adventure-gear specialist REI's free equipment rentals. Other companies communicate the values of their cultures through the gift of time to think creatively, either with leaders or offsite. For instance, Biotech leader Genentech and many other top companies provide paid sabbaticals. Genentech offers every employee six weeks' paid leave for every six years of service to support a culture of equitability and innovative thinking.[47]

Language

Many organizations and subunits within them use language to help members identify with the culture, attest to their acceptance of it, and help preserve it.[48] Unique terms describe equipment, officers, key individuals, suppliers,



Baidu, a Chinese Web services firm, describes its culture as "simple"—meaning direct, open, and uncomplicated—and "reliable"—meaning trusting the competence of colleagues. Baidu's casual workplaces reflect this trust with lounges, gyms, yoga studios, and dome-shaped nap rooms employees may use at any time.

Source: Lou Linwei/Alamy Stock Photo

An Ethical Choice

A Culture of Compassion

In the world of banking, success and ethical culture do not necessarily go hand in hand. Leaders who desire ethical cultures in their organizations must choose to build ethics into the company's definition of success in ways that translate into ethical actions for managers and employees. Contrast two financial success stories, Goldman Sachs and JP Morgan Chase & Company. Both megabanks are among the Fortune 100 (the largest U.S. companies ranked by revenue). They are also two of *Fortune*'s World's Most Admired Companies. This list ranks the largest companies in revenue by nine criteria, including social responsibility. Yet their organizational cultures appear to be vastly different. Goldman Sachs seems to struggle to achieve an ethical culture for its employees and clients. In contrast, JPMorgan Chase seems to emanate a culture of compassion. Consider some headlines:

- *Goldman Sachs Agrees to Pay More Than $2.9 Billion to Resolve Probes Into Its 1MDB Scandal.* "Goldman Sachs today accepted responsibility for its role in a conspiracy to bribe high-ranking foreign officials to obtain lucrative underwriting and other business relating to 1MDB," attorney general Brian C. Rabbit stated. A pair of employees at the company helped a corrupt Malaysian financier funnel billions of dollars from a development fund that was supposed to build the country's economy. Instead, the money funded a multimillion-dollar yacht, multiple luxury properties worldwide, and a stake in the Scorsese film *The Wolf of Wall Street*.
- *JPMorgan Chase to Spend $30 Billion to Close the Racial Wealth Gap.* "Systemic racism is a tragic part of America's history. We can do more and do better to break down systems that have propagated racism and widespread economic inequality, especially for Black and Latinx people. It's long past time that society addresses racial inequities in a more tangible, meaningful way." The money JPMorgan Chase is committing to the initiative will go toward many different aims, such as financing forty thousand mortgages totaling $8 billion, committing $4 billion to help twenty thousand Black and Latinx homeowners refinance their homes, and $2 billion worth of assistance to Black and Latinx-owned businesses.

Organizational culture is where leaders' ethical choices demonstrate their expectations for others' decisions throughout the company. These examples suggest that the two cultures may subtly encourage ethical and unethical behavior in different ways.[49]

customers, or products related to the business. New employees may be overwhelmed at first by acronyms and jargon that, once assimilated, act as a common denominator to unite members of a given culture or subculture. As an idea of how expansive the terminology used in the U.S. government, one librarian has created a comprehensive dictionary and guide (*GovSpeak)* to non-military acronyms, abbreviations, and terms.[50]

Despite providing a unique, descriptive window into the culture of organizations, values and beliefs can be conveyed *through* language. For example, in one study of Fortune 500 mission statements, organizations that communicated they believe people can grow and improve tended to have more positive culture ratings on Glassdoor than companies that believe people do not change. In subsequent studies of employees at Fortune 1000 companies, this perception of culture impacted employee trust and commitment.[51]

However, many have started to view language and jargon as impediments to organizational effectiveness, despite their benefits of culturally binding people together. Instead of using "plain language," organizations that use jargon and acronyms actually create situations that lead to confusion and inefficiency.[52] Worse yet, language, jargon, and acronym usage can create a veil employees and leaders can use to portray unethical behavior in a positive light. For instance, one leaked message from luggage company Away's CEO portrayed cutting employee PTO and flexible work arrangements in a positive light as an opportunity: "I know this group is hungry for career development opportunities, and in

an effort to support you in developing your skills, I am going to help you learn the career skill of accountability… no new [paid time off] or [work from home] requests will be considered… I hope everyone in this group appreciates the thoughtfulness I've put into creating this career development opportunity and that you're all excited to operate consistently with our core values to solve this problem and pave the way for the customer experience… being best-in-class when it comes to being Customer Obsessed. Thank you!"[53]

Moreover the type of language used in organizations can influence workplace discrimination. For instance, mission statements that emphasized thoughtful consideration predicted whether the company was involved in EEOC discrimination suits.[54] Moreover, during the COVID-19 pandemic, employees and leaders in organizations that used stigmatizing labels for the virus were more likely to create negative, discriminatory experiences for Asian American employees.[55] Clearly, language is descriptively a window into organizations' culture, yet it can be a double-edged sword with its own pros and cons.

Creating and Sustaining Culture

16-3 Identify the factors that create and sustain an organization's culture.

An organization's culture does not pop out of thin air and once established, it is very resistant to change. What influences the creation of a culture? What reinforces and sustains it once in place?

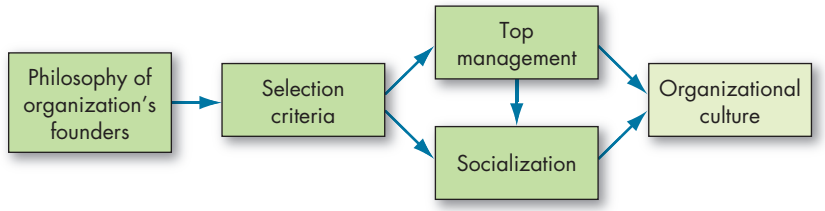
How a Culture Begins

An organization's customs, traditions, and general way of doing things are largely due to what it has done before and how successful it was in doing it. This leads us to the ultimate source of an organization's culture: the founders.[56] Founders have a vision of what the organization should be, and the firm's initial small size makes it easy to enact that vision with all members.

Culture creation occurs in three ways.[57] First, founders tend to hire and retain employees who think and feel the same way they do. Second, they socialize employees to their way of thinking and feeling. And finally, the behavior of the founder(s) encourages employees to identify with them and internalize their beliefs, values, and assumptions. When the organization succeeds, the founders' personalities become embedded in the culture. In fact, the founder is so important to the organization's success that one study of over two thousand firms found that the founding top management team made little to no difference in the firms performance later on in its life, whereas the CEO made all the difference.[58] The influence of the founder is so strong, that the cultural foundations established by the founder *even transmit to organizational spinoffs and splits* that break off from the parent organization as completely new organizations (see the discussion in the chapter on organizational structure).[59]

For example, the fierce, competitive style and disciplined, authoritarian nature of Hyundai, the giant Korean conglomerate, exhibited the same characteristics often used to describe founder Chung Ju-Yung.[60] Only gradually has the company started to shed the disciplined, competitive nature it was so entrenched in. As leadership ceded to Chung Mong-koo, and his son, Chung Eui-sun, subtle signs of culture change have been apparent. For instance, Frank Ahrens stepped into the Hyundai office and noticed a major change in the five years since he had been there. He asked his friends at Hyundai: "Where are all the ties?" They responded that the business casual attire was a symbol of the changing culture and new leadership.[61] Other founders with sustaining impact on their organization's culture include Bill Gates at Microsoft, Ingvar Kamprad

Exhibit 16-3 How Organizational Cultures Form



at IKEA, Herb Kelleher at Southwest Airlines, Fred Smith at FedEx, and Richard Branson at the Virgin Group.

Exhibit 16-3 summarizes how an organization's culture is established and sustained. The original culture derives from the founder's philosophy and strongly influences hiring criteria as the firm grows.[62] The success of socialization depends on the deliberateness of matching new employees' values to those of the organization in the selection process and on top management's commitment to socialization programs. Top managers' actions set the general climate, including what is acceptable behavior and what is not, and employees sustain and perpetuate the culture.[63] The culture then becomes linked and entrenched within the organizational structures and systems and is perpetuated by leadership. In the most comprehensive study of organizational culture to date (an impressive study of more than 500,000 employees from over 26,000 organizations), culture was found strongly related to the current leadership, practices, and structures that comprise the organization.[64]

Keeping a Culture Alive

Once a culture is in place, practices within the organization maintain it by giving employees a set of similar experiences.[65] The selection process, performance evaluation criteria, training and development activities, and promotion procedures (all discussed in the next chapter on HR policies and practices) ensure those hired fit in with the culture, reward those employees who support it, and penalize (or even terminate) those who challenge it.[66] Three forces play a particularly important part in sustaining a culture: selection or hiring practices, actions of top management, and socialization methods (e.g., onboarding, training, and including new employees). Let us look at each.

Selection The explicit goal of the selection process is to identify and hire individuals with the knowledge, skills, and abilities to perform successfully. The final decision, because it is significantly influenced by the decision maker's judgment of how well candidates fit into the organization, identifies people whose values are consistent with at least a good portion of the organization's.[67] The selection process also provides information to applicants. Those who perceive a conflict between their values and those of the organization can remove themselves from the applicant pool or even fake their way into the organization by feigning that they share the organization's values.[68] Selection thus becomes a two-way street, with both employers and applicants as active participants in determining the value fit between the applicant and the organization. For example, in W. L. Gore & Associate's selection process, teams put job applicants through extensive interviews to ensure that they can deal with the level of uncertainty, flexibility, and teamwork standard in Gore plants. Not surprisingly, W. L. Gore

appears regularly on *Fortune*'s list of 100 Best Companies to Work For (number eighty-three in 2020) partially because of its selection process emphasis on culture fit.[69]

Top Management The actions of top management have a major impact on the organization's culture.[70] Through words and behavior, senior executives establish norms that filter through the organization about, for instance, whether risk taking is desirable, how much freedom managers give employees, the uniforms employees should wear, and what behavior is desired and rewarded. Research on hundreds of CEOs and top management team (TMT) members suggests that more positive organizational outcomes are achieved when the culture and leadership styles are *complementary in content* and not *redundant*.[71] When leadership behaviors and an organization's cultural values are redundant, the leaders have less of an effect on organizational outcomes. However, when leaders provide something that is lacking in the organization's culture, they can substitute or fill in for the element that is missing. In other words, one can fill in where the other fails. For example, a transformational leader in a bureaucratic, hierarchical culture would be more effective than a transactional leader in the same type of culture.

The culture of supermarket chain Wegmans—which believes driven, happy, and loyal employees are more eager to help one another and provide exemplary customer service—is a direct result of the beliefs of the Wegman family. Their focus on fine foods separates Wegmans from other grocers—a focus maintained by the company's employees, many of whom are hired based on their interest in food. Top management at the company believes in taking care of employees to enhance satisfaction and loyalty. For example, Wegmans has paid more than $120 million in educational scholarships for more than 38,500 employees since 1984. Top management also supports above-average pay for employees and regularly appears on *Fortune*'s 100 Best Companies to Work For list (ranked third in 2020), in large measure because top management sustains the positive organizational culture begun by its founding members.[72]

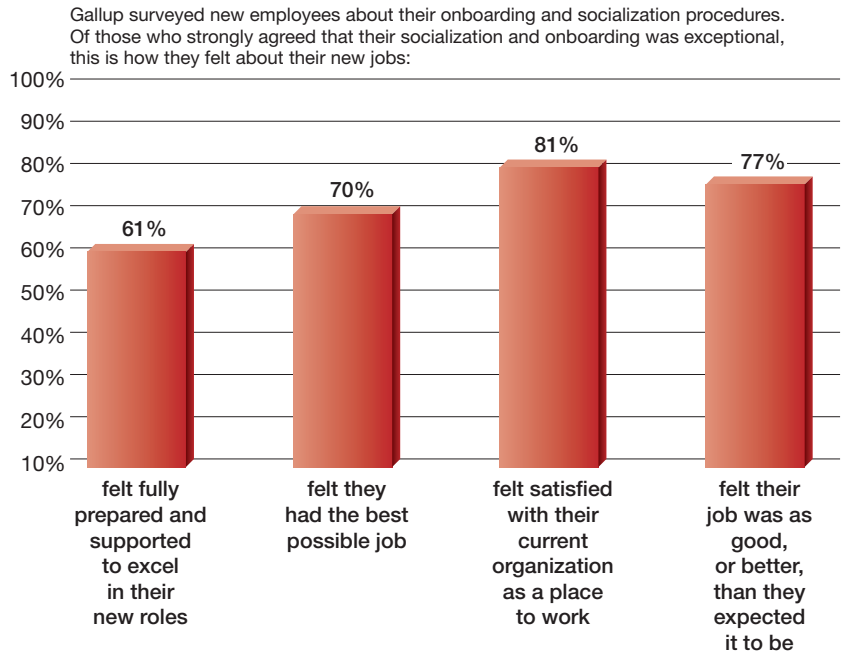
Socialization No matter how good a job the organization does in recruitment and selection, new employees need help adapting to the prevailing culture. This help comes in the form of **socialization**.[73] Socialization can help alleviate the problem many employees report when their new jobs are different from what they expected and can make or break how employees see their jobs moving forward (see OB Poll). For example, Essar Oil & Gas, an Indian petroleum production, refinement, and marketing company, has gamified its entire onboarding process. With the help of Indusgeeks, a game-based training firm, Essar has its new employees move through a 3D game on their first days that takes them through the work environment, lets them meet with various personnel (getting a sense for who is who in the office), and learn what they need before working.[74] Netflix, Quora, Twitter, and other companies are adopting fresh onboarding (new hire acclimation) procedures, including assigning "peer coaches," holding socializing events, and personalizing orientation programs. "When we can stress the personal identity of people, and let them bring more of themselves at work, they are more satisfied with their job and have better results," researcher Francesca Gino of Harvard said.[75]

socialization A process which enables new employees to acquire the social knowledge and necessary skills in order to adapt to the organization's culture.

We can think of socialization as a process with three stages: prearrival, encounter, and metamorphosis.[76] This process, shown in Exhibit 16-4, has an impact on the new employee's productivity, commitment to the organization, and decision to stay with the organization.

OB POLL

Exceptional Socialization Shapes Employee Expectations

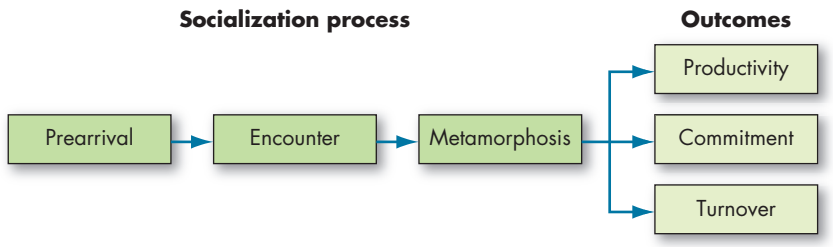


Source: Based on Gallup, *Creating an Exceptional Onboarding Journey for New Employees* (Washington, DC: Gallup, 2019).

1. *Prearrival stage.* The **prearrival stage** recognizes that everyone arrives with a set of values, attitudes, and expectations about both the work and the organization. One major purpose of a business school, for example, is to socialize students to the attitudes and behaviors companies desire in employees. Newcomers to high-profile organizations with strong market positions have their own assumptions about what it is like to work there.[77] Most new recruits will expect Nike to be dynamic and exciting and Merrill Lynch to be high in pressure and rewards. How accurately people judge an organization's culture before they join the organization and how positive, adaptive, and proactive their personalities are become critical predictors of how well they adjust.[78]
2. *Encounter stage.* The selection process can help inform prospective employees about the organization. Upon entry into the organization, the

prearrival stage The period of learning in the socialization process that occurs before a new employee joins the organization.

Exhibit 16-4 A Socialization Model



encounter stage The stage in the socialization process in which a new employee sees what the organization is really like and confronts the possibility that expectations and reality may diverge.

new member enters the **encounter stage** and confronts the possibility that expectations—about the job, coworkers, boss, and organization in general—may differ from reality.[79] If expectations were accurate, this stage merely cements earlier perceptions. However, this is not often the case. At the extreme, a new member may become disillusioned enough to resign. Proper recruitment, selection, and socialization (e.g., giving a realistic preview of the job) should significantly reduce this outcome, along with encouraging friendship ties in the organization—newcomers are more committed when friendly coworkers help them "learn the ropes."[80] For better or worse, learning, unlearning, and relationship building are key during this stage:[81] If newcomers are not proactive enough in learning about the organization and helping out where they can, if supervisors and coworkers do not do their due diligence in socializing the newcomer and fulfilling promises made during recruitment, or if the exchange between the newcomer and the employees is not good, newcomers may become disillusioned.[82] However, it is also possible for undesirable behaviors that may be an aspect of the organization's culture such as counterproductive work behaviors (CWBs) to be transmitted to employees during the encounter stage. For example, one study of manufacturing sales departments in southern China found employees may model undesirable behaviors, such as heavy drinking with clients, that may result in increased work–family conflict and turnover risk over time.[83]

3. *Metamorphosis stage.* Finally, to work out any problems discovered during the encounter stage, the new member changes or goes through the **metamorphosis stage**.[84] The options presented in Exhibit 16-5 are alternatives designed to bring about metamorphosis. Most research suggests two major "bundles" of socialization practices.[85] The more management relies on formal, collective, fixed, and serial socialization programs while emphasizing

metamorphosis stage The stage in the socialization process in which a new employee changes and adjusts to the job, work group, and organization.

Exhibit 16-5 Socialization Practices

Formal vs. Informal The more a new employee is segregated from the ongoing work setting and differentiated in some way to make explicit their newcomer's role, the more socialization is formal. Specific orientation and training programs are examples. Informal socialization puts the new employee directly into the job, with little or no special attention.

Individual vs. Collective New members can be socialized individually. This describes how it is done in many professional offices. They can also be grouped together and processed through an identical set of experiences, as in military boot camp.

Fixed vs. Variable This refers to the time schedule in which newcomers make the transition from outsider to insider. A fixed schedule establishes standardized stages of transition. This characterizes rotational training programs. It also includes probationary periods, such as the 8- to 10-year "associate" status used by accounting and law firms before deciding on whether or not a candidate is made a partner. Variable schedules give no advance notice of their transition timetable. Variable schedules describe the typical promotion system, in which one is not advanced to the next stage until one is "ready."

Serial vs. Random Serial socialization is characterized by the use of role models who train and encourage the newcomer. Apprenticeship and mentoring programs are examples. In random socialization, role models are deliberately withheld. New employees are left on their own to figure things out.

Investiture vs. Divestiture Investiture socialization assumes that the newcomer's qualities and qualifications are the necessary ingredients for job success, so these qualities and qualifications are confirmed and supported. Divestiture socialization tries to strip away certain characteristics of the recruit. Fraternity and sorority "pledges" go through divestiture socialization to shape them into the proper role.

divestiture, the more likely newcomers' differences will be stripped away and replaced by standardized predictable behaviors. These *institutional* practices are common in police departments, fire departments, and other organizations that value rule following and order. Programs that are informal, individual, variable, and random while emphasizing investiture are more likely to give newcomers a sense of their roles and methods of working. Creative fields such as research and development, advertising, and filmmaking rely on these *individual* practices.[86] Most research suggests that high levels of institutional practices encourage person–organization fit, high levels of commitment, and improved role clarity, whereas individual practices produce more role innovation, improve motivation, and lead to social integration.[87]

The three-part entry socialization process is complete when new members have internalized and accepted the norms of the organization and their work groups, are confident in their competence, and feel trusted and valued by their peers. They understand the system—not only their own tasks but the rules, procedures, and informally accepted practices as well. Finally, they know what is expected of them and what criteria will be used to measure and evaluate their work. As Exhibit 16-4 showed earlier, successful metamorphosis should have a positive impact on new employees' productivity and their commitment to the organization and reduce their propensity to leave the organization (turnover).

Researchers examine how employee attitudes change during socialization by measuring at several points over the first few months. Several studies have now documented patterns of "honeymoons" and "hangovers" for new workers, showing that the period of initial adjustment is often marked by decreases in job satisfaction as idealized hopes come into contact with the reality of organizational life.[88] Newcomers may find that the level of social support they receive from supervisors and coworkers is gradually withdrawn over the first few weeks on the job, as everyone returns to "business as usual."[89] Role conflict and role overload may rise for newcomers over time, and workers with the largest increases in these role problems experience the largest decreases in commitment and satisfaction.[90] The initial adjustment period for newcomers may present increasing demands and difficulties, especially for people who are energized by interpersonal interactions (e.g., extroverts), at least in the short term.[91] What can supervisors and coworkers do to address "hangovers"? Research suggests that "too many" socialization practices can make things worse, but providing a great deal of social support helps newcomers deal with their increasing demands and decreasing attitudes.[92]

What Do Cultures Do?

Let us discuss the role that culture performs and whether it can ever be a liability for an organization.

16-4 Compare the functional and dysfunctional effects of organizational culture on people and the organization.

The Functions of Culture

Culture defines "the rules of the game." First, it has a boundary-defining role: It creates distinctions between organizations. Second, it conveys a sense of identity for organization members. Third, culture facilitates commitment to something larger than individual self-interest. Fourth, it enhances the stability of the social system. Culture is the social glue that helps hold the organization together by providing standards for what employees should say and do. Finally, it is a sense-making and control mechanism that guides and shapes employees' attitudes and behavior. This last function is of interest to us in the study of organizational behavior (OB).[93] Organizational culture predicts the strategies

organizations adopt, the structure the organization assumes, the types of leadership styles used by leaders, and the practices adopted by the organization.[94]

A strong culture supported by formal rules and regulations (i.e., an organizational infrastructure) ensures that employees will act in a relatively uniform and predictable way. For example, research has shown that a positive organizational culture improves employee job attitudes and, as such, bolsters talent attraction and retention.[95] As another example, a study of the top 100 Taiwanese financial enterprises in 2005 demonstrated that those companies that valued innovation as a component of their culture were able to learn more and more quickly in order to drive innovation.[96]

Today's trend toward decentralized organizations (see the chapter on organizational structure) makes culture more important than ever, but ironically it also makes establishing a strong culture more difficult. When formal authority and control systems are reduced through decentralization, different forces of influence can pull culture in various, non-uniform directions. For instance, employees organized in teams may show greater allegiance to their team and its values than to the organization. Individual–organization "fit"—that is, whether the applicant's or employee's attitudes and behavior are compatible with the culture—strongly influences who gets a job offer, a favorable performance review, or a promotion.[97] It is no coincidence that Disney theme park employees appear almost universally wholesome and smile brightly. The company selects employees who will maintain that image.

Culture Creates Climate

organizational climate The shared perceptions that organizational members have about their organization and work environment; particularly, the policies, practices, and procedures that are in place.

Organizational climate refers to the shared perceptions that organizational members have about their organization and work environment.[98] These perceptions are directed at the policies, practices, and procedures experienced by the employees. Although it may appear difficult on the surface to distinguish organizational culture from climate, culture and climate are "two crucial building blocks for organizational description."[99] One meta-analysis found that, across dozens of different studies, positive climates were strongly related to individuals' level of job satisfaction, involvement, commitment, and motivation.[100] A positive workplace climate has been linked to higher customer satisfaction and organizational financial performance as well.[101]

In our discussion of culture so far, we have referred to culture as something that is difficult to measure somewhat esoteric. For instance, an employee of an organization for many years may have a much better understanding of an organization's culture than someone who just found out about the organization. Today, researchers agree that organizational climate represents the more readily observable "behavioral evidence" for an organization's culture.[102] It directly links what the organization values and believes with explicit practices, policies, and procedures. In other words, it puts the "what we believe and value" (like what you would find in a mission statement) and links it to what employees perceive is *actually* supported, rewarded, and practiced. If an organization is like an onion, the culture is at the core, and the climates are on the surface layers.

Culture creates climate. What members value, believe, and assume will ultimately affect the policies, practices, and procedures the organization puts into place. As an example, during the COVID-19 pandemic, you may have heard a manager in a commercial for your favorite local chain restaurant say something like "The health and safety of our employees and customers is our number one priority." What does this tell you about the company? Well, it probably tells you that they *value* safety, and it is something that they *believe* is imperative to pursue; in other words, that the organization has a "safety culture." With a safety culture in place, you are much more likely to see the local restaurants of this

chain taking cleanliness seriously by periodically wiping down high-touch areas, requiring mask compliance, and following social distancing precautions.

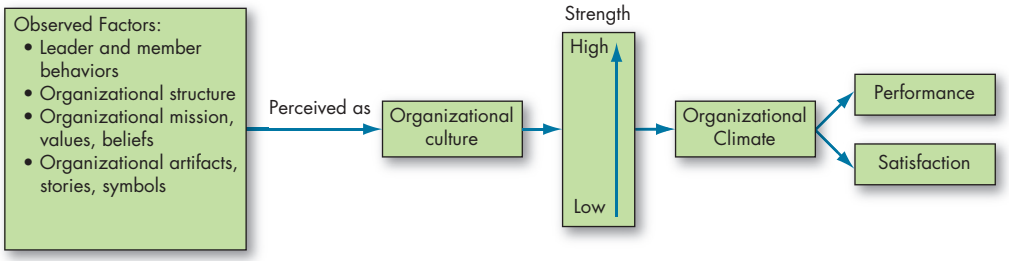
Dozens of dimensions of culture and climate have been studied—not just safety. Some of the commonly examined culture and climate dimensions include innovation, creativity, communication, warmth and support, involvement, justice, diversity, and customer service.[103] These dimensions have their own unique implications for OB, although many of them overlap (e.g., positive climates tend to co-occur with other positive climates).[104] For example, someone who encounters a safety climate will have higher levels of job satisfaction and organizational commitment, have better health, and be more prone to engage in safety behaviors.[105] Climate influences the habits that people adopt. If there is a climate of safety, everyone wears safety gear and follows safety procedures even if individually they would not normally think very often about being safe. Indeed, many studies have shown that a safety climate decreases the number of documented injuries on the job.[106] Climates can also interact with one another to produce various outcomes. For example, a climate of worker empowerment can lead to higher levels of performance in organizations that also have a climate of personal accountability.[107] They can also clash—organizations that simultaneously encourage caution and risk-taking can lead to dissonant feelings such as less commitment toward the organizations.[108]

Putting Culture Into Practice as Climate Although we often expect culture to manifest in a predictable way, there may be a difference between *espoused* (i.e., adopted on-the-surface) and *enacted* (i.e., actually put into practice) cultural values, beliefs, and assumptions. This difference has implications for how climate emerges.[109] In making sense of their environments, employees draw a distinction between what they "hear" or "see" being supported by organizational leaders in meetings, memos, rule books, and so on, and what they "actually" see being enacted. Climate, then, is a function of what employees perceive as being rewarded. When there is alignment between the context, culture, and climate, climates are more likely to be enacted and lead to positive outcomes.[110]

Returning to our COVID-19 example, did the organization you saw on television ever *do anything* about it? Let us say you went to one of these restaurant locations closest to you, and you were appalled to find absolutely none of the employees wearing masks, no one wiping down high-touch surface areas, and customers packed into tables with no regard for social distancing. You could say that this location had a poor "safety climate." But then, at your friend's urging, you tried a different location on the other side of town. You were shocked to see it was like night and day. They were at limited capacity, customers were spread out across the restaurant, all employees and customers were directed to wear masks, and you could see employees diligently cleaning high-touch surface areas. In other words, this location had a strong safety climate. This example illustrates that just as there can be subcultures that form in organizations, so too can different climates emerge in an organization.

Exhibit 16-6 depicts the impact of organizational culture. Employees form an overall subjective perception of the organization based on leader and member behaviors, the organizational structure, and the organization's values and beliefs as well as artifacts, stories, and symbols. This overall perception represents, in effect, the organization's culture, which varies in its strength (or degree to which others perceive the culture in the same way). The culture is then revealed through organizational climates, which manifest culture's underlying values and beliefs. The climates then affect employee performance and satisfaction, along with other outcomes relevant to organization.

Exhibit 16-6 How Organizational Cultures Have an Impact on Employee Performance and Satisfaction



Culture as an Asset

Cultures can contribute significantly to an organization's bottom line in many ways. Companies like Google, Adobe, and Samsung have recently been ranked as some of the best organizations to work for given their excellent cultures. For instance, one employee wrote about Adobe that the organization "genuinely cares about their employees and seek to have a positive impact on the world," highlighting its focus on ethics and sustainability.[111] In the following sections, we describe several cultures (and their corresponding climates) that affect attitudes and behavior in organizations.

Ethical Cultures and Climates Organizational cultures are not neutral in their ethical orientation, even when they are not openly pursuing ethical goals. **Ethical culture** develops over time as the shared concept of right and wrong behavior in the workplace. Ethical culture reflects the true values of the organization and shapes the ethical decision making of its members.[112] Ethical cultures espouse clear ethical standards, with ethical behavior modeled by leadership.[113] Employees and managers in ethical cultures are open to discuss moral issues and are reinforced for their ethical behavior.[114] Ethical cultures also reduce employee burnout and bolster engagement in *both* managers and employees.[115]

ethical culture The shared concept of right and wrong behavior in the workplace that reflects the true values of the organization and shapes the ethical decision making of its members.

Ethical climates are heavily influenced by the values and beliefs leaders hold about ethical behavior as well as the collective sense of identity people forge around their shared ethics.[116] An organization's ethical climate is a powerful influence on the way its individual members feel they should behave.[117] Ethical climates that emphasize self-interest are negatively associated with employee job satisfaction and organizational commitment, even though those climates appeal to helping oneself versus others. These climates are also positively associated with turnover intentions, workplace bullying, and deviant behavior.[118] Ethical climates that emphasize caring for one another and establishing rules may bring greater job satisfaction as well as reduce employee turnover intentions, workplace bullying, and dysfunctional behavior. Recent research also suggests that ethical climates have a strong influence on sales growth over time when there is also a customer service climate to support it.[119]

Sustainable Cultures and Climates **Sustainability** refers to maintaining practices over very long periods of time because the tools or structures that support the practices are not damaged by the processes.[120] Jeffrey Hollender created an organization that literally embodies the concept of sustainability: Seventh Generation. Founded in 1988, the company's name is based on an Iroquois proverb: "In our every deliberation, we must consider the impact of our decisions on the next seven generations."[121] The name serves as a symbol reflecting the value of sustainability to Seventh Generation. When we engage in business practices (e.g., enacting a

sustainability Maintaining practices over a long period of time because the tools or structures that support them are not damaged by the processes.

sustainability climate), we do so sustainably when we ensure that our practices can be continued and that we use resources responsibly, minimizing waste, maximizing reusability, and ensuring continued efficiency. *Social sustainability* practices address the ways social systems are affected by an organization's actions over time and, in turn, how changing social systems may affect the organization. Here, organizations should consider the effect of their labor practices on people over time, such as how job design (e.g., working hours) affects stress and health, how layoff policies and health insurance affect employees' well-being, and so on.[122]

A substantial majority of executives view sustainability as an important part of future success.[123] Indeed, research has demonstrated that sustainability practices can affect organizations' reputation, productivity, talent acquisition, retention, engagement, cost efficiency, innovation, and financial performance.[124] Concepts of sustainable management have their origins in the environmental movement, so processes that are in harmony with the natural environment are encouraged. For example, farmers in Australia have been working collectively to increase water use efficiency, minimize soil erosion, and implement tilling and harvesting methods that ensure long-term viability for their farm businesses.[125] In a very different context, Siemens has a comprehensive sustainability strategy that uses the United Nations' sustainable development goals as a guideline, focusing on improving peoples' health and well-being, taking action for clean energy and climate, and furthering education, peace, and justice across the globe.[126] With such a comprehensive focus on sustainability, it is no wonder that Siemens was ranked in the Top 10 Most Sustainable companies in the world in 2020, according to *Forbes*.[127]

To create a truly sustainable business, an organization must develop a long-term culture and put its values into practice through climate.[128] In other words, there needs to be a sustainable system for creating sustainability! In one workplace study, a company seeking to reduce energy consumption found that soliciting group feedback reduced energy use significantly more than simply issuing reading materials about the importance of conservation.[129] In other words, talking about energy conservation and building the value into the organizational culture resulted in positive employee behavioral changes. The leader plays a large role, too: Leaders engage in several behaviors to help build a sustainable culture, and some of them do so from formal positions (e.g., chief sustainability officer).[130] Like other cultural practices we have discussed, sustainability needs time and nurturing to grow.

Innovative Cultures and Climates The most innovative companies are often characterized by their open, unconventional, collaborative, visionary, and accelerating cultures.[132] Startup firms often have innovative cultures because they are usually small, agile, and focused on solving problems to survive and grow. Consider ad agency Droga5, recently bought by Accenture. As a startup, Droga5 sought to "redefine advertising, making it viral and into a union of marketing and entertainment instead of a 'disruption model of uninvited guests'" (e.g., intrusive or annoying commercials, ad spots, etc.).[133] Both Accenture and Droga5 have been listed on most innovative company lists, so the fit seemed to be a good one.[134] Because of the similar organizational cultures, the two may be able to continue their startup level of innovation. Research on companies such as these has found that innovation-friendly practices (support for new ideas, openness to change, and providing resources to be creative) leads to boosts in creativity at work, the creation and implementation of novel ideas, and increased performance.[135]

At the other end of the startup spectrum, consider Netflix. It went from a traditional mail-order DVD service to video-on-demand, even when it was the leader in its already large business. Netflix embodies, as Gary Pisano (professor at Harvard) notes, the "no, it doesn't have to be that way" culture.

When others were predicting their downfall when trying to innovate while they already "had a good thing going," they succeeded.[136] Innovation can also come from *subcultures*. For example, during the 2013–2018 period,

Toward a Better World

Morgan Stanley: Sustainable and Ethical Organizational Cultures Influence Investment Decisions

Decades ago, it used to be that the only factors that mattered included a company's tangible assets. Inventory, production, supply chains, revenue, leverage, and profit were what mattered at the end of the day. The times have changed. Nowadays, intangible assets (e.g., culture, people) comprise an estimated 52 percent of any given company's market value (and for some, it can be as high as 90 percent). Moreover, investors allocated over three times as many assets into socially responsible firms in 2020 as in 2019 and twenty-five times as many assets than in 2015. In fact, projections suggest that it will become a trillion-dollar business by 2030. Several investing firms like Morgan Stanley, BlackRock, Vanguard, and State Street are keenly aware of these facts. They have adjusted their strategy and focus to include culture as a key element of investing decisions.

Some organizations are dedicating entire R&D units to sustainable investment, like Morgan Stanley's Institute for Sustainable Investing. The institute is dedicated to mobilizing capital for sustainable firms, first and foremost. But the institute also works with academic institutions, universities, and colleges to conduct research and attain insights on environmental, social, and governance (ESG) investing best practices. The institute has its own culture with a clear mission set by James P. Gorman, the chair and CEO of Morgan Stanley: "It is abundantly clear that the solutions to global challenges can only achieve the required scale if they can attract a critical mass of private capital. To this end, we've established the Morgan Stanley Institute for Sustainable Investing to lead work across our firm, with our client, and with academic institutions to help mobilize capital to sustainable enterprises, via global markets and the investors who drive them."

How does Morgan Stanley advance the study of sustainable investing? Each year, in partnership with the Kellogg School of Management at Northwestern University, the institute hosts a Sustainable Investing Challenge, recruiting hundreds of graduate students worldwide to develop and pitch sustainable investing approaches for addressing ESG challenges. For instance, the 2021 grand prize winners were BeeBank & Brokerage—pitched by University of Oxford students to serve as a financial resource for bee farmers to stave off the extinction of honeybees. The competition has been held on an annual basis since 2011 and has resulted in many successful ventures.

However, many are skeptical of "ESG investing." Sony Kapoor (Managing Director of the Nordic Institute for Finance, Technology, and Sustainability), for instance, says that the truth "is only whispered in the corridors of finance—most ESG investing is a ruse to launder reputations, maximize fees, and assuage guilt." Furthermore, Tariq Fancy (BlackRock's former chief investment officer) remarked that "advancing real change in the environment doesn't yield the same return... No matter what they tout as green investing, portfolio managers are legally bound [to] do nothing that compromises profits."

Despite these criticisms, research suggests that these opinions may actually be myths not based on fact. Moreover, analyses of the returns on socially responsible and sustainable investments suggest that they perform just as well as or even better than the wider market. For instance, during the 2010s, companies with top-tier ESG ratings experienced *positive* earnings growth, return on investment, and investor dividends on average. In contrast, companies with bottom-tier ESG ratings experience *negative* losses on the same metrics. Indeed, research suggests that modern investors consider fairness in executive pay and the culture of the top management team, sustainability cultural values (e.g., sustainable natural resources, agriculture, carbon emissions, climate), and ethics-relevant cultural values (e.g., corrupt or toxic cultures) when making their investment decisions. As Audrey Choi, chief marketing officer and chief sustainability officer of Morgan Stanley, notes: "The biggest myth—and until recently, the biggest obstacle to the pursuit of sustainable investing—has been that to invest sustainability, one must sacrifice returns."

Although investors are paying much more attention to organization's ethical and sustainable cultures in their investment decisions, clearly the biggest obstacle now is no longer the misconception that ESG investments underperform the wider market. Instead, the biggest obstacle now is awareness. For instance, a Morgan Stanley report revealed that only 25 percent of individual U.S. investors are aware of the investing approach at all. Analysts are predicting a "tidal wave of growth" in the years to come for this practice.[131]



Founded in 1969, Samsung Electronics of South Korea is past the usual innovation life cycle stage yet continues to foster a climate of creativity and idea generation. Samsung emulates a startup culture through its Creative Labs, where employees like engineer Ki Yuhoon, shown here, take up to a year off from their regular jobs to work on innovative projects.

Source: Lee Jin-man/AP Images

researchers at NASA's Johnson Space Center documented a subculture group that became known as the "Pirates." They were known for directly opposing NASA's early values of hierarchy and revolutionizing the way employees ran mission control, resulting in an innovative and cost-focused culture.[137]

Culture as a Liability

Culture can influence employee attitudes and behaviors, which clearly can benefit an organization. Culture is valuable to employees too because it spells out what is important to organizations. The climates that follow illustrates how employees should put what is important into practice. But we should not ignore the potentially dysfunctional aspects of culture, especially a strongly negative one, on an organization's effectiveness. NBCUniversal, for instance, has been hit with boycotts, declining viewership, downsizing, and leadership shakeups in the wake of scandals suggesting it has a toxic culture, wrought with sexual harassment, bullying, insensitivity, and abuse.[138] Let's unpack some of the major factors that signal a negative organizational culture.

Stagnation and Entrenchment Culture is a liability when shared values do not agree with those that further the organization's effectiveness. This is most likely when an organization's environment is undergoing rapid change, and its entrenched culture may no longer be appropriate.[139] Consistency of behavior, an asset in a stable environment, may then burden the organization and make it difficult to respond to changes. Many times, we view this as a decision of members to "do what they always did," when in reality, sometimes they do so without even being aware of it.[140] For instance, the clothing company Old Navy has struggled with stagnation throughout its history. Most recently, many business

analysts have commented: "They [Old Navy's teams] didn't take any risks… I really think Old Navy has forgotten about the DNA of the brand… You're a fashion team. You can't just rest on your laurels—you've got to be on to the next thing."[141] Sometimes the antidote is an invigoration of fresh perspective: Employing outside, noncore directors and empowering internal personnel to identify and act on opportunities (e.g., *intra-preneurship*) are potential ways to address this negative cultural trajectory.[142] Alliances with other organizations can help as well. Consider the case of the joint auto plant where GM, whose workforce was struggling, teamed up with Toyota. Within just a year's time, GM's product quality increased, absenteeism dropped by 18 percent to near zero levels, strikes stopped, CWBs were squelched, and employees passionately embraced the change.[143]

Uniformity and Rigidity Hiring new employees who differ from organizational members in values, beliefs, or perspectives creates a paradox:[144] Management wants to demonstrate support for the differences that these employees bring to the workplace, but newcomers who wish to fit in are usually compelled to accept the organization's core culture. Second, because the influence of different perspectives is likely to diminish as people assimilate, strong cultures can become liabilities when they effectively eliminate the advantages of diversity. Third, a strong culture that condones prejudice, supports bias, becomes insensitive, or overemphasizes differences can undermine formal corporate diversity policies or the positive effects of demographic diversity.[145] Sometimes, this strong culture is perpetuated in the relationships people form and maintain without "switching up" membership. A rigid desire to "keep the peace" with current organizational members, take advantage of familiarity and comfort with one another, and build long-lasting relationships with those outside the company can thwart new relationships and ideas from emerging.[146]

It seems that these uniformity and rigidity barriers can start at the community level: One study of nearly 150 retail bank locations in the United States found that the composition of the community serves as an important signal in setting the inclusiveness norms that are adopted and made part of an organization's culture and climate.[147] These barriers can, in part, be addressed through cultures and climates of inclusion—by showing the organization's values and enacting them in an inclusive environment, diversity may flourish and employees may be more committed to the organization.[148] On the other hand, people from various backgrounds may perceive the culture and climates differently, undermining the effect positive cultures and climates may have on organizational outcomes.[149]

Toxicity and Dysfunctions We have discussed cultures that cohere around a positive set of values and beliefs. This consensus can create powerful forward momentum. However, coherence around negative and dysfunctional management values in a corporation can produce downward forces that are equally powerful yet toxic. When most people think of toxic cultures, they often think of cultures that have sink-or-swim beliefs, supporting abuse, harassment, or mistreatment to keep and maintain power. These detrimental cultural features can have devastating effects in organizations.[150]

As another example, research on hundreds of bank employees in about 150 branches of a large bank in the United States suggests that branch managers model conflict management styles, which then shape *conflict cultures* within each branch.[151] Dominating conflict cultures (i.e., encouraging active confrontation and aggressive competition among employees when there is conflict) tend to reduce branch cohesion and customer service performance. Collaborative cultures (i.e., encouraging proactive, constructive, and collaborative conflict

resolution), on the other hand, tended to increase the cohesion and satisfaction of the branch and decrease levels of burnout. Avoidance cultures (i.e., those that passively avoid conflict) tend to be less creative.

Toxic cultures do not just influence conflict in organizations—other dysfunctions matter as well. For instance, some organizations are solely focused on the bottom line numbers and results without caring how those numbers and results are achieved.[152] For instance, one former SpaceX employee commented on the *results-oriented culture*, working 12-plus-hour days and pulling all-nighters at the office—but enjoying the freedom to be able to meet the results on his own terms.[153] It is not that results-oriented cultures are toxic in and of themselves—it is just that they can be detrimental without an ethical culture to keep employees from disengaging from the ethical aspects of their work. Some cultures, such as those characterized by "lean management practices" (e.g., see the chapter on organizational structure),[154] can become toxic as employees are constantly afraid of losing their jobs (i.e., *job insecurity culture*). When employees are constantly in fear of their jobs, they may often forego certain important behaviors (e.g., safety) to accomplish their work more quickly.[155]

Culture Clashes Historically, when management looked at acquisition or merger decisions, the key decision factors were potential financial advantage and product synergy. In recent years, cultural compatibility has become the primary concern.[156] All things being equal, whether the acquisition works seems to have much to do with how well the two organizations' cultures match up. When they do not mesh well, the organizational cultures of both become a liability to the whole new organization. A study conducted by Bain and Company found that 70 percent of mergers failed to increase shareholder values, and Hay Group found that more than 90 percent of mergers in Europe failed to reach financial goals.[157] Considering this dismal rate of success, Lawrence Chia from Deloitte Consulting observed, "One of the biggest failings is people. The people at Company A have a different way of doing things from Company B… you can't find commonality in goals."

For example, one employee of a creative company acquired by a larger one who was transplanted from the East Village to Wall Street (in New York City) suggested the move was "more than physical, representing the scrappy creative adolescent putting on a tie."[158] In order for mergers or acquisitions to be successful, cultural integration is essential, as well as flexibility and complementarity in employee skills.[159] (Think back to the chapters on groups and teams and what we know about team diversity.)

Some cultures succeed *despite* their dysfunctional cultures. We can only wonder how much more successful these cultures would be if they reformed their toxic cultures. There are many more cases of business success stories due to excellent organizational cultures than there are of success stories despite bad cultures and almost no success stories because of bad ones. Research suggests that part of the reason why culture affects an organization's performance is through customer satisfaction: One study of nearly a hundred automobile dealerships over a six-year time frame found that a positive culture leads to improved sales performance because it increases customer satisfaction.[160]

Influencing Organizational Cultures

16-5 Describe the similarities and differences in creating positive, ethical, and innovative cultures.

As we discussed, the culture of an organization is set by its founders and is often difficult to change. Cultures are ideally established by a strong founder or founders who carefully plan the organization's culture beforehand, setting a solid foundation to weather times of crisis and success. That is seldom the case,

though; organizational culture usually grows organically over time. When we think of the development of culture as ongoing and conducted through each employee, we can see ways to increase the positive and ethical aspects of the environment, which we discuss next.

Developing a Positive Culture

At first, creating a positive culture may sound hopelessly naive or like a Dilbert-style conspiracy. The one thing that makes us believe this trend is here to stay, however, is signs that management practice and OB research are converging. A **positive organizational culture** emphasizes building on employee strengths, rewards more than it punishes, and encourages individual vitality and growth.[161] Let us consider each of these areas.

positive organizational culture A culture that emphasizes building on employee strengths, rewards more than punishes, and emphasizes individual vitality and growth.

Building on Employee Strengths Although a positive organizational culture does not ignore problems, it does emphasize showing workers how they can capitalize on their strengths.[162] As management guru Peter Drucker once said, "Most Americans do not know what their strengths are. When you ask them, they look at you with a blank stare, or they respond in terms of subject knowledge, which is the wrong answer."[163] Why not be in an organizational culture that helped you discover your strengths and how to make the most of them? Indeed, research from Gallup suggests that employees who have an opportunity to use their strengths every day are *six times more likely to be engaged on the job.*[164] How do you build on employee strengths? Help them find out what they are. For instance, one UK investment management company designated coaches to help employees understand their strengths and how to leverage them. These employees were able to develop their skills, adapt to changing conditions, and perform better.[165]

Rewarding More Than Punishing Although most organizations are sufficiently focused on extrinsic rewards such as pay and promotions, they often forget about the power of smaller (and cheaper) rewards such as praise (see the chapters on motivation). Part of creating a positive organizational culture is "catching employees doing something right." Many managers withhold praise because they are afraid employees will coast or because they think praise is not valued. However, as Charles Schwab once said, "I have yet to find the person, however great or exalted [in] station, who did not do better work and put forth a greater effort under a spirit of approval than [they] would ever do under a spirit of criticism."[166] Employees generally do not ask for praise, and managers usually do not realize the costs of failing to give it. Moreover, employees are often motivated by social inclusion and feeling like they belong to something greater than themselves. Validating and actively including employees who contribute positively to the organization can be one way of developing a positive culture.[167]

Consider O.C. Tanner, one Great Place to Work–certified company that conducted a survey on how managers can improve employee engagement. One of the questions on the survey asked, "What is the most important thing that your manager or company currently does that would cause you to produce great work?" In their own words, overwhelmingly, the majority of the employees asked said "more personal recognition" would be encouraging. Indeed, many organizations and consulting firms have recognized the positive influence of *recognition cultures* in improving organizational, team, and employee outcomes.[168]

Encouraging Vitality and Growth No organization will get the best from employees who see themselves as mere cogs in the machine. A positive culture recognizes the difference between a job and a career. It supports not only what the employee

contributes to organizational effectiveness but how the organization can make the employee more effective—personally and professionally. Top companies recognize the value of helping people grow. Safelite AutoGlass attributes its success in part to its award-winning PeopleFirst Plan talent development initiative. "The only way we can stand out is if we have the best people," says Senior Vice President Steve Miggo.[169]

Limitations of Positive Cultures Is a positive culture a cure-all? Though many companies have embraced aspects of a positive organizational culture, it is a new enough idea for us to be uncertain about how and when it works best. Not all national cultures value being positive as much as the U.S. culture does, and even within U.S. culture, there surely are limits to how far organizations should go. The limits may be dictated by the industry and society. For example, Admiral, a British insurance company, has established a Ministry of Fun in its call centers to organize poem writing, foosball, conkers (a British game involving chestnuts), and fancy-dress days, which may clash with an industry value of more serious cultures.[170] When does the pursuit of a positive culture start to seem coercive? As one critic notes, "Promoting a social orthodoxy of positiveness focuses on a particular constellation of desirable states and traits but, in so doing, can stigmatize those who fail to fit the template."[171] This has led many to deem positivity that has been taken to the extreme as *toxic positivity*—an approach that imposes unrealistic and psychologically damaging effects on employees who are pressured to be perfect and pure while actively avoiding perfectly natural negative states and conditions.[172] There may be benefits to establishing a positive culture, but an organization also needs to be objective and not pursue it past the point of effectiveness.

Developing an Ethical Culture

Despite differences across industries and cultures, ethical cultures share some common values and processes.[173] Therefore, managers can create a more ethical culture and climate by adhering to the following principles:[174]

- *Be a visible role model.* Employees will look to the actions of top management as a benchmark for appropriate behavior, but everyone can be a role model to positively influence the ethical atmosphere. Send a positive message.
- *Communicate ethical expectations.* Whenever you serve in a leadership capacity, minimize ethical ambiguities by sharing a code of ethics that states the organization's primary values and the judgment rules employees must follow.
- *Provide ethical training.* Set up seminars, workshops, and training programs to reinforce the organization's standards of conduct, clarify what practices are permissible, and address potential ethical dilemmas.
- *Visibly reward ethical acts and punish unethical ones.* Evaluate subordinates on how their decisions compare with the organization's code of ethics. Review the means as well as the ends. Visibly reward those who act ethically and conspicuously punish those who do not.
- *Provide protective mechanisms.* Seek formal mechanisms so everyone can discuss ethical dilemmas and report unethical behavior without fear of reprimand. These might include identifying ethical counselors, ombudspeople, or ethical officers for liaison roles.

A widespread positive ethical climate must start at the top of the organization.[175] When top management emphasizes strong ethical values, supervisors are more likely to practice ethical leadership. Clear expectations transfer down to line employees, who show lower levels of deviant behavior and higher levels

of cooperation and assistance. Several other studies have come to the same general conclusion: The values of top management are a good predictor of ethical behavior among employees. For example, one study involving auditors found perceived pressure from organizational leaders to behave unethically was associated with increased intentions to engage in unethical practices.[176] Clearly the wrong type of organizational culture can negatively influence employee ethical behavior. Conversely, ethical leadership has been shown to improve group ethical voice, or the extent to which employees feel comfortable speaking up about issues that seem unethical to them, through improvements in ethical culture.[177] Finally, employees whose ethical values are similar to those of their department are more likely to be promoted, so we can think of ethical culture as flowing from the bottom up as well.[178]

Developing an Innovative Culture

How can an organization become more innovative (see the chapter on perception and decision making)? Although there is no guaranteed formula, certain characteristics surface repeatedly when researchers study innovative organizations.

Sources of Innovation *Structural variables* are one potential source of innovation.[179] A comprehensive review of the structure–innovation relationship leads to the following conclusions:

1. **Organic structures positively influence innovation.** Because they are lower in vertical differentiation, formalization, and centralization, organic organizations (see the chapter on organizational structure) facilitate the flexibility, adaptation, and cross-fertilization that make the adoption of innovations easier.[180]
2. **Contingent rewards positively influence innovation.** When creativity is rewarded, firms tend to become more innovative—especially when employees are given feedback on their performance in addition to autonomy in doing their jobs.[181]
3. **Innovation is nurtured when there are slack resources.** Having an abundance of resources allows an organization to afford to purchase or develop innovations, bear the cost of instituting them, and absorb failures.[182]
4. **Interunit communication is high in innovative organizations.** These organizations are heavy users of committees, task forces, cross-functional teams, and other mechanisms that facilitate interaction across departmental lines.[183]

Context and Innovation National cultures have an effect on innovation in organizations:[184] One study using global data from a crowdsourcing company suggests that the more a country is characterized by strong social norms and low tolerance for any deviation from the norm, innovation tends to be stifled.[185] Cultural diversity at the local level also has an impact. Having close, interpersonal relationships (both romantic and friendship) with those from different culture backgrounds (such as those from international assignments) sparks innovation and entrepreneurship.[186]

Innovative organizations tend to have similar contextual features. First, they encourage experimentation, reward both successes and failures, and celebrate mistakes.[187] Second, they tend to share a common vision as well as underlying goals.[188] Third, they also tend to be cohesive, mutually supportive, and encouraging of innovation.[189] Fourth, they leverage human resources (HR) systems to



Based on its motto "Think Different," Apple has built a culture of innovation where employees share a passion for creating consumer-friendly products like the Apple Watch, shown here displayed by a customer at an Apple store in Toronto, Canada. Apple's supportive culture embraces cross-fertilization of ideas, collaboration, experimentation, and risk taking.

Source: Ryan Emberley/Invision/AP Images

promote innovation. For example, they promote the training and development of their members so they keep current, offer high job security so employees do not fear getting fired for making mistakes, and encourage individuals to become change agents (as discussed later in this chapter).[190] Work systems emphasizing commitment to employees increase team innovation.[191] These effects were even greater in teams where there was cohesion among coworkers.

Idea Champions and Innovation Martha Samuelson, CEO and chair of Analysis Group (a global economics consulting firm), believes the best ideas have *champions* who signal that they are worthwhile. She states that any idea that she intends to gain traction at the Analysis Group needs a champion, whom she trusts to be strategic, effective, and smart. This person needs to stand behind the idea and effectively adapt to setbacks. Coming up with and implementing new ideas is a challenge for anyone at any company. A competent idea champion accepts this challenge and demonstrates to others that there is belief in the idea and that it has potential.[192]

Once a new idea has been developed, **idea champions** actively and enthusiastically promote it, build support, overcome resistance, and ensure it is implemented.[193] Champions often have similar personality characteristics:[194] extremely high self-confidence, persistence, energy, and a tendency to take risks. They usually display traits associated with transformational leadership—they inspire and energize others with their vision of an innovation's potential and their strong personal conviction about their mission. Managers and employees alike should also be aware of the other types of reactions employees can have to the idea over time: For example, doubters will probably never get on board with the new idea, converts will start to like the idea more and more, and defectors are more likely to dislike the idea over time.[195] Keeping in mind these audiences, change agents can vary their message to try to obtain the best result.

idea champions Individuals who take an innovation and actively and enthusiastically promote the idea, build support, overcome resistance, and ensure that the idea is implemented.

Situations can also influence the extent to which idea champions are forces for change. For example, passion for change among entrepreneurs is greatest when work roles and the social environment encourage them to put their creative identities forward. On the flip side, work roles that push creative

individuals to do routine management and administration tasks diminish both the passion for and implementation of change.[196] Idea champions are good at gaining the commitment of others, and their jobs should provide considerable decision-making discretion. This autonomy helps them introduce and implement innovations[197] when the context is supportive.

Change

16-6 Discuss how change operates both within and outside organizations.

During the first quarter of 2018, 52.2 million iPhones were sold, compared with 78.2 million Samsung sales. Contrast this with the first quarter of 2019, in which considerably fewer (42 million) iPhones were sold, versus noticeably fewer (72 million) Samsung phones. In the first quarter of 2019, a new company, realme, split off from the Chinese mobile phone company OPPO and began progressively capturing market share through the first quarter of 2021. (It now has 4 percent of the market share.) At the same time, in the first quarter of 2018, roughly one-third (33 percent) of the market share was captured by boutique companies, and the remaining market share was captured by giants including the ranks of Xiaomi, OPPO, vivo, and Huawei. Although some companies capture roughly the same share of the market each quarter (e.g., Samsung, Apple), other companies experienced 5 percent or greater growth over the three-year span (e.g., Xiaomi, vivo) whereas others experienced 5 percent or greater losses (e.g., Huawei).[198] The 33 percent of market share left captured by boutique companies had been shrunk to 18 percent in the first quarter of 2021.

In this and many markets, competitors are constantly entering and exiting the field, gaining and losing ground quickly. However, sometimes this change is not entirely due to the efforts of the people within the company and is catalyzed by forces beyond the companies' control, for better or worse (see Exhibit 16-7 for

Exhibit 16-7 Forces for Change

Force	Examples
Nature of the workforce	More cultural diversity
	Aging population
	Increased immigration and outsourcing
Technology	Faster, cheaper, and more mobile computers and handheld devices
	Emergence and growth of social networking sites
	Deciphering of the human genetic code
Economic shocks	Rise and fall of global housing market
	Financial sector collapse
	Global recession
Competition	Global competitors
	Mergers and consolidations
	Increased government regulation of commerce
Social trends	Increased environmental awareness
	Liberalization of attitudes toward gay, lesbian, and transgender employees
	More multitasking and connectivity
World politics	Rising health care costs
	Negative social attitudes toward business and executives
	Opening of new markets worldwide

a summary and examples of forces behind organizational change). During the COVID-19 pandemic, for instance, companies like Zoom, DoorDash, and Amazon saw their revenues and profit margins skyrocket as people worked remotely, ordered delivery and takeout more often, and had common household items delivered.[199] It seems that change is a constant in this and many other environments.

The Nature of Change

Change is simply when things become different than the way they were. When changes are implemented, it leads to a natural redistribution of values, priorities, and resources that reverberate throughout the organization and transform employees interactions.[200] Oftentimes, changes are unplanned and happen naturally—however, certain situations involve proactive, intentional, and goal-oriented efforts to realize change, which all describe **planned change**.[201] For example, a major automobile manufacturer spent several billion dollars to install state-of-the-art robotics. Because the planned introduction of new equipment dramatically changed the jobs in the quality-control area and because management anticipated considerable employee resistance to it, executives developed a program to help people become familiar with the new equipment.

change When things become different than the way they were.

planned change Change activities that are proactive, intentional, and goal-oriented.

What are the goals of planned change? First, it seeks to improve the ability of the organization to adapt to changes in its environment. Second, it seeks to change employee behavior.

Who in organizations is responsible for managing change activities? The answer can be found in **change agents**.[202] They see a future for the organization others have not identified, and they are able to motivate, invent, and implement this vision.[203] Some change agents look to transform old industries to meet new capabilities and demands. For instance, Mashonda Tifrere left an impressive music publishing deal after being confronted with rampant sexism and bigotry in the music industry to be a change agent, founding ArtLeadHER, a platform to increase women's representation in the visual arts (backed by Beyoncé's BeyGOOD and Gucci's Chime for Change).[204]

change agents People who act as catalysts and assume the responsibility for managing change activities.

Change agents can be managers or nonmanagers, current or new employees, or outside consultants. Some research suggests that different change agents should be employed at various stages of the instance. For example formal leaders may be important earlier on to provide clarity and expectations, whereas peer change agents are important later on to motivate others to adopt the changes long-term.[205] However, many change agents fail because organizational members resist change. In the next section, we discuss resistance to change and what managers can do about it.

Resistance to Change

We often see change as threatening. Employees and managers alike who feel negatively toward a change cope by not thinking about it or even leaving the organization.[206] These reactions can sap the organization of vital energy when it is most needed.[207] Indeed, resisting change can be emotionally exhausting for employees.[208] Exhibit 16-8 summarizes major forces for resistance to change, categorized by their sources. Individual sources reside in human characteristics such as perceptions, personalities, and needs. Organizational sources reside in the structural makeup of organizations themselves.

Resistance does not necessarily surface in standardized ways. It can be overt, implicit, immediate, or deferred.[209] It is easiest for management to deal with overt and immediate resistance such as complaints, a work slowdown, or a strike threat. The greater challenge is managing resistance that is implicit or deferred

Exhibit 16-8 Sources of Resistance to Change

Individual Sources

Habit—To cope with life's complexities, we rely on habits or programmed responses. But when confronted with change, this tendency to respond in our accustomed ways becomes a source of resistance.

Security—People with a high need for security are likely to resist change because it threatens their feelings of safety.

Economic factors—Changes in job tasks or established work routines can arouse economic fears if people are concerned that they will not be able to perform the new tasks or routines to their previous standards, especially when pay is closely tied to productivity.

Fear of the unknown—Change substitutes ambiguity and uncertainty for the unknown.

Selective information processing—Individuals are guilty of selectively processing information in order to keep their perceptions intact. They hear what they want to hear, and they ignore information that challenges the world they have created.

Organizational Sources

Structural inertia—Organizations have built-in mechanisms—such as their selection processes and formalized regulations—to produce stability. When an organization is confronted with change, this structural inertia acts as a counterbalance to sustain stability.

Limited focus of change—Organizations consist of a number of interdependent subsystems. One cannot be changed without af fecting the others. So limited changes in subsystems tend to be nullified by the larger system

Group inertia—Even if individuals want to change their behavior, group norms may act as a constraint.

Threat to expertise—Changes in organizational patterns may threaten the expertise of specialized groups.

Threat to established power relationships—Any redistribution of decision-making authority can threaten long-established power relationships within the organization.

because these responses—loss of loyalty or motivation, increased errors or absenteeism—are more subtle and more difficult to recognize for what they are. Deferred actions also cloud the link between the change and the reaction to it, sometimes surfacing weeks, months, or even years later. Or a single change of little inherent impact may be the straw that breaks the camel's back because resistance to earlier changes has been deferred and stockpiled.

Is change good or bad? It is worth noting that not all of it is good. Rapid, transformational change is risky, so change agents need to think through the full implications carefully. Speed can lead to bad decisions, and sometimes those initiating change fail to realize the full magnitude of the effects or their true costs. Furthermore, during an acquisition, employee and middle manager resistance to change can be reduced through a slow, rather than fast, transition.[210] However, resistance to change can be positive if it leads to open discussion and debate.[211] These responses are usually preferable to silence (see the chapter on politics) and can indicate that members of the organization are engaged in the process, providing change agents an opportunity to explain the change effort. Change agents can also monitor the resistance to modify the change to fit the preferences of members of the organization.

Overcoming Resistance to Change Eight tactics can help change agents deal with resistance to change.[212] Let us review them briefly.

1. **Communication** Communication is more important than ever in times of change.[213] Changes are most effective when a company communicates a

rationale that balances the interests of various stakeholders (shareholders, employees, community, customers) rather than those of shareholders only.[214] Moreover, formal information sessions can decrease employees' anxiety about the changes, while providing high-quality information about the changes can increase their commitment to it.[215] Framing may also play a role. If the changes are framed (and perceived) as threatening, people may not comply, whereas if they are seen as a challenge or a positive influence on their working lives, they are more likely to champion the change, comply with it, and become engaged with their work.[216]

2. **Participation** It is difficult to resist a change decision in which we have participated. Assuming participants have the expertise to make a meaningful contribution, their involvement can reduce resistance, obtain commitment, and increase the quality of the change decision.[217] One study of the Sicilian anti-Mafia organization the Addiopizzo found that by involving organizations in directly questioning the *pizzo* (i.e., paying protection money to the Mafia) through an appeal to values (e.g., critical consumption, integrity, pride), they were able to successfully challenge the Mafia.[218] Studies of *change crafting* also suggest that resistance to change can be reduced when employees are given the autonomy to structure their jobs to meet these changing demands.[219] However, against these advantages are the negatives: the potential for a poor solution, a great consumption of time, and heightened resistance when employees already have too many job demands.[220]
3. **Building Support and Commitment** When managers or employees have low emotional commitment to change, they resist it and favor the status quo.[221] Employees are also more accepting of changes when they are committed to the organization as a whole.[222] So, providing organizational support (e.g., coaching and training programs to cope with the change) and developing a positive climate can enable employees to emotionally adjust to the change rather than embrace the status quo.[223] Counseling, new-skills training or a short paid leave of absence may facilitate adjustment to change when employees' anxieties about the change are high.
4. **Develop Positive Relationships** People are more willing to accept changes if they trust the change agents implementing them and see them as legitimate.[224] One study surveyed hundreds of employees from a large housing corporation in the Netherlands that was experiencing a merger. Those who had a more positive relationship with their supervisor and who felt that the work environment supported development were much more positive about the change process.[225] There is also a contrast effect, in which people are more willing to accept changes from a *new* leader when the older leader was ineffective, abusive, or too hands-off.[226] Underscoring the importance of social context, other work shows that even individuals who are generally resistant to change will be more willing to accept new and different ideas (and can even experience less stress) when they feel supported by their coworkers and believe the environment is safe for taking risks.[227] On the other hand, relational fault lines in teams (see the chapter on diversity, equity, and inclusion in organizations) negatively impact and undermine strategic change initiatives.[228] To facilitate positive relationship building, change agents should create spaces for employees to interact and communicate with one another as well as create guidelines for interaction that facilitate relationship building.[229]
5. **Implementing Changes Fairly** One way organizations can minimize negative impact is to make sure change is implemented fairly for coworkers, the organization, and other parties.[230] As we saw in the chapter on motivation concepts, procedural fairness is especially important when employees perceive an outcome as negative, so it is crucial that employees see the reason

for the change, are kept informed about its progress, and perceive its implementation as consistent and fair.[231] Moreover change recipients are not always self-interested: They focus on the impact that change has on their coworkers, the organization, and other parties when evaluating fairness.[232] Implementing changes fairly does not only affect whether employees accept or resist changes—it can also have a positive effect on change recipients' trust in the change agents.[233]

6. **Manipulation and Cooptation** *Manipulation* refers to covert influence attempts.[234] Twisting facts to make them more attractive, withholding information, and creating false rumors to get employees to accept change are all examples of manipulation. For example, when Billy McFarland (cofounder of the Fyre Festival) was exposed for fraudulent practices, he told them that "work is your family." As one employee recounted, "We're not a family. You won't even tell me anything!"[235] *Cooptation*, on the other hand, combines manipulation and participation.[236] It seeks to buy off members of a resisting group by giving them a key role, seeking their advice not to find a better solution but to get their endorsement. For example, the "right to repair" movement opposes manufacturing companies' monopolization of product repairs: Companies like Samsung co-opt by allowing customers to seek out "authorized repair providers," but they still can block repairs or decide the terms for the repair. As Nathan Proctor, director of the Right to Repair campaign, emphasizes, "First they ignore you, then they laugh at you, then they fight you… but then, as a last-ditch effort, *they co-opt you*." Both manipulation and co-optation are relatively inexpensive ways to gain the support of adversaries, but they can backfire if the targets become aware that they are being tricked or used. Once that is discovered, the change agent's credibility may drop to zero.
7. **Selecting People Who Accept Change** Research suggests the ability to accept and adapt easily to change is related to personality—some people are simply more resistant or receptive to change.[237] On one hand, Machiavellian employees (see the chapter on personality and individual differences) are more likely to react strongly to change initiatives by reducing their engagement and looking for new jobs.[238] On the other hand, individuals who are emotionally stable, have high core self-evaluations, are willing to take risks, and are flexible in their behavior are prime candidates.[239] Individuals higher in general mental ability are also better able to learn and to adapt to changes in the workplace.[240] In sum, an impressive body of evidence shows organizations can facilitate change by selecting people predisposed to accept it.
8. **Coercion** Last on the list of tactics is *coercion,* the application of direct threats or force on the resisters (see the chapter on power and politics).[241] Examples include threatening employees with forced transfers, blocked promotions, negative performance evaluations, and poor letters of recommendation. Coercion is most effective when some force or pressure is enacted on at least some resisters—for instance, if an employee is publicly refused a promotion request, the threat of blocked promotions will become a real possibility in the minds of other employees. However, as you may remember from the chapter on power and politics, coercion and pressure in general are hardly effective tactics and almost always backfire eventually.

The Politics of Change

No discussion of resistance would be complete without a brief mention of the politics of change. Because change invariably threatens the status quo, it inherently implies political activity. The impetus for change is more likely to

come from outside change agents, employees new to the organization (who have less invested in the status quo), or managers slightly removed from the main power structure. Managers who have spent a long time with an organization and who have achieved a senior position in the hierarchy are often major impediments to change. Of course, as you might guess, these long-time power holders tend to implement merely incremental changes when they are forced to introduce change. Radical change is often considered too threatening. This explains why boards of directors that recognize the imperative for rapid and radical change frequently turn to outside candidates for new leadership.[242]

Approaches to Managing Organizational Change

16-7 Compare the four main approaches to managing organizational change.

We now turn to several approaches to managing change: Lewin's classic three-step model, Kotter's eight-step plan, action research, and organizational development.

Lewin's Three-Step Model

Kurt Lewin argued that successful change in organizations should follow three steps: *unfreezing* the status quo, *movement* to a desired end state, and *refreezing* the new change to make it permanent[243] (see Exhibit 16-9).

By definition, status quo is an equilibrium state. To move from equilibrium—to overcome the pressures of both individual resistance and group conformity—unfreezing must happen in one of three ways (see Exhibit 16-10). For one, the **driving forces**, which direct behavior away from the status quo, can be increased. For another, the **restraining forces**, which hinder movement away from equilibrium, can be decreased. A third alternative is to combine the first two approaches. Companies that have been successful in the past are likely to encounter restraining forces because people question the need for change.[244] Once the movement stage begins, it is important to keep the momentum going. Organizations that build up to change do less well than those that get to and through the movement stage quickly. When change has been implemented, the new situation must be refrozen so it can be sustained over time. Without this last step, change will likely be short-lived, and employees will attempt to revert to the previous equilibrium state.

driving forces Forces that direct behavior away from the status quo.

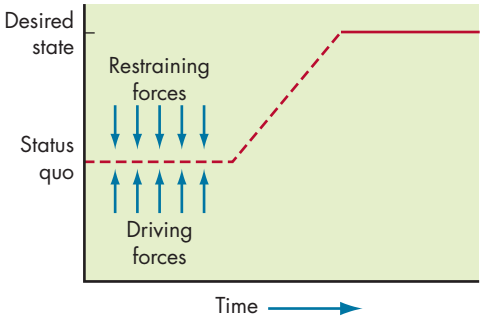
restraining forces Forces that hinder movement from the existing equilibrium.

Exhibit 16-9 Lewin's Three-Step Change Model



Scholars in recent years have criticized Lewin's model for several reasons.[245] First, like Maslow's hierarchy of needs (see the chapter on motivation concepts), Lewin assumes that change happens sequentially, in order, always progressing. Second, the model implies a sense of perfect agency for managers. In other words, do change agents really know where they are, where the people in the organization are, and where they are going? Organizations are so fluid that it may be impossible to do this in real life. Still others have mentioned that the "freezing" language is somewhat problematic: Time keeps moving, freezing may never really happen, and new changes interrupt current changes dynamically. Indeed, more modern approaches to understanding change in organizations consider issues such as timing, pacing, rhythm, and the nature of the change agents involved.[246]

Exhibit 16-10 Unfreezing the Status Quo



Kotter's Eight-Step Plan

John Kotter built on Lewin's three-step model to create a more detailed approach for implementing change.[247] Kotter began by listing common mistakes managers make when trying to initiate change. They may fail to create a sense of urgency about the need for change, a coalition for managing the change process, or a vision for change. They also may fail to communicate effectively about it and/or anchor the changes to the organization's culture. Moreover, they could also fail to remove obstacles impeding the vision's achievement and/or provide short-term and achievable goals. Finally, they may declare victory too soon.

Addressing these impediments to change, Kotter established eight sequential steps to overcome these problems. They are listed in Exhibit 16-11.

Notice how Kotter's first four steps essentially extrapolate Lewin's "unfreezing" stage. Steps 5, 6, and 7 represent "movement," and the final step works on "refreezing." So Kotter's contribution lies in providing managers and change agents with a more detailed guide for successfully implementing change.

Action Research

action research A change process based on systematic collection of data and then selection of a change action based on what the analyzed data indicate.

Action research is a change process based on the systematic collection of data and selection of a change action based on what the analyzed data indicate.[248] Its value is in providing a scientific methodology for managing planned change. Action research consists of five steps (note how they closely parallel the scientific method): diagnosis, analysis, feedback, action, and evaluation. Applications of action research have been successful at improving the engagement of nursing staff[249] as well as in making supply chain systems more sustainable,[250] for example. Furthermore, action research has been utilized by Optum, a healthcare company, through involving customer service specialists in determining more effective ways of engaging with customers.[251]

The change agent, often an outside consultant in action research, begins by gathering information about problems, concerns, and needed changes from members of the organization. This *diagnosis* is analogous to a physician's search to find specifically what ails a patient. Diagnosis is followed by *analysis*. What problems do people focus on? What patterns do these problems seem to take? The change agent synthesizes this information into primary concerns,

Exhibit 16-11 Kotter's Eight-Step Plan for Implementing Change

1. Establish a sense of urgency by creating a compelling reason for why change is needed.
2. Form a coalition with enough power to lead the change.
3. Create a new vision to direct the change and strategies for achieving the vision.
4. Communicate the vision throughout the organization.
5. Empower others to act on the vision by removing barriers to change and encouraging risk taking and creative problem solving.
6. Plan for, create, and reward short-term "wins" that move the organization toward the new vision.
7. Consolidate improvements, reassess changes, and make necessary adjustments in the new programs.
8. Reinforce the changes by demonstrating the relationship between new behaviors and organizational success.

Source: Based on J. Kotter, *Leading Change* (Boston, MA: Harvard Business School, 1996); M. du Plessis, "Re-implementing an Individual Performance Management System as a Change Intervention at Higher Education Institutions Overcoming Staff Resistance," *Proceedings of the 7th European Conference on Management Leadership and Governance,* 2011, 105–15.

problem areas, and possible actions. Action research requires the people who will participate in a change program to help identify the problem and determine the solution. So the third step—*feedback*—requires sharing with employees what has been found from the first and second steps. Now the *action* part of action research is set in motion. The employees and the change agent carry out the specific actions they have identified to address the problem together. The final step, consistent with the scientific underpinnings of action research, is *evaluation* of the action plan's effectiveness, using the initial data gathered as a benchmark.

Action research provides at least two specific benefits. First, it is problem-focused. The change agent objectively looks for problems, and the type of problem determines the type of change action. A second benefit of action research is the lowering of resistance. Because action research engages employees so thoroughly in the process, it reduces resistance to change. Once employees have actively participated in the feedback stage, the change process typically takes on a momentum of its own. However, organizations may resist participating in action research when their legitimacy is potentially or already at risk.[252]

Organizational Development

Organizational development (OD) is a collection of change methods that try to improve organizational effectiveness and employee well-being.[253]

organizational development (OD) A collection of planned change interventions, built on humanistic–democratic values, that seeks to improve organizational effectiveness and employee well-being.

OD methods value human and organizational growth, collaborative and participative processes, and a spirit of inquiry.[254] Contemporary OD borrows heavily from postmodern philosophy in placing heavy emphasis on the subjective ways people see and make sense of their work environment. The change agent may take the lead in OD, but there is a strong emphasis on collaboration. Below, we describe OD techniques or interventions for bringing about change.

Process Consultation Managers often sense that their unit's performance can be improved but are unable to identify what to improve and how. The purpose of **process consultation** is for an outside consultant to assist a client, usually a manager, through crafting "a relationship through a continuous effort of 'jointly deciphering what is going on' . . . to make coauthored choices about how to go on."[255] These events might include those surrounding workflow, informal relationships among unit members, and formal communication channels.

process consultation A meeting in which a consultant assists a client in understanding process events with which they must deal and identifying processes that need improvement.

Process consultation assumes we can improve organizational effectiveness by dealing with interpersonal problems through participation and involvement. Compared with other OD approaches, it is more task-directed, and consultants do not solve the organization's problems but rather guide or coach the client to solve their own problems after *jointly* diagnosing what needs improvement. The client develops the skill to analyze processes within their unit and can therefore use the skill long after the consultant is gone. Because the client actively participates in both the diagnosis and the development of alternatives, they arrive at a greater understanding of the process and the remedy, becoming less resistant to the action plan chosen.

Team Building We have noted throughout this text that organizations increasingly rely on teams to accomplish work tasks. **Team building** (see the point-counterpoint from the chapter on teams) uses high-interaction group activities to increase trust and openness among team members, improve coordination efforts, and increase team performance.[256] For example, a number of companies are turning to "escape rooms" as a team building method (where members have to work together and solve puzzles in order to escape a themed

team building High interaction among team members to increase trust and openness.

room).[257] As one Baltimore employee who participated in an escape room team-building exercise noted, "What comes out of an experience like that is a depended sense of relationship and community… once inside, it's when fun and team-building intersect at a high level."[258]

Team building typically includes goal setting, development of interpersonal relations among team members, role analysis to clarify each member's role and responsibilities, and team process analysis. It may emphasize or exclude certain activities, depending on the purpose of the development effort and the specific problems the team is confronting. Basically, however, team building uses high interaction among members to increase trust and openness. In these times when organizations increasingly rely on teams, team building is an important topic.

intergroup development Organizational development (OD) efforts to change the attitudes, stereotypes, and perceptions that groups have of each other.

Intergroup Development A major area of concern in OD is dysfunctional conflict among groups. **Intergroup development** seeks to change groups' attitudes, stereotypes, and perceptions about each other.[259] Here, training sessions closely resemble diversity training, except rather than focusing on demographic differences, they focus on differences among occupations, departments, or divisions within an organization. Once they have identified the causes of discrepancies, the groups move to the integration phase—developing solutions to improve relations between them. Subgroups can be formed of members from each of the conflicting groups to conduct further diagnoses and formulate alternative solutions.[260]

Among several approaches for improving intergroup relations, a popular one emphasizes problem solving.[261] Each group meets independently to list its perceptions of itself and another group and how it believes the other group perceives it. The groups then share their lists, discuss similarities and differences, and look for causes of disparities. Are the groups' goals at odds? Are the perceptions distorted? On what basis were stereotypes formulated? Have some differences been caused by a misunderstanding of intentions? Have words and concepts been defined differently by each group? Answers to questions like these clarify the exact nature of the conflict. Once they have identified the causes of discrepancies, the groups move to the integration phase—developing solutions to improve relations between them. Subgroups of members from each of the conflicting groups can conduct further diagnoses and formulate alternative solutions.

appreciative inquiry An approach that seeks to identify the unique qualities and special strengths of an organization, which can then be built on to improve performance.

Appreciative Inquiry Most OD approaches are problem-centered. They identify a problem or set of problems and then look for a solution. **Appreciative inquiry** instead accentuates the positive. Rather than looking for problems to fix, it seeks to identify the unique qualities and special strengths of an organization, which members can build on to improve performance.[262] It has been demonstrated to be an effective change strategy in organizations such as GTE, Roadway Express, American Express, and the U.S. Navy.[263] The U.S. dairy industry used it to transform its sustainability efforts, resulting in nearly $300 million in projects that were singled out as models for other industries.[264]

The appreciative inquiry process consists of four steps—discovery, dreaming, design, and destiny—often played out in a large-group meeting over two or three days and overseen by a trained change agent. *Discovery* sets out to identify what people think are the organization's strengths. Employees recount times they felt the organization worked best or when they specifically felt most satisfied with their jobs. In *dreaming*, employees use information from the discovery phase to speculate on possible futures, such as what the organization will be like in five years. In *design*, participants find a common vision of how the organization will

look in the future and agree on its unique qualities. For the fourth step, participants seek to define the organization's *destiny* or how to fulfill their dream, and they typically write action plans and develop implementation strategies.

The Change Paradox

Managers can learn a few lessons from **paradox theory**,[265] which states that the key paradox in management is that there is no final optimal status for an organization.[266] In a *paradox* situation, we are required to balance tensions across various courses of action, which are caused by resource scarcity.[267] There is a constant process of finding a balancing point, a dynamic equilibrium, among shifting priorities over time.[268] The first lesson is that as the environment and members of the organization change, different elements take on importance. For example, sometimes a company needs to acknowledge past success and learn how it worked, while at other times looking backward will only hinder progress. There is some evidence that managers who think holistically and recognize the importance of balancing paradoxical factors are more effective, especially in generating adaptive and creative behaviors in those they are managing.[269] However, leaders who adopt paradoxical approaches may fall into the trap of escalation of commitment (see the chapter on perception and decision making) given that they may be more optimistic that the current state of affairs will swing toward a more desirable one. In summary, a critical truth in OB is that change is constant—and so, too, are adaptation and adjustment to that change.

paradox theory The theory that the key paradox in management is that there is no final optimal status for an organization.

Summary

Organizational culture has a profound effect on organizational effectiveness, the behavior of its members, and how it responds to new challenges and changes in its environment. Values, beliefs, and underlying assumptions are the features that comprise culture and are what differentiate organizations from one another. Although organizational cultures can take on similar forms to one another, the picture is more complicated than it seems. For instance, subcultures can form regardless of the strength of the dominant culture. Cultures are initially established by the organization's founders, who select employees and managers they know will support its mission and values. Over time, the culture perpetuates as top management selects those who fit this prototype and "teach" employees culture through socialization practices. Employees learn culture by observing and participating in the organization's stories, rituals, symbols, and language. How does culture influence organizational effectiveness? It does so through the formation of climates, which establish policies, practices, and procedures that realize organizational values. In this way, organizations can realize positive (e.g., ethicality, sustainability, innovation) or negative (e.g., toxicity, rigidity, conflict) aims. Organizational leaders should aspire to develop positive, ethical, and innovative cultures if their mission and objectives call for it. However, organizational change is a massive challenge in and of itself. Leaders can proactively manage and plan for change, although often, their efforts will not always be successful. When leaders or employees act as change agents, they must overcome change resistance, navigate organizational politics, and manage the process of change. Several tools are available to accomplish these aims, but no one tool by itself is a "silver bullet." Overall, change is a constant, creating a paradox: There is no final optimal or perfect state. Therefore, cultural transformation and change management will almost always amount to unfinished business.

Implications for Managers

- Realize that an organization's culture is relatively fixed in the short term. To effect change, strategize a long-term plan.
- Although every culture is unique in its own way, researchers have uncovered four competing values that tend to have reliably similar effects on organizational outcomes. For innovation, try to build a clan culture. For customer satisfaction and quality, try to build a market culture. For employee attitudes and performance, try to build an adhocracy. Finally, if profitability and revenue are most important, try to build a hierarchy culture.
- Although you may think you have a strong, dominant culture, looks can be deceptive. You may be surprised to find that there are subcultures in departments, teams, or other work units. If you encounter these subcultures, try to determine what caused them to splinter off in the first place and decide what you can do to meet the needs of these employees.
- Stories, rituals, material symbols, and language are powerful mechanisms you can leverage to build and maintain culture.
- Starting a new company is a tall order—the decisions you make set the tone and foundation for the entire culture of your organization. Careful planning and strategizing are paramount to building positive, ethical, sustainable, innovative cultures.
- Several HR processes perpetuate culture: selection, top management, and socialization (onboarding) all play a role in transmitting culture. If you are looking to transform culture, start with these processes.
- Although values, beliefs, and underlying assumptions are relatively fixed aspects of culture, leaders can build organizational climates that realize these values.
- Managers would do wise to avoid culture traps. Stagnation, entrenchment, uniformity, rigidity, toxicity, and other dysfunctions can cause organizations to fail if they do not adapt and change.
- To build a positive culture, seek to develop employee strengths, reward more than punish, and encourage growth and vitality, but recognize that some negativity is perfectly natural, and positivity does not mean perfectionism.
- To build an ethical culture, be a visible role model for appropriate behavior, communicate ethical expectations, provide ethics training, reward (and punish) (un)ethical behavior, and protect whistleblowers.
- To build an innovative culture, focus on creating structures and contexts that nurture innovation, and ensure leaders "champion" their ideas to others so they catch on.
- To inspire organizational change, recognize that the process is extremely difficult and there is a high likelihood for failure. (That does not mean that the effort is not worthwhile, however.)
- Depending upon the nature of what you are trying to change, there are a variety of mechanisms and tools available (such as those provided by the field of organizational development) to facilitate change.

Organizational Change Management Is Not Worth the Effort

POINT

With the failure rate of organizational change estimated to be roughly 70 percent, it is clear that organizational change management is not working. Surveys of employees at organizations that have undergone transformations reveal that few respondents believe the organizations' change efforts have improved performance or sustained improvements.

Research has demonstrated that individuals have a negative bias toward preserving the status quo. For example, when someone is offered a bet with an equal probability of winning or losing, the average person requires a gain of twice the value of the potential loss before accepting the bet. Thus, a natural tendency to prefer avoiding losses rather than achieving equivalent gains leads individuals to prefer the status quo rather than change. Within organizations, this risk-averse behavior is compounded when there are thousands of individuals resistant to change.

As organizational behavioral experts Kenneth Thompson and Fred Luthans have noted, an individual's reaction to organizational change can be extreme and immediate. As a result, starting a new organization can even be easier than trying to change an existing one. For many years, those attempting to create change in organizations have viewed it as linear and sequential. In fact, it is often non-linear and can often be chaotic for those trying to manage change and employees who are forced to undergo dramatic changes.

COUNTERPOINT

We need to stop relying on the excuse that organizational change is too hard. Of course, we are biased toward expecting failure instead of success and this bias is hardwired into our brains. As a result, individuals perceive successful outcomes as rare and undesirable results as evidence that change is impossible. However, it is not true that organizational change is impossible. Rather, there are steps individuals can take to facilitate effective organizational change.

Successful transformation in organizations often starts in small groups that are loosely connected but share a similar purpose. Although leaders can advocate and give voice to the shared purpose, persuading others of the value of the change cannot just come from the top. For example, when Wyeth Pharmaceuticals began implementing lean manufacturing practices—a major transformation—it began doing so with just a few groups at a few factories. Gradually the practices were successfully implemented by thousands of employees across more than a dozen factories. The result was a 25 percent reduction in costs. Shaping individuals' mindsets can have a significant effect on the success of organizational change. University of Chicago researchers found that reminding people that most individuals can improve with a little effort led these people to notice positive changes more quickly than negative ones. If leaders prime employees with the simple idea that a change can have a high probability of success, they can reduce negative biases against that change.

Organizational change is indeed difficult and requires significant effort. However, this does not invalidate the fact that organizational change can succeed when using the right strategies. Change management is worth the effort as organizational change allows companies to succeed and grow, but only if employees can understand and commit to the changes and work effectively throughout the transformation process.[270]

CHAPTER REVIEW

QUESTIONS FOR REVIEW

16-1 What is organizational culture, and what are its common characteristics?

16-2 How is culture transmitted to employees?

16-3 What factors create and sustain an organization's culture?

16-4 What are the functional and dysfunctional effects of organizational culture?

16-5 What are the similarities and differences in creating positive, ethical, and innovative cultures?

16-6 How does change operate both within and outside organizations?

16-7 What are the main approaches to managing organizational change?

APPLICATION AND EMPLOYABILITY

In this chapter, you were introduced to organizational culture and change. You should also know now that they both matter—a poor organizational culture, in many ways, can be a make-or-break factor for an organization. Organizational cultures are now taken very seriously by organizations. By learning about organizational cultures and how they work, you are improving your employability by enabling you to adapt to distinct types of cultures, to craft positive organizational cultures if you are to be in a leadership position, and to demonstrate your fit with the values of a company at which you are interviewing. You are also aware of the negative aspects of organizational culture that will help you avoid or circumvent potentially troublesome situations when you are either on the job or applying to an organization with a negative organizational culture. Moreover, you learned just how difficult it is to change organizational cultures, how they are often ingrained in organizations by their founders, and how change efforts can be very slow and drudging. Nonetheless, you were equipped with many strategies to proactively manage organizational change, even if these practices do not enjoy guaranteed success. In this chapter, you improved your critical thinking, creativity, social responsibility, and leadership skills by evaluating the permanence of an organization's culture, differentiating between compassionate cultures in the banking industry, debating whether organizational change management is worth the effort, and considering the benefits of ESG investing. In the next section, you will improve your critical thinking and creativity skills and your career management skills by designing an organizational culture of your own, considering how you can change a toxic culture as a leader, and questioning the pros and cons of active cultures.

EXPERIENTIAL EXERCISE Culture Architects

Form groups of three to four students. Each group will be the founders of a new organization. The members of each group will draw on what they learned in the chapter and other materials to set the foundation for an effective organizational culture for their new company. Each group will need to provide the following information about their new culture and to justify their answers:

Name of the organization
Product or service provided
Founding members
Mission or vision statement
Three primary values guiding the organization
Five core beliefs that guide the conduct of business in the organization
Three examples of organizational policies, practices, or procedures that further the organization's vision or that reinforce the values
One or more material symbols or symbols that represent the organization's mission or values (can be a logo, description of clothes, use of language or jargon, and so on)

Questions

16-8. Was it difficult to come to a consensus on any of these elements when crafting the culture? What sorts of disagreements arose, and how did you solve them?

16-9. Do you think this foundation will definitely lead to the culture you intended? Why or why not? What sorts of changes, roadblocks, or other events might you see changing the culture or making it drift toward something that was not intended?

16-10. What types of specific socialization practices could you use so that new employees can best adapt to the organizational culture?

ETHICAL DILEMMA Toxic Culture

You arrive to work one morning to find the office surrounded by fire trucks. It turns out an employee was responsible for the fire. A few days earlier, you had made an unpopular announcement that the company would be closing its warehouse and trucking operations. These would be outsourced to FedEx. The news had not gone over well. Unfortunately, you knew that this incident was a symptom of a larger problem.

As the new CEO, you were determined to root out the toxic culture that had developed. There was clearly a lack of trust throughout the organization, negative employee attitudes, and resistance to collaboration. It started at the top with the majority owner, who had no formal position but was very involved in the company and created a culture of fear. It was evident that employees were afraid of him, and he preferred it that way. Even in your e-mail exchanges with him, he was aggressive and abusive.

After six months, you were able to buy out the majority owner. However, you knew that was just the first step. At the headquarters in California, you spent time meeting with the top thirty people at the company. You had these employees fill out a culture survey to gather anonymous

feedback and created a new mission statement and company values based on their input. Although you spent time communicating these throughout the company, over the next few months, nothing changed. Some employees had been working at the company for many years and did not feel compelled to change.

More drastic change was needed, so you decided to move the headquarters from California to Colorado. The move made sense as you lived in Colorado and most of the executives did as well. Leaving California would also allow you to leave behind employees who were impeding your ability to dismantle the toxic culture. Next, you and the executive team went through and assessed each employee on both competencies and cultural fit. People were rated as positive cultural influences, neutral, or cultural detractors. Individuals who were cultural detractors, no matter how competent, were not invited to move with the company. Many of these individuals were long-tenured employees who were too entrenched in the negative, toxic culture. Although the move was not easy or without its costs, you and the executive team were confident that these significant changes were necessary. By shedding these cultural detractors, it would allow for a more positive, collaborative culture.

Questions

16-11. Do you agree with this approach to dismantling the toxic culture? Explain.

16-12. Are there any other steps you would have taken as CEO to cultivate a more positive and collaborative culture? Explain.

16-13. How can one prevent the development of a toxic culture such as the one described?[271]

CASE INCIDENT Culture of Fear

A Sports Direct store is a fixture in nearly every town in the United Kingdom. Founded by Mike Ashley in 1982, the retailing group has grown to become Britain's largest sporting goods retailer, with approximately 465 stores and 29,000 employees. However, a number of reports, such as by *The Guardian* in 2015, revealed a number of questionable work practices. It seems that the company's success may have been underpinned by a culture of fear.

Undercover *Guardian* reporters at the company's Derbyshire warehouse found individual employees being told to work faster via a public-address system and security searches at the end of a shift (taking place after employees had clocked out). Most disturbing was the warning system, referred to as the "six strikes." You could receive a "strike" for a number of reasons, including errors in your work, having long toilet breaks, or a period of reported sickness. Receiving six strikes in a six-month period would result in your contract being terminated.

In 2016, a Parliamentary committee was set up to investigate the claims from *The Guardian* and other sources. They concluded that the success of Sports Direct had been achieved through a culture that allowed some employees to be treated without dignity or respect. Although the committee did concede that there were probably other organizations guilty of employee mistreatment, they identified Sports Direct as a particularly bad example of this type of exploitation.

Reviewing evidence regarding the "six strikes" policy, the committee heard from a union representative who described people coming to work ill as they feared that they would receive a strike for calling in sick. This increase in presenteeism—going to work when you are too ill to do so—poses health and safety risks. Between January 1, 2013, and April 19, 2016, a total of 110 ambulances or paramedics were dispatched to the warehouse. Of these, 50 cases were classed as life-threatening, including a woman giving birth in the toilet. Although strikes were often given in a very arbitrary manner, the committee concluded that workers were unlikely to argue as they were employed as agency workers and protest could mean that they would probably not be given as many hours of work in the future.

The strict control systems in force suggest a strong culture; however, it is difficult to say whether this case highlights a subculture specific to the warehouse or a dominant culture demonstrating core values across the organization. It is clear that there was a negative workplace climate at the warehouse that was affecting the health and well-being of the employees. After the committee, Ashley agreed to look into a number of issues, including the "six strikes" policy and allegations of bullying and physical intimidation. After all, as the founder of the company, a cultural change has to be driven by him.[272]

Questions

16-14. How would you describe the culture at the Sports Direct warehouse? How might this culture be a liability to the organization?

16-15. What does the case study tell you about the six characteristics of organizational culture at Sports Direct?

16-16. With so many stores and employees, how do you change the organizational culture at Sports Direct? What action do you think should be taken and by whom?

17 Human Resource Systems and Practices



Source: Gerenme/E+/Getty Images

LEARNING OBJECTIVES

After studying this chapter, you should be able to:

17-1 Describe the value of recruitment methods.

17-2 Specify initial selection methods.

17-3 Identify the most useful substantive selection methods.

17-4 Compare the main types of training.

17-5 List the methods of performance management.

17-6 Discuss how reasonable accommodations make accessible workplaces.

17-7 Describe the leadership role of human resources (HR) in organizations.

Employability Skills Matrix (ESM)

	Myth or Science?	An Ethical Choice	Point/ Counterpoint	Toward a Better World	Experiential Exercise	Ethical Dilemma	Case Incident
Critical Thinking & Creativity	✓	✓	✓	✓	✓	✓	✓
Communication					✓		
Collaboration				✓	✓	✓	
Self-Management	✓						✓
Social Responsibility	✓		✓	✓		✓	✓
Leadership		✓	✓	✓	✓	✓	
Career Management	✓	✓		✓		✓	

NO RÉSUMÉ NEEDED

Staffing processes are usually expensive and time-consuming. Organizations spend roughly $4,100 per employee processing résumés, conducting interviews, completing background checks, and administering drug tests. At the same time, many business leaders face pressure to adopt more inclusive practices in their companies. Hiring practices often exclude millions of potential employees, including homeless individuals, previously incarcerated individuals, and individuals in recovery. Is it possible, though, that there is a solution that allows organizations to meet their specific workforce needs while also creating economic opportunities for individuals who traditionally face barriers to employment?

Since opening in 1982, Greyston Bakery in Yonkers, New York, has successfully used an "opening hiring" strategy. The company, which produces millions of pounds of baked goods for customers like Ben & Jerry's and Whole Foods Market, has remained successful while also putting money back into the community of southwest Yonkers. This approach means individuals are offered a position when they are next on the list of people who have indicated they are interested in working at the bakery. No background check, drug test, job interview, or résumé is required. As a result, Greyston essentially has no hiring costs. Instead, the company invests roughly $1,900 into hard and soft skills training for each new employee. The key, though, to making this strategy successful is the other services that the organization provides. Greyston recognizes that for employees to be successful, there are various factors outside work that play a role. The bakery connects employees with resources to find health insurance, housing, child care, and transportation

to ensure they are as successful as possible at their job. Greyston reports that using this model can generate a local economic impact of $7 million annually. This impact is due to public assistance savings, increased tax revenue, and reduced incarceration costs.

Greyston Bakery has not stopped there—it is also working to assist other employers with implementing open hiring through its Center for Open Hiring. Six businesses have successfully incorporated this model into hiring practices, including The Body Shop's international cosmetics company.

OM-4Although adopting open hiring to the same extent as Greyston Bakery may not be possible for every organization, it is likely feasible to apply some elements of its practices. While some leaders may have concerns about a lack of accountability in this type of system, on the contrary, Greyston Bakery has strict standards for employees that are enforced. As Greyston's general manager notes, performance problems are often a result of what is happening in an employee's life today, not due to their past. The company's model has demonstrated that it can prevent these potential issues from interfering with employees' performance. Open hiring is not necessarily for all businesses. Still, it can be an impactful, practical, and profitable solution to many of the issues that organizations face.[1]

Human resources (HR) systems and practices—such as employee recruitment, selection, training, and performance management—influence people's behavior in organizations and, ultimately, an organization's effectiveness.[2] Why should we care about HR systems and practices in an organizational behavior (OB) textbook? The answer is that HR and OB are inextricably linked—with HR systems and practices influencing manager and employee behavior and vice versa.[3] And the cycle never ends. As Suzanne Lucas, a former HR consultant for Wyeth Pharmaceuticals and Wegmans Food Markets (who goes by the pseudonym "Evil HR Lady"), notes: "HR problems never, ever end. You will never have a day when you can say, 'I'm finished. All the employees are happy. All the policies and procedures comply. All managers have the proper training. And everyone is getting along just beautifully.' This will never happen."[4] All the more reason to get a pulse on what you can do, as a manager and as an employee, to navigate HR systems and behavior in organizations. Let us discuss the most important HR systems (e.g., recruitment, selection, training, and performance management) and their effect on OB, beginning with the recruitment function.

Recruitment

17-1 Describe the value of recruitment methods.

The first stage in any HR system is recruitment,[5] closely followed by selection (i.e., the hiring process). Organizations spend a considerable amount of money on recruitment. On average, they spend about $4,425 per hire ($14,936 per executive hire).[6] These expenses amount to nearly 15 percent of the entire HR budget on average.[7] A selection system can only be as good as the individuals who apply in the first place.[8] In fact, over the last century, researchers have

suggested that recruitment and selection, which dictates the flow of talent into organizations, is the "Supreme Problem" facing HR managers.[9] Recruitment is very important for OB because how job seekers, applicants, recruiters, employees, and managers behave during this process can make the difference between a job offer acceptance or losing out on a great employee.

Applicant Attraction

To solve this "Supreme Problem," strategic recruitment has become a cornerstone for many companies. These recruitment practices are developed in alignment with long-term strategic goals. As for defining "success" in recruiting, most research suggests that the best systems attract the most qualified candidates.[10] Such candidates are likely to have a better fit between their skills and the job requirements and to be more satisfied in the jobs they take. Therefore, the primary recruitment outcome of interest in OB is **applicant attraction**, or the degree to which an individual is drawn toward an organization, intends to apply for a job at that organization, and would accept a job offer if given one.[11]

applicant attraction The degree to which an individual is drawn toward an organization, intends to apply for a job at that organization, and would accept a job offer if given one.

Although some individuals' personality traits (e.g., extroversion and conscientiousness) predispose them toward attraction in general,[12] applicant attraction is largely driven by the characteristics of the position and organization (i.e., pay, reputation), job seekers' perceived fit with the organization, their impressions of the recruiter, the fairness of the recruitment process (e.g., timely responses), and whether they believe they will be successful if they apply and get the job.[13] Of these characteristics, perceived fit and impressions of the recruiter appear to be most important early on in the recruitment process.[14] Moreover, material symbols (e.g., the logo, imagery, social media presence; see the chapter on culture and change) play a major role. They signal the organization's values (e.g., corporate social responsibility, innovation), which may or may not resonate with the job seeker.[15] Corporate talent acquisition and management professionals actively seek to manage these impressions.[16] However, there is a dark side to applicant attraction: Vague job requirements can lead applicants to come to the wrong conclusions about the nature of the job and lead job seekers to feel entitled to being hired or deserving of a higher salary.[17] HR professionals should be very clear and specific in their communications about who they are looking for to avoid any misunderstanding.

The Ubiquity of Referral Hiring

A look at the OB Poll demonstrates that most hiring managers and HR professionals responsible for hiring source their applicants through their professional networks (61 percent). Many organizations actively encourage this practice of **referral hiring**, or when a hiring manager decides to hire a job seeker based on their own previous experiences with that individual or a recommendation from a referrer (e.g., a previous coworker, a friend from college). People are motivated to refer others for positions, perhaps because their organization pays them referral "bonuses" for bringing qualified applicants on board or perhaps as a way to enhance their reputation, reduce the risk of hiring someone "no one knows," or otherwise strengthen the relationships between people in the network. These referred job seekers often have the upper hand. Their stronger social ties and the referrer's reputation can influence the hiring decision and give them access to privileged information. Once on the job, their preexisting relationships make the onboarding process easier, as a social tie between the hiring manager and the hiree already exists.[18]

referral hiring When a hiring manager decides to hire a job-seeker based on their own previous experiences with that individual, or a recommendation from a referrer (e.g., a previous coworker).

Even though everyone does it, should they? Research is just beginning to test the usefulness of this practice. One perspective suggests that referral hiring *enriches*

the workplace. Call center employees who refer their friends and network contacts to work at their company stay longer and perform better than those who do not engage in referral hiring.[19] On the other hand, the perspective of the other employees matters quite a bit. For instance, referrers with a great deal of power (see the chapter on power and politics) are often viewed by other employees as self-interested and power-seeking. In this dynamic, the other employees are more likely to judge the referrer and the job seeker more harshly and support the hiring decision less than if the referral was from someone lower in power.[20]

The Role of Recruiters

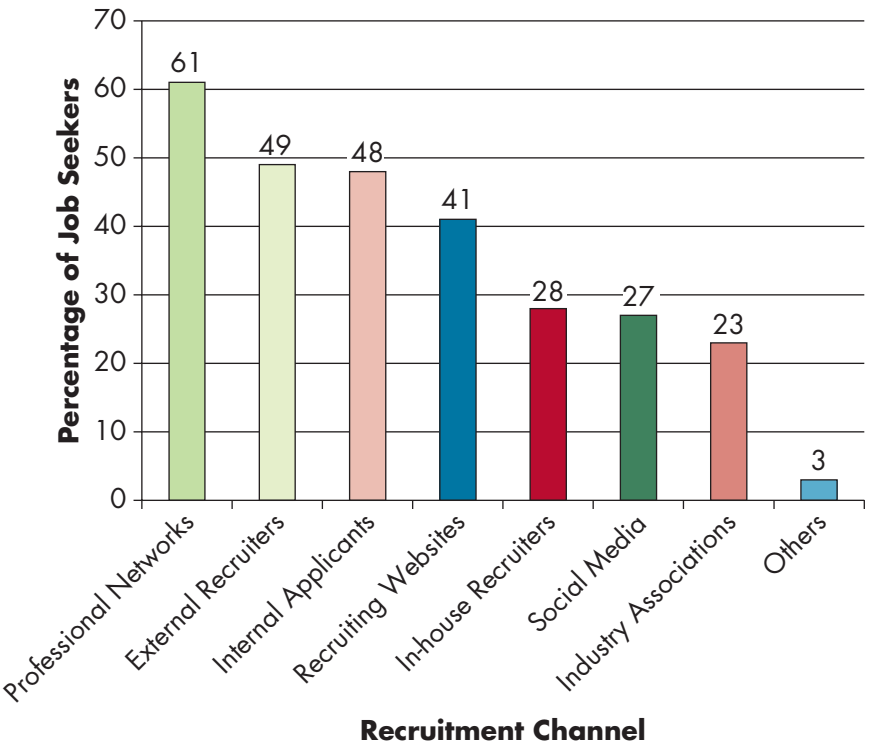
Companies are increasingly turning away from outside recruiting agencies and relying on their own executives and HR professionals for talent searches.[21] As shown in the OB Poll, 49 percent of organizations use external recruiters, and 28 percent of organizations use in-house recruiters to source their executive and managerial talent.[22] However, the numbers reverse for non-executive talent: 89 percent of organizations use their own in-house talent for recruitment initiatives.[23] If the organization has a large applicant flow (i.e., continuously sourcing and hiring people for a revolving door of open positions), it may want to consider creating dedicated recruiter positions. On average, dedicated recruiters can handle 2.7 times more *requisitions* (i.e., open positions) than HR professionals with other responsibilities.[24] Indeed, research on over seventy-eight thousand job seekers has demonstrated that the role of recruiters is important in reaching out to potential applicants (e.g., students) early on in their careers and providing them with rich information.[25]

The most effective recruiters—internal or external—are well informed about the job, are efficient in communicating with potential recruits, and treat recruits with consideration and respect.[26] In addition, internal recruiters must use fair and just practices while recruiting employees because fairness perceptions are related to job offer acceptance.[27] Recruiters also use various online tools, including job boards and social media, to bring in applications. Online recruiting has yielded an exponentially increased number of applications, even as the means to identify the best online recruitment sources are still developing.[28] Social networking services have facilitated many connections. Some organizations are pioneering unique methods, such as online programming contests that masquerade as games, to identify individuals with top skill sets who may be attracted to apply for positions. These contests have been successful in recruiting applicants from all over the globe.[29]

As a final note on recruiters, it is important to recognize that just as bias can filter into hiring managers' and interviewers' perceptions of candidates, so does it filter into recruiters' perceptions of job seekers. For instance, recruiters tend to provide job-seeking women with less information on leadership positions than men and feel more anxious when interacting with them.[30] Moreover, job seekers from unrepresented racial groups report receiving less recruitment source information in total, which can lead them to be less attracted to certain job positions than other job seekers and perform worse during the hiring process itself.[31] Instead, recruiters should seek to tailor their signals to meet the diverse needs of the various people they interact with (especially in cross-cultural contexts),[32] provide equal access to recruitment materials to all potential job seekers,[33] and use recruitment as an opportunity to showcase the organization's own diversity management efforts.[34] It is also worth noting that it is a two-way street.[35] If recruiters' prejudicial behavior leads underrepresented job seekers to have negative experiences, it may very well cause them to take their talents elsewhere (e.g., competitors)[36] and for job seekers to "spread the word" about their experiences to others.[37]

OB POLL

How Are Job-Seeking Managers Recruited?*



*Note: Based on a survey of 1,641 HR managers from different firms.

Source: Based on Society for Human Resource Management, *SHRM Customized Talent Acquisition Benchmarking Report* (Alexandria, VA: SHRM, 2017).

Realistic Job Previews

Employers are increasingly using recruitment methods beyond signaling values and attracting job seekers into the realm of previewing the actual work performed and evaluated. These are sometimes known as **realistic job previews** or job tryouts. They are given to demonstrate to job seekers what they would be doing on the job. Realistic job previews help to clarify and manage applicant expectations. For instance, SHL (a management consulting and assessment development firm) offers a realistic job preview for the sales professionals it hires.[38] Potential applicants can determine whether the job is right for them before even beginning an application. Experts are finding that they decrease turnover because both employers and new hires know what they are getting into ahead of time.[39]

realistic job previews A job tryout given to demonstrate to job seekers what they would be doing on the job if they were hired.

However, there is a "human" element to realistic job previews beyond merely managing applicants' expectations and preventing turnover. As Melissa Corwin, the VP of Employee Experience at AT&T, puts it, "[We make] sure that incoming candidates really understand AT&T's values, culture, and what it's like to work here. We've created job preview videos that we constantly refresh so candidates get a truly accurate, comprehensive view of what it's like to be in a specific role and a specific environment at AT&T."[40] Moreover, Stacy Van Meter (VP Talent Acquisition at Deluxe) notes that through using realistic job previews, Deluxe can ensure that "every candidate [walks] away from their experience feeling like they matter, whether they got the job or not."[41]

Selection

17-2 Specify initial selection methods.

One of the most important HR functions is hiring the right people. When companies hire the right people, they increase their human capital resources. **Human capital resources** are the capacities available to an organization through its employees.[42] The resources include specialized skills, collective knowledge, abilities, and other resources available through an organization's workforce. These resources can be activated through leaders' behaviors (see the chapter on leadership).[43] Moreover, they change over time as the person and environment shift (e.g., as employees develop new skills, as role requirements for a position change).[44]

human capital resources The capacities of a work unit derived from the collective knowledge, skills, abilities, and other resources of the organization's workforce.

How does a manager figure out who the right people are from the sea of job seekers, applicants, and candidates? Identifying the right people who meet the demands and requirements of the job, whose abilities fit the needs of the open position, and who match the culture of the company is the objective of *the selection process*. This process matches individual characteristics (ability, experience, and so on) with the job requirements.[45] When management fails to get a proper match for a position, employee performance and satisfaction both suffer, which can lead the employee to find a job elsewhere. The cost of turnover is not only up to twice that employee's annual salary, it is also losing that individual's contribution to the organization's human capital resources—a contribution that could very well be taken to a competitor.[46] Therefore, it is paramount to ensure that your organization has an effective method for identifying the most qualified applicants.

How the Selection Process Works

Exhibit 17-1 shows how the selection process works in most organizations. Having decided to apply for a job, applicants go through several stages—three are shown in the exhibit—during which they can be rejected at any time. In practice, organizations often under-emphasize some of these steps (or forego them entirely) in the interest of saving time or not scaring away candidates. For example, crime scene cleaners are in high demand, and the job can pay upward of $80,000 annually. However, they do not require many of the basic qualifications used for many other jobs (e.g., years of experience, higher education).[47] Regardless, most organizations follow a process that looks something like this exhibit. Let us go into a bit more detail about each stage.

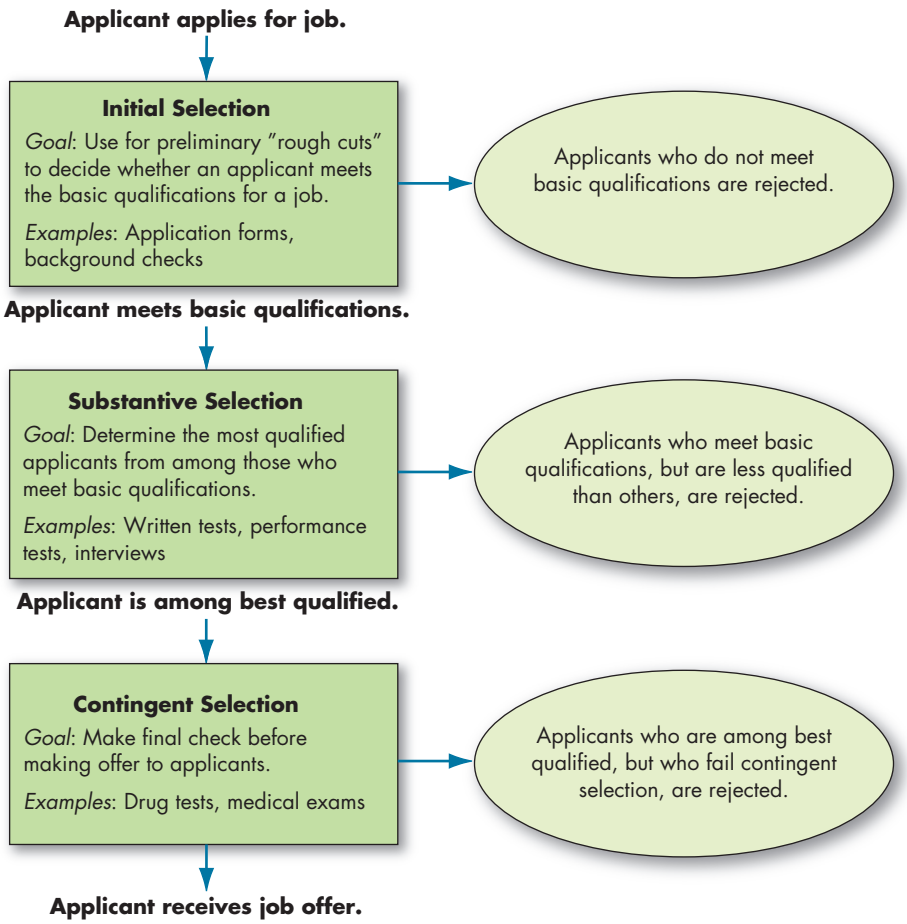
Initial Selection

initial selection Methods used to make preliminary rough cuts of initial applicants to decide whether they meet the basic qualifications for a job.

Initial selection methods are used for preliminary rough cuts to decide whether the applicant meets the basic qualifications for a job. Application forms, résumés, and cover letters are initial selection methods. Background checks are either an initial selection method or a contingent selection method, depending on how the organization handles them. Some organizations prefer to look into an applicant's background right away. Others wait until the applicant is about to be hired, contingent on everything else checking out.

Application Forms You have probably submitted your fair share of applications for jobs, college, or other reasons. By itself, the information submitted on an application form is not a very useful predictor of performance.[48] However, such a form can be a good initial screen (if the information *is, in fact, required* to successfully complete the job responsibilities). For example, there is no sense in interviewing an applicant for a registered nurse position if the applicant does not have the proper credentials (e.g., education, licensure).

Exhibit 17-1 Model of Selection Process in Organizations



Managers must be careful about the questions they ask on applications. Obviously, questions about protected class membership (see the chapter on diversity, equity, and inclusion in organizations) are disallowed. However, other questions also put companies in legal jeopardy. For example, applications should not inquire about marital status, dependents, and family obligations. As a general rule, organizations should only ask about qualifications that can be demonstrated as relevant to the job. Moreover, it is important to realize that legal issues should not be the only thing employers worry about. Applicants who encounter unnecessary or illegal questions on an application may feel alienated and discouraged from completing the application.[49] As such, the organization may miss out on otherwise well-qualified applicants.

Many organizations encourage applicants to apply online. Generally, it takes applicants only a few minutes to complete the application. The application can easily be accessed by the people responsible for making the hiring decision. Most organizations (the Society for Human Resource Management [SHRM] estimates about 85 percent of larger corporations)[50] have a careers page on their websites where prospective employees can search for positions by location or job type and then apply online. With advancements in technology, many HR departments can easily screen applications. Employers can also use an *applicant tracking system (ATS)*. They can use an ATS to take the initial applications and automatically create unique applicant records. Organizations can digitally

manage these records and add to them as the applicants move through the selection process.[51] Taking this a step further, employers can scan applications (and résumés) for keywords and qualifications without physically going through every application—they can even use machine learning (see the introductory chapter) to translate applicants' work experience into predictions of whether they will be successful on the job or turn over.[52]

When you are the candidate, be careful about what you put on your online applications. Although it may be easy to lie on an application, employers can just as easily identify these lies and disqualify you from the job. For instance, prior job seekers have listed the same dates for every job on their application. One claimed they were a CIA counterterrorism expert (while the dates of employment suggested they would have been a child at the time). One even claimed to have studied under Friedrich Nietzsche (who died more than one hundred years before the application was received).[53] Moreover, although some may think including a picture with your application might demonstrate professionalism and improve your chances (and it may be required for some high-security jobs), it is best not to do this.[54] Including a picture may open up the potential for discrimination and unconscious bias. As a result, managers may immediately not consider applications with pictures attached and may view them as unprofessional and distracting. Including a picture may also lead to errors in your ATS record (because the ATS may not be equipped to read pictures).

Résumés and Cover Letters Some positions, mostly management and executive roles, ask for résumés and cover letters along with the application. Résumés and cover letters are often the first exposure these companies have to you as an applicant, and you get to control what goes on them. ATS systems are often equipped to scan and process these documents in the same way they would with normal applications. But beware—just as the ATS may have trouble processing an attached photograph, so, too, can ATS systems have issues with unconventional formatting, fonts, and file formats.

Despite the commonality of the traditional "written" résumés and cover letters, some job seekers are turning toward creating video résumés, working with companies such as Spark Hire to develop video résumés to use in their job searches.[55] Although this is a recent fad, many employers actually do not respond well to them. For instance, one Robert Half survey found that only 3 percent of hiring managers preferred these. In contrast, an overwhelming 78 percent preferred the more traditional "written" format.[56] Moreover, they appear to often harm more than help: It is easier to see through job seekers' impression management tactics via video, and applicants submitting video résumés tend to be viewed more negatively than others.[57] Of course, perhaps the main reason not to use video résumés is to avoid the same discrimination risks as submitting photos with an application.[58]

Can résumés and cover letters be useful in initial selection? The issue with résumés and cover letters is that the information requested is not standardized like in the rest of the application. Independent raters of the same résumé rarely come to an agreement, and job seekers are motivated toward impression management (see the chapter on power and politics) on their résumés and cover letters.[59] Moreover, résumés and cover letters are not immune to disparate impact (see the chapter on diversity, equity, and inclusion in organizations)—hiring managers often subconsciously judge résumés and cover letters differently based on their assumed ethnicity of the applicants (e.g., communicated from their names, education).[60]

Background Checks At least 96 percent of employers conduct at least one type of background check at some point in the hiring process.[61] Although background checks are practically universal today (because of technological advancements)

and conducted for many reasons (e.g., legal compliance, loss prevention, reputation protection), most organizations (86 percent of organizations surveyed by the National Association of Background Screeners [NABS]) do them for one primary reason: to protect employees and customers.[62] And some evidence suggests that they accomplish this goal. Fifty-six percent of background check users reported that their company enjoys more consistent safety and security due to their usage.[63] Seventy-one percent of organizations uncover issues and information about applicants that they otherwise would have missed.[64]

Reference Checks One common form of background check is the *reference check*. In this practice, the hiring manager reaches out to people who have worked with or had contact with the applicant. The problem is that former employers rarely provide useful information. In fact, many managers refuse to participate in the process because they are afraid of being sued for saying something bad about a former employee. (It is also possible to be sued for saying good things about a poor-performing or interpersonally uncivil applicant!)[64] Although many states have passed laws protecting truthful information in reference checks, most employers play it safe in the United States' litigious society. The result is a paradox: Most employers want reference information, but few will give it out. Employers do call personal references for a more candid idea of the applicant. However, as many as 30 percent of hiring managers regularly discover references that were false or misleading.[66] Some organizations have turned to reference-checking software that sends 10-minute surveys to references. This new technology may result in better (more objective) information.[67]

Letters of Recommendation *Letters of recommendation* are another very common form of background check. These are not as useful as they may seem. For instance, in academic contexts, letters of recommendation are only weakly predictive of graduate and medical school performance.[68] Applicants select references who will write positive things about them,[69] so almost all letters of recommendation are positive. In the end, readers either ignore them or read "between the lines" to try to find the hidden meaning. When letters of recommendation do "raise doubt" about the candidate in question, they are often disproportionately brought up for underrepresented groups, potentially leading to disparate treatment or impact concerns (see the chapter on diversity, equity, and inclusion in organizations).

Moreover, letters of recommendation are almost impossible to compare because they differ depending upon who wrote them. Some writers may focus on an individual's educational qualifications, while others may focus on their work experience. One classic study found that letters written by different references about the same person were *less similar* than letters written by the same reference about different people![70]

Informal Social Media "Checks" Many employers perform a general Internet search or a targeted search of social networking sites to "find" background information on a candidate. The legality of this practice has come into question. Still, there is no doubt that many employers include an electronic search to see whether candidates have any history that might make them a dubious choice for employment. For some potential employees, an embarrassing or incriminating photo circulated through Facebook may make it hard to get a job. Recent research found that recruiters' ratings did not predict job performance and turnover beyond normal selection and screening measures (e.g., traditional personality measures) and that job seekers' profiles often contained information that could illegally impact hiring decisions (e.g., protected class information

and non-work-related personal information like political affiliation, marital status).[71] Research on these social media background checks suggests they can lead to biased hiring decisions regarding women and White candidates.[72]

Credit History Checks Some employers check credit histories. A bank hiring tellers, for example, would probably want to know about a candidate's credit history. Still, credit checks are increasingly being used for nonbanking jobs. There is some evidence in favor of this practice. Task performance, organizational citizenship behavior (OCB), and conscientiousness (which is a predictor of job performance; see the chapter on personality and individual differences) were predicted by credit scores.[73] However, the consistency of the links is questioned—research also found that some members of underrepresented groups, such as Black job seekers, can be adversely impacted by the use of credit scores in selection. In contrast, age and educational attainment were positively related.[74] Because of discrimination concerns and the invasive nature of credit checks, employers must be sure there is a need for them (and should be sure to comply with the provisions of the Fair Credit Reporting Act [FCRA]).

Criminal Background Checks Some employers conduct criminal background checks. Currently, 73.5 million U.S. adults (roughly one in three) have criminal records.[75] For many with criminal records, it is difficult or impossible to find work,[76] even during the COVID-19 pandemic when many service organizations were extremely short-staffed.[77] The U.S. Equal Employment Opportunity Commission (EEOC), the federal agency responsible for enforcing employment discrimination laws, states that candidates cannot be denied employment based only on the findings of background checks (i.e., *a blanket policy of no convictions*) and experts point out that the checks are often inaccurate anyway.

To complicate matters further, a criminal conviction history can legally be used for rejection only if a violation relates to the job or is federally mandated (an embezzler could be disqualified for jobs in finance [a related occupation] or as a TSA agent [a federally restricted position], but not in, say, the marketing field),[77] convictions (and not arrests) are considered, and the employer considered alternatives to a background check with less adverse impact.[79] How can employers navigate the nebulous nature of criminal background checks? Giving applicants a chance to explain should be a best practice here (and may even be legally required in some instances). When given a chance to explain a conviction, many applicants can redeem themselves in the eyes of recruiters. Notably, some companies deliberately set out to hire applicants who would not pass background checks, like those with criminal backgrounds.[80] These organizations value second chances in their cultures and report that many of these workers become valuable contributors to their organizations and society.

substantive selection Methods used to determine the most qualified applicants from among those who meet the basic qualifications.

contingent selection Methods used as final checks for candidates who passed substantive selection before giving them an employment offer.

Substantive and Contingent Selection

17-3 Identify the most useful substantive selection methods.

If an applicant passes the initial selection process, they next pass through substantive selection. **Substantive selection** methods are at the heart of the selection process and include written tests, performance-simulation tests, and interviews. The purpose of substantive selection is to determine the most qualified applicants from those who meet basic qualifications. We will discuss these and **contingent selection** methods, which are usually issued to candidates who pass the substantive tests but are offered employment only if they pass final checks.

Written Tests

Long popular as selection methods, written employment tests—traditionally called paper-and-pencil tests, although most are now available online—declined in use between the late 1960s and mid-1980s, especially in the United States. They were frequently characterized as discriminatory, and many organizations had not validated them as job-related. Since then, however, there has been a resurgence. Today, many organizations have at least considered using one or more tests. SHRM reports that up to one-third of thousands of surveyed organizations use written tests in their selection procedures.[81] Managers recognize that valid tests can help predict who will be successful on the job.[82] Applicants, however, tend to view written tests as less valid and fair than interviews or performance tests (discussed later in this section).[83] Typical tests include (1) intelligence or cognitive ability tests, (2) personality tests, and (3) integrity tests.

Intelligence or Cognitive Ability Tests Tests of intellectual ability/cognitive ability/intelligence (the terms are sometimes used interchangeably), spatial and mechanical ability, perceptual accuracy, and motor ability (see the chapter on personality and individual differences) have long proven valid predictors for the performance of many skilled, semiskilled, and unskilled operative jobs.[84] Overall, intelligence tests have proven to be particularly good predictors for jobs that include cognitively complex tasks (e.g., computer programming and software engineers). Many experts say intelligence tests are the *single best* selection measure across jobs and that they are at least as valid in the European Union (EU) as in the United States.[85] While cognitive ability tests have long been considered to measure a single, unified cognitive capacity, some recent work suggests that they may be useful tests for different specific abilities depending on the job requirements.[85] For example, differentiating mathematical, verbal, and technical abilities in hiring processes may lead to better predictions of job performance than relying on just one overall cognitive ability score. If cognitive ability tests are so predictive of performance, why do only 16 to 18 percent of organizations surveyed by SHRM use them?[87] The answer lies in their disparate impact (see the chapter on diversity, equity, and inclusion in organizations). Of all the substantive selection methods we discuss in this section, cognitive ability tests lead to the most disparate impact.[88]

Personality Tests Personality tests are inexpensive and simple to administer (see the chapter on personality and individual differences for more in-depth descriptions). Their use has grown over the years. According to SHRM, personality tests are most frequently given to executives and middle managers. However, they also tend to be administered to individual contributors and hourly employees, albeit at a lower rate.[89] In general, researchers view personality tests positively, who remark that traits such as conscientiousness and extroversion predict performance in organizations.

Moreover, concerns about applicants faking responses remain. It is fairly easy to claim to be hard-working, motivated, and dependable when asked in a job application setting, even if that is not accurate and partly because applicants are not always aware they are faking.[90] Comparing self-reported personality to observer-rated personality found that observer ratings can predict job performance and other behaviors, suggesting hiring managers seek out people who know the applicants well to fill out personality tests on their behalf.[90]

Integrity Tests As ethical problems in organizations have increased, integrity tests have gained popularity. These tests assess a candidate's propensity to behave (un)ethically.[92] They have proven to be powerful alternatives to inaccurate



At this Sarku Japan fast-food restaurant, employees applying for management positions must take written tests as part of the company's substantive selection process. Written tests for intelligence, integrity, personality, and interests are popular selection methods that help predict which applicants will be successful on the job.

Source: Michael S. Williamson/*The Washington Post*/Getty Images

integrity measures, such as polygraphs, in predicting unethical employee behaviors such as theft.[92] Integrity tests can potentially predict job performance (as measured as objectively as possible by supervisors) and of the potential for theft, discipline problems, and excessive absenteeism,[93] with little disparate impact.[94] However, the many available tests do not all predict job performance outcomes equally well. In practice, integrity tests may not be as accurate as we might hope, may be easily faked depending upon the measure, and applicants react negatively to them, especially when they are misclassified or stigmatized as a result.[95] Managers must be careful to choose integrity tests carefully and cautiously, use these tests only if there is a business necessity, and ensure that they link the need for an integrity test to the job requirements (e.g., handling sensitive information).

Performance-Simulation Tests

What better way to determine whether applicants can do a job successfully than by having them do it? That is precisely the logic of performance-simulation tests. Although they are more complicated to develop and administer than standardized tests, performance-simulation tests tend to not only have the highest validity (because they essentially duplicate the job), but they have higher *face validity* as well (e.g., whether applicants perceive the measures to be accurate). Performance simulations are commonly implemented through work samples, assessment centers, and situational judgment tests.

work sample tests Hands-on simulations of part or all of the work that applicants for routine jobs must perform.

Work Sample Tests **Work sample tests** are hands-on simulations of part or all the work that applicants to the job routinely must perform. Applicants' performance on each element of the work sample measures their capability to perform a job with more specificity than written aptitude and personality tests, which are targeted more toward competencies that predict performance (e.g., traits and abilities).[97] Work samples are widely used to hire skilled workers such as welders, machinists, carpenters, and electricians. Work sample tests are increasingly used for all levels of employment.[98] However, they differ in their level of *fidelity*. High-fidelity work samples seek to duplicate the task itself. But what if it is unrealistic,

unfeasible, or even dangerous to reproduce the task? Lower-fidelity work samples, such as virtual reality simulations, enable the organization to provide similar work samples without the dangers associated with reproducing the task.[99]

Assessment Centers A more elaborate set of performance-simulation tests, typically designed to evaluate a candidate's managerial potential, is administered in **assessment centers**.[100] Line executives, supervisors, and/or trained psychologists evaluate candidates as they go through one to several days of exercises that simulate real problems they would confront on the job.[101] For example, a candidate might be required to role-play a manager who must decide how to respond to ten memos in an in-basket within two hours. Assessment centers are good predictors of performance; however, some debate their validity because ratings may be confounded by many factors.[102] For example, the results of assessment center exercises may be affected by whether it is easy for applicants to guess the traits needed to perform well or by the disposition and initial impressions of role players.[103]

assessment centers Off-site locations where candidates are given a set of performance-simulation tests designed to evaluate their managerial potential.

Situational Judgment Tests To reduce the costs of job simulations, many organizations have started to use **situational judgment tests**, which ask applicants how they would perform in a variety of job situations and then compare their answers to the answers of high-performing employees.[104] For example, an applicant to a call center might be presented with a fictitious transcript of an angry customer and then asked to choose the best response from a series of options. Ultimately, the lower cost of the situational judgment test may make it a better choice for some organizations than a more elaborate work sample or assessment center experience. Moreover, they tend to have moderate validity and relatively low disparate impact, making them an attractive substantive method choice.[105] Coaching can improve scores on these tests, though, and research has demonstrated that applicants can identify the correct answers even if the situation is masked or removed from the assessment.[106] In other words, an applicant would choose the correct answer to the angry customer situation described earlier, even without the transcript. These issues raise questions about whether they reflect true judgment or merely good test preparation.[107]

situational judgment tests Substantive selection tests that ask applicants how they would perform in a variety of job situations; the answers are then compared to the answers of high-performing employees.

Interviews

Of all the selection methods that organizations worldwide use to differentiate candidates, the interview has always been standard practice. It also tends to have a disproportionate amount of influence. Overreliance on interviews is problematic because extensive evidence shows that impression management techniques (see the chapter on power and politics) such as self-promotion have a strong effect on interviewer preferences even when the displayed traits are unrelated to the job.[108] Conversely, the candidate who performs poorly in the employment interview is likely to be cut from the applicant pool regardless of experience, test scores, or letters of recommendation. And unfortunately, candidates can be rated lower for something as trivial as a blemish on their faces, one study found.[109]

In practice, most organizations use interviews for many reasons. Companies such as Southwest Airlines, Disney, Bank of America, Microsoft, and Procter & Gamble use interviews to assess applicant–organization fit. In addition to evaluating specific, job-related skills, managers look at personality characteristics and personal values to find individuals who fit the organization's culture and image. Some companies also use job interviews as a recruiting tool, trying to "sell" applicants on the value of the job and organization. This strategy may sometimes be necessary because of a tight labor market, but it may also be problematic. One study showed that interviewers who were trying to promote the organization



Arcadio Cruz (left) uses a structured interview approach in gathering information from job applicants for positions at Orchard Hardware Supply store in Los Angeles. Questions asked in structured interviews are objective and standardized for all applicants and encourage open-ended responses.

Source: Patrick Fallon/Bloomberg/Getty Images

during interviews were significantly worse at identifying applicant qualifications than those who focused exclusively on assessing candidate qualifications.[110]

unstructured interviews Short, casual interviews made up of improvised questions.

Interviews are either structured or unstructured. The popular **unstructured interview**—short, casual, and made up of improvised questions—is simply not a very effective selection method.[111] The data it gathers is typically biased and often only modestly related to future job performance. Still, managers are reluctant to use **structured interviews**—planned interviews designed to gather job-related information—in place of their favorite questions,[112] such as "If you could be any animal, what would you be, and why?" Structured interviews limit subjectivity as much as possible and therefore, can provide more reliable responses. For instance, applicants in one structured interview process were asked questions that gave the interviewer a better understanding of their personalities. In one interview question (designed to reflect extroversion), interviewers asked: "Sometimes you meet a lot of new people. Think of a situation where you participated in a one or two-day training… workshop and where you did not know the other participants… Please describe exactly how you perceived this situation and what you did in this situation to interact with the other participants."[113] This is an excellent start in that the question prompts open-ended responses and is standardized for all candidates.[114]

structured interviews Planned interviews designed to gather job-related information.

Contingent Selection Tests

If applicants pass the substantive selection methods, they are ready to be hired, contingent on final checks. One common contingent check is a drug test. Publix grocery stores make tentative offers to applicants contingent on their passing a drug test,[115] as do many other organizations.

Drug Testing Drug testing is controversial. Many applicants think testing without reasonable suspicion is invasive or unfair. They should be tested on job-performance factors, not lifestyle choices that may not be relevant. Employers might counter that drug use and abuse are extremely costly, not just in financial terms but also in considering people's safety. In fact, research has revealed that the average drug user is 3.6 times more likely to be involved

in an accident, receives three times the amount of sick pay and benefits, is five times more likely to make a workers' compensation claim, and misses ten times more workdays than those who do not use drugs. In the United States, employers have the law on their side.[116] Moreover, drug use involves increased costs of $81 billion annually in lost productivity, absenteeism, and increased health care costs.[117] The Supreme Court has concluded that drug tests are "minimally invasive" selection procedures that, as a rule, do not violate individuals' rights.

But are drug tests accurate? Have they been shown to lead to the improvement of hiring? First of all, many contest the accuracy of drug tests. Some HR professionals refer to them as "obsolete" outside occupations that require public trust.[118] Of the thousands and thousands of people who take urine drug tests in the United States, the positivity rate has been consistently below 6 percent since 1996.[119] This suggests that drug tests may be relatively insensitive and unreliable to measure drug usage in the workforce or that applicants can easily "game" the test (dilute, alter, or substitute samples).

Moreover, there is not much research on whether drug tests result in the intended outcomes. However, one large-scale study at the U.S. Postal Service found that its drug testing and screening program reduced absenteeism and turnover but did not affect accidents or injuries.[120] Given the lack of validity evidence and poor accuracy evidence, many maintain that drug testing does not accomplish what it was intended to accomplish. Although not a common approach, some researchers suggested that instead of using invasive drug testing, hiring managers could administer personality tests geared toward a propensity for drug abuse and other risky behavior (e.g., thrill-seeking, unethical behavior rationalization, tolerating others' unethical behavior).[121]

Medical Examinations Under the Americans with Disabilities Act (ADA; described in a later section) U.S. firms may not require employees to pass a medical exam before a job offer is made. However, they can conduct medical exams *after* making a contingent offer—but only to determine whether an applicant is physically or mentally able to do the job. Employers also sometimes use medical exams to find out whether and how they can accommodate employees with disabilities. For jobs requiring exposure to heavy physical or psychological demands, such as air traffic controllers or firefighters, medical exams may be an important indicator of the ability to perform.[122] However, like drug testing, the validity of these types of exams is not very compelling. Even more worrisome, it is difficult to establish that a medical examination is necessary and job-related.

Therefore, hiring managers who consider using medical examinations as a contingent method should follow medical standards and focus only on the exact health conditions proven to adversely affect performance. As an example, truck-driving and carrier companies are required by the U.S. Department of Transportation (DOT) to administer contingent medical examinations. However, in doing so, they must also comply with the EEOC and ADA. Carriers can reduce the likelihood of litigation by focusing directly on specific medical conditions, such as hearing and visual conditions, that are directly related to driving success and safety instead of conducting broad "physicals."[123]

Training and Development

17-4 Compare the main types of training.

Competent employees do not remain competent forever. Competence deteriorates and can become obsolete, and new skills need to be learned. That is why corporations in the United States spend over $70 billion annually on

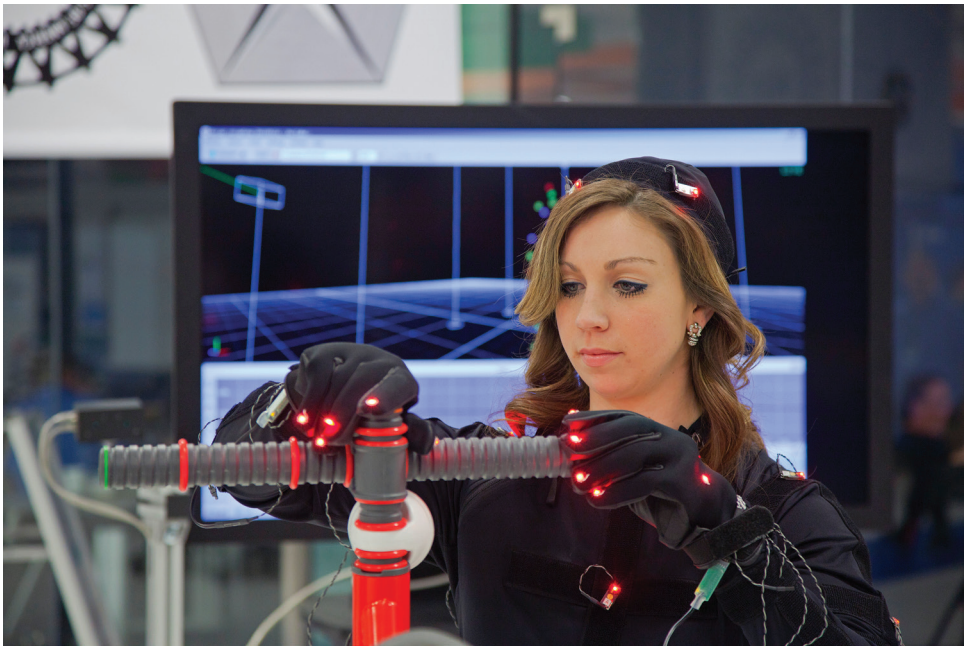
transfer of training Utilizing the knowledge, skills, and abilities learned from training on the job.

training.[124] Organizations from retail, wholesale, and customer service industries dedicate over $10 million annually to training in their budgets.[125] The number one goal of training is for it to *transfer*. This **transfer of training** refers to utilizing the knowledge, skills, and abilities learned from training on the job.[126] What good is dedicating millions and billions of dollars to training if no one puts it to use? When training is done well, it can help boost the organization's human capital and even the employees' career competencies, transferrable to *future jobs*.[127]

What does training *look like? On-the-job training* methods include job rotation, apprenticeships, and understudy assignments. U.S. companies have been increasingly using longer-term job rotations to *cross-train* employees and to foster collaboration.[128] For instance, companies like ADP and Verizon offer their employees the opportunity to learn about different jobs and aspects of the business processes through job rotation.[129] However, on-the-job training methods often disrupt the flow of work or would be better performed removed from the work context.

Therefore, organizations also invest in *off-the-job training*. Most of the expenditures we cited earlier for training are largely spent on this formal, off-the-job variety, the most popular method being live workshops or sessions (or multiple workshops organized within training programs). But it also encompasses self-directed training, e-learning, mobile learning, webinars, podcasts, and massively open online courses (MOOCs).

Larger organizations are increasingly building corporate universities to house formal training programs and have been doing so since the 1960s (although many perhaps incorrectly assume they are a recent development!).[130] For example, JetBlue University in Orlando, Florida, trains airline pilots and supporting flight crews on the policies, practices, and procedures all in one place, simulating real-world flight scenarios (which would not be acceptable to hold on the job).[131] The formal instruction given in the corporate university classes is often supplemented with informal online training or informal experiential training.[132]



Off-the-job training at Chrysler's World Class Manufacturing Academy includes hands-on and classroom learning for engineers and plant employees that teaches them how to reduce waste and increase productivity and quality. Shown here is an employee using a human motion capture system to learn how to analyze the movements of assembly-line workers.

Source: Jim West/Alamy Stock Photo

Training Content

Training can include everything from teaching employees simple machine operation, improving executive leadership, helping employees become more accepting of diversity, and increasing work–life balance (discussed later in the chapter).[132] Throughout the text, we have described several different training foci, from leadership to diversity to ethics. The goal of training is for employees to learn something and enhance their knowledge by acquiring knowledge, skills, abilities, and other characteristics the organization can draw on as human capital resources (discussed earlier).[134]

Although some do not make this distinction, *training* is different from *education*. Education primarily focuses on acquiring *knowledge,* such as facts and figures necessary to do a job or the steps in a complicated process. Training, on the other hand, spans beyond merely acquiring knowledge toward application. Training is more concerned with building skills, developing abilities, and even acquiring competencies like adaptability, emotional competence, and leadership.

As a student, you have been working toward acquiring many basic skills (e.g., reading, math, problem-solving, critical thinking) that may be transferable to your career. On the other hand, most training that organizations offer are focused on *technical skills* (e.g., learning how to effectively use new software, programs, applications; learning how to code in various programming languages) or *soft skills* (e.g., managing and regulating one's emotions effectively; building relationships; communicating clearly and efficiently). One area of soft skills that is particularly important in the workplace is ethics training, which focuses on recognizing moral issues, regulating moral emotions, considering different perspectives, and acting ethically by treating others with respect and civility. For instance, holding directed conversations about ethics and supporting the reduction of incivility on an ongoing basis is one form of training. Following this intervention, civility, respect, job satisfaction, and trust increased, while incivility, cynicism, and absences decreased.[135]

Training Methods

Historically, *training* meant "formal training," planned in advance and following a structured format. HR departments play a big role in this training. Formal training and development programs are still very much in use. Still, much of the workplace learning occurs in *informal training*—unstructured, unplanned, and easily adapted for situations and individuals. In reality, most informal training is nothing other than employees helping each other, sharing information, and solving work-related problems together. Regardless, both formal and informal training have important implications for how training is designed, structured, and implemented.

Instructional System Design The instructional system design (ISD) approach views training very formally and primarily centers on the role of the training developer and trainer in facilitating employee learning. The ISD approach generally follows the following procedure, also known as the ADDIE model:[136]

1. *Analyze:* Establish what skills, abilities, or other characteristics needs to be trained. Establish what goals should be accomplished by the training. Define who the trainees would be and what they would need to be successful.
2. *Design:* Establish what training success and failure would look like. Select instructional strategies to meet learning objectives and decide how trainees receive feedback on their performance.
3. *Develop:* Establish where training will occur and what will be needed (e.g., media, applications, other resources) to ensure its success.

4. *Implement:* Engage trainees in the training session or program. Provide opportunities for transfer and encourage transfer following training.
5. *Evaluation:* Determine whether the system is successful in the context of the organization (e.g., how much money saved or gained, accidents avoided; how many people trained). Use the information to inform revisions of the training session or program.

Although ISD is an extremely useful organizing framework for designing and implementing formal training in organizations that enjoys widespread use,[137] it is often criticized for falling short of focusing on the most important person in the training process: the trainee.[138]

Active Learning Addressing the limitations of the more instructor-oriented ISD model, active learning focuses primarily on the trainee or learner. Through encouraging trainees to actively engage and experiment with the training content, trainees can build confidence in their skills, abilities, and competencies, which will increase the likelihood of transfer.[139] Active learning primarily consists of three basic tenets: (1) encouraging exploration and reflection, (2) normalizing errors and mistakes, and (3) controlling emotions. For example, an employee learning a new programming language may build some basic programs to accomplish basic tasks, learn from errors (or willfully commit them to see what would happen), and learn to manage the frustrations with making mistakes or not being an expert right away.[140]

Is active learning effective? Recent research on the method suggest that active learning is reacted to positively by trainees, leads to knowledge and skill acquisition, and also facilitates transfer performance.[141] Why? It may be because trainee motivation plays a key role in training success, influencing whether trainees learn the material and apply it, as well as how trainees feel about it.[142] As trainees become more actively engaged with the training content and move away from being passive recipients their learning increases.[143]

However, trainees may find it frustrating if they are given all of the materials to learn and told to "get to it" without any direction. Many trainees benefit from working with other people (e.g., trainers or peers) who can offer feedback, guide them toward learning, support their incites, and offer explanations when necessary.[144] Moreover, active learning appears to be more effective when used in moderation and for learning cognitive skills (rather than knowledge or facts).[145] It also may not work for everyone—trainees who are motivated to learn the content will likely be more successful than those who just want to avoid failure or otherwise prove their worth (the sting of making mistakes or errors may be hard for them to handle).[146]

Interactive Learning Interactive learning builds upon active learning to suggest that learning is a social construction created from interacting people (e.g., trainers–trainees, trainees–trainees).[147] Therefore, training methods should create conditions not only in which the learner is actively engaging in training content, but doing so in a social context with other people.[147] For instance, one study of thousands of students across eighteen high schools showed that positive teacher–student relationships mattered in facilitating student engagement with the content. If students have more negative than positive relationships with teachers, they tend to be less engaged with the content.[149]

Research in the workplace suggests that the relationships between people matter for training outcomes in organizations. For instance, one study of over ten thousand teachers found that the learner's satisfaction with training was more attributable to the trainer than the course's content.[150] Moreover, transfer of training is inevitably dependent upon the culture and climate of the

organization. If you attend ethics training but everyone in your workplace discourages you from taking it seriously, rewards you for ignoring the training, or even ostracizes you for following through with what you learn, the skills you learn will not likely transfer. Therefore, interactive learning may be important as teams and units emerge from the training together on the same page. For example, research on city council workers participating in safety training are more likely to transfer if everyone—supervisors, coworkers, and safety professionals alike—take responsibility for what was learned.[151] Training developers can encourage interactive participation even after training through collective group reflections and debriefs (e.g., *after-action reviews* [AARs]).[152]

E-Learning The fastest-growing training method is computer-based training, or e-training or e-learning.[153] E-learning systems emphasize learner control over the pace and content of instruction, allow e-learners to interact through online communities, and incorporate other techniques such as simulations and group discussions.[154] Therefore, e-learning approaches seek to emphasize the best elements of active and interactive learning in a boundless, electronic environment.[155] Computer-based training that lets learners actively participate in exercises and quizzes can be more effective than traditional classroom instruction.[156] Employers can improve computer-based training by providing learners with regular prompts to set goals for learning, effective study strategies, and progress measurements toward the learning goals.[157] Organizations are exploring delivering e-training through microlessons, on-the-spot tips, and learning games on mobile devices.[158]

Evaluating Effectiveness

The *effectiveness* of a training program can refer to the level of trainee satisfaction, the amount trainees learn, the extent to which they transfer the learned material to their jobs, and/or the company's financial return on investments in training.[159] These results are not always related. Some people who have a positive experience in an upbeat, fun class learn very little; some who learn a great deal have difficulty figuring out how to use their knowledge at work; and changes in employee behavior are sometimes not large enough to justify the expense of training. This means rigorous measurement of multiple training outcomes should be part of every training effort.

Is there general evidence related to training, development practices, and organizational performance? A variety of studies show that investments in on-the-job training lead to increases in productivity of significantly greater value than the cost of providing the training.[160] Similarly, research indicated that cross-cultural training was effective in raising performance when the training was done after the person was working in a new country but not when the training was conducted before departure to a new country.[160] The climate for employee development has also been related to business unit performance.[161] For example, one study of 260 companies found that training expenditures were positively related to corporate innovation.[163] Overall, most studies have shown that investments in training can indeed have positive effects at the aggregate level.

Performance Management

17-5 List the methods of performance management.

Performance management (also referred to as performance appraisal and performance evaluation) is more often than not something designed and executed poorly in organizations. Too often managers conduct an annual performance appraisal that terrifies employees, provides them with little to no actionable

feedback, is informed by subjective impressions, and leaves everyone feeling tense, competitive, anxious, and worse off than if one was never conducted in the first place.[164]

The Internet is riddled with performance appraisal horror stories. For instance, one employee had a complaint attached to their appraisal from a year ago. The problem is that this employee never heard the complaint and did not even know what it was about. After inquiring with the supervisor, the supervisor said they did not record what it was and not to put too much stock in it because no one cared about what the complainant had to say anyway. But still, the supervisor put it on the permanent record.[165] As another example, many women report omnibus, sexist comments on their performance appraisals that have little to do with their job performance. For instance, one employee encountered comments like "somebody said they didn't like your facial expression" and "you need to be more direct" (followed with a "you need to be less direct" once the employee actually made changes).[166] Indeed, a large body of research suggests that prejudicial stereotypes filter into performance evaluations.[167]

However, if done correctly, performance management can be a positive, developmental force in organizations. *Performance management* should be a continuous process where HR managers identify, measure, and develop both individual and team performance that is aligned with the strategic goals of the organization.[168] In essence, performance management focuses on three primary areas (described in the introductory chapter): job performance, organizational citizenship behavior (OCB), and counterproductive work behavior (CWB). Most managers believe that good performance means doing well on the first two dimensions and avoiding the third.[169] A person who does core job tasks very well but is rude and aggressive toward coworkers is not going to be considered a good employee in most organizations, and the most pleasant and upbeat worker who cannot do the main job tasks well is not going to be a good employee either. In this section we show how the choice of a performance evaluation system and the way it is administered can influence employee behavior.

Performance evaluation serves a number of purposes. One is to help management make general *human resources decisions* about promotions, transfers, and terminations. Evaluations also *identify training and development needs*. They *pinpoint employee skills and competencies* for which remedial programs can be developed. Finally, they *provide feedback to employees* on how the organization views their performance and are often the *basis for reward allocations*, including merit pay increases.

What Do We Evaluate?

The criteria that management chooses to evaluate has a major influence on what employees do. The three most popular sets of criteria are individual task outcomes, behaviors, and traits.

Individual Task Outcomes Sometimes, management evaluates performance based on task outcomes, such as quantity produced, scrap generated, and cost per unit of production for a plant manager, or on overall sales volume in the territory, dollar increase in sales, and number of new accounts established for a salesperson. However, evaluating performance in this way can be incredibly unmotivating if there is a disconnect between employee behavior and task outcomes or if task outcomes are governed by forces in the context beyond the employees' control.

Recall expectancy theory from the chapter on motivation concepts—when there is a breakdown between effort and performance or between performance and outcomes, motivation can decrease. For instance, imagine if you worked as a salesperson

for a company in Alaska that sold air-conditioning units. (In Anchorage, the average summer temperature ranges from 55 to 78 degrees Fahrenheit.)[170] Many people in Alaska opt not to have air conditioners given the climate (although they probably have heating systems!). How would you feel if you were evaluated on how many air-conditioning units you sold and not on your performance behaviors? Research suggests that the context an individual or team operates in has major implications for its performance and how it fares in performance management systems.[171]

Behaviors It is difficult to attribute specific outcomes to the actions of employees in advisory or support positions whose work assignments are part of a group effort. We may readily evaluate the group's performance but if it is hard to identify the contribution of each group member management will often evaluate the employee's behavior. A manager might be evaluated on promptness in submitting monthly reports or leadership style and a salesperson on average number of contact calls made per day or helpfulness toward other sales representatives.

Measured behaviors need not be limited to those directly related to individual productivity. Helping others, making suggestions for improvements, volunteering for extra duties, and other OCBs make work groups and organizations more effective and often are incorporated into evaluations of employee performance.

Traits Having a good attitude, showing confidence, being dependable, staying busy, or possessing a wealth of experience can be desirable in the workplace, but it is important to remember that these traits may not be highly correlated with positive task outcomes. Moreover, some personality traits may actively distort or upwardly manage supervisors' perceptions of the employee. For instance, supervisors often rate employees on how well they take personal initiative or have proactive personality traits. However, research demonstrates that politically skilled employees are better able to recognize and capitalize on opportunities to "showcase" their initiative to their evaluating supervisors.[172] Worse yet, they may not take the initiative or engage in proactive behaviors when their supervisor is not watching. Unfortunately, we cannot ignore the reality that organizations still use such traits to assess job performance.



Behaviors such as helping children, assisting coworkers, and building trusting relationships with parents are important elements in evaluating the performance of employees working at this child day care center. These subjective factors add to the center's reputation as a high-quality, safe, and respectful organization.

Source: Bob Ebbesen/Alamy Stock Photo

Who Should Do the Evaluating?

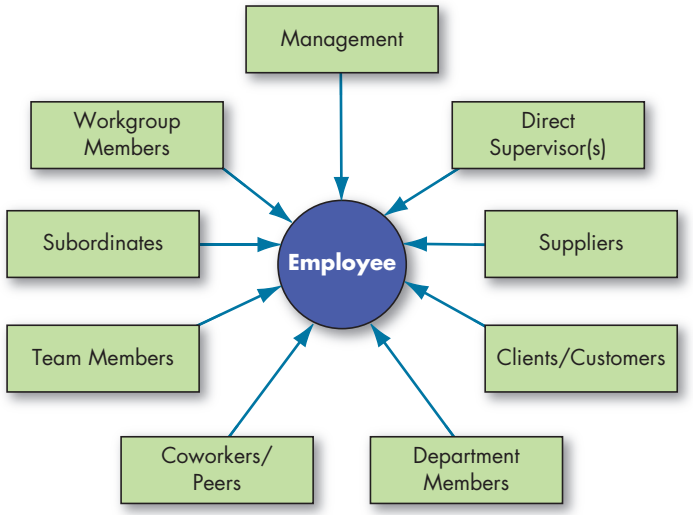
Who should evaluate an employee's performance? By tradition, the task has fallen to managers because they are held responsible for their employees' performance. But others may do the job better, particularly with the help of HR departments. With many of today's organizations using self-managed teams, telecommuting, and other formats that distance bosses from employees, the immediate superior may not be the most reliable judge of an employee's performance. Peers and even subordinates are being asked to take part in the process and employees are participating in their own evaluations. As you might expect, self-evaluations often suffer from overinflated assessment and self-serving bias and they seldom agree with supervisor's ratings.[173] They are probably better suited to developmental than evaluative purposes.

In most situations, it is highly advisable to use multiple sources of ratings; any individual performance rating may say as much about the rater as about the person being evaluated. By averaging across raters, we can obtain a more reliable, unbiased, and accurate performance evaluation. Another popular approach to performance evaluation is the use of 360-degree evaluations.[174] These provide performance feedback from the employee's full circle of daily contacts, from subordinates to customers, to bosses, to peers (see Exhibit 17-2). The number of appraisals can be as few as three or four or as many as 25; most organizations collect five to ten per employee.

What is the appeal of the 360-degree appraisal? By relying on feedback from people who know the employee well organizations hope to give everyone a sense of participation in the review process, increase employee accountability, and obtain more accurate readings on employee performance. Moreover, the context of each relationship matters for performance ratings—therefore, it is important to obtain ratings from multiple people who have worked with the target individual in a number of contexts and settings.[175]

However, evidence on its effectiveness is mixed.[176] The 360-degree evaluation provides employees with a wider perspective on their performance, but many organizations do not spend the time to train evaluators in giving constructive criticism. Some organizations allow employees to choose the peers and

Exhibit 17-2 360-Degree Evaluation



subordinates who evaluate them, which can artificially inflate positive feedback. There is a risk of giving too much weight to people who do not know much about the employee's actual performance. It is also difficult to reconcile disagreements between rater groups. There is clear evidence that peers tend to give much more lenient ratings than supervisors or subordinates and also to make more errors in appraising performance. These evaluations may thus supplement an understanding of the consistency of an employee but should not supplant objective evaluations of performance.

Methods of Performance Evaluation

We have discussed *what* we evaluate and *who* should do the evaluating. Now we ask: "*How* do we evaluate an employee's performance? What are the specific techniques for evaluation?"

Written Comments Probably the simplest method is to write a narrative describing an employee's strengths, weaknesses, past performance, potential, and suggestions for improvement. The written comment requires no complex forms or extensive training to complete. But a written appraisal may be determined as much by the evaluator's writing skill as by the employee's actual level of performance. It is also difficult to compare comments for different employees (or for the same employees written by different managers) without a standardized scoring key. However, advancements in artificial intelligence and machine learning are enabling HR managers to score these written comments quickly, easily, and accurately.[177]

Critical Incidents **Critical incidents** focus the evaluator's attention on the difference between executing a job effectively and executing it ineffectively. The appraiser describes what the employee did that was especially effective or ineffective in a situation, citing only specific behaviors. A list of such critical incidents provide a rich set of examples to show the employee desirable behaviors that call for improvement. These critical incidents can thus serve as anchors defining what excellent performance and unsatisfactory performance looks like.

critical incidents A way of evaluating an employee's behaviors that are key in making the difference between executing a job effectively and executing it ineffectively.

Graphic Rating Scales One of the oldest and most popular methods of evaluation is the **graphic rating scale**. The evaluator goes through a set of performance factors—such as quantity and quality of work, depth of knowledge, cooperation, attendance, and initiative—and rates each on incremental scales. The scales may specify, say, five points, where *job knowledge* might be rated 1 ("is poorly informed about work duties") to 5 ("has complete mastery of all phases of the job"). Although they do not provide the depth of information that comments or critical incidents do, graphic rating scales are less time consuming to develop and administer and they allow for quantitative analysis and comparison.

graphic rating scale An evaluation method in which the evaluator rates performance factors on an incremental scale.

Behaviorally Anchored Rating Scales **Behaviorally anchored rating scales (BARS)** combine major elements from the critical incident and graphic rating scale approaches. The appraiser rates employees on items along a continuum, but the items are examples of actual behavior on the job rather than general descriptions or traits. To develop the BARS, participants first contribute specific illustrations of effective and ineffective behavior, which are translated into a set of performance dimensions with varying levels of quality.

behaviorally anchored rating scales (BARS) Scales that combine major elements from the critical incident and graphic rating scale approaches. The appraiser rates employees based on items along a continuum, but the points are examples of actual behavior on the given job rather than general descriptions or traits.

Electronic Performance Monitoring (EPM) Some organizations utilize electronic performance monitoring (EPM) to capture objective indicators of employees' performance while on the job. This captures attentional metrics, such as

how long employees stay logged into collaboration programs (e.g., Microsoft Teams), how many reports they file, and whether they "cyberloaf" (e.g., visiting shopping websites rather than working). Although many organizations use EPM for performance appraisal, they also may use EPM to protect against legal liability (e.g., ensure safety), to provide developmental feedback on how to perform better, or, sometimes, without clear direction (e.g., for purely authoritarian purposes). In general, employees tend to react negatively to EPM, especially when it is real-time, not transparent (e.g., the employer is secretive), and invasive (e.g., collects too much data without reason).[177]

forced comparison Method of performance evaluation where an employee's performance is made in explicit comparison to others (e.g., an employee may rank third out of ten employees in their work unit).

group order ranking An evaluation method that places employees into a particular classification such as quartiles.

individual ranking An evaluation method that rank-orders employees from best to worst.

Forced Comparisons **Forced comparisons** evaluate one individual's performance against the performance of another or others. It is a relative rather than an absolute assessment. The two most popular comparisons are group order ranking and individual ranking.

Group order ranking requires the evaluator to place employees into a particular classification such as the top one-fifth or the second one-fifth. If a rater has 20 employees, only four can be in the top fifth, so, of course, four must also be relegated to the bottom fifth. This method is often used in recommending students to graduate schools.

The **individual ranking** approach rank-orders employees from best to worst. If the manager is required to appraise 30 employees, the difference between the first and second employee is assumed to be the same as that between the twenty-first and twenty-second. Some employees may be closely grouped, but no ties are permitted. The result is a clear ordering from the highest performer to the lowest.

Not surprisingly, employees react negatively to relative performance evaluations. Employees consider performance management systems to be much fairer when they are relative to how they have performed in the past, rather than how they are performing relative to their peers.[179] One company that has been known to use these types of relative methods is Amazon. Past managers at Amazon have described how they are directed to use group order ranking to determine how well their employees are faring across their entire team or division to determine HR systems and remedial plans (e.g., Amazon's *Focus* initiative). Although some have described "hire to fire" practices, where managers hire people who they know they will eventually fire (by hiring people they know they would rank in the bottom portion of the distribution), Amazon representatives deny this claim. Regardless, the managers who have come forward about these ranking practices describe immense amounts of pressure surrounding the practices, and the decisions are not easy, especially when everyone is a top performer. As one former manager noted, "Whomever is the least best has to go… it's like firing someone who got an A- when the rest of the class got A's."[180]

Improving Performance Evaluations

The performance evaluation process is a potential minefield. Evaluators can unconsciously inflate evaluations (positive leniency), understate performance (negative leniency), or allow the assessment of one characteristic to unduly influence the assessment of others (the halo error). Some appraisers bias their evaluations by unconsciously favoring people who have qualities and traits similar to their own (the similarity error). For example, introverts may rate extroverts lower on performance. And some evaluators see the evaluation process as a political opportunity to overtly reward or punish employees they like or dislike. One review on performance appraisals demonstrates that many managers deliberately distort performance ratings in order to maintain a positive

relationship with their subordinates or to achieve a positive image of themselves by showing that all their employees are performing well.[181] Although no protections *guarantee* accurate performance evaluations, the following suggestions can make the process more objective and fairer.

Use Multiple Evaluators As the number of evaluators increases, the probability of attaining more accurate information increases, as does the likelihood that the employee will accept the feedback as valid.[182] We often see multiple evaluators in competitions in sports such as diving and gymnastics. A set of evaluators judges a performance, the highest and lowest scores are dropped, and the final evaluation is made up of those remaining. The logic of multiple evaluators applies to organizations as well. If an employee has ten supervisors, of whom nine rated them as excellent and one poor, we can safely discount the one poor evaluation. By moving employees within the organization to gain a number of evaluations, or by using multiple assessors (as in 360-degree appraisals), we increase the probability of achieving more valid and reliable evaluations.

Evaluate Selectively To increase agreement among evaluations, appraisers should evaluate the areas of performance for which they have working knowledge.[183] Appraisers should thus be as close as possible, in organizational level, to the individual being evaluated. The more levels that separate the evaluator from the employee, the less opportunity the evaluator has to observe the individual's behavior and therefore the greater the possibility for inaccuracies. Moreover, some research suggests that some evaluators have more of a firsthand opportunity to observe performance than others, especially employees who occupy a core position in the individual's social network rather than a peripheral one.[184]

Train Evaluators If you cannot *find* good evaluators, *make* them. Training can produce more accurate raters.[185] Most rater training courses emphasize changing the raters' frame of reference by teaching them what to look for, so everyone in the organization defines *good performance* in the same way. Another effective training technique is to encourage raters to describe the employee's behavior in as much detail as possible. Asking for more detail encourages raters to remember more about the employee's performance rather than just acting on their feelings about the employee at the moment.

Provide Employees with Due Process The concept of *due process* can be applied to appraisals to increase the perception that employees are being treated fairly.[186] Three features characterize due process systems: (1) Individuals are provided with adequate notice of what is expected of them, (2) all evidence relevant to a proposed violation is aired in a fair hearing so the individuals affected can respond, and (3) the final decision is based on the evidence and is free of bias. Research has demonstrated that employees who feel they are safe to contribute during a performance appraisal meeting and feel that their leader supports their contributions (and welcomes disagreements) leave the meetings feeling like it was a success.[187]

One technique that organizations might consider enhancing due process is posting appraisals online so employees can see their own performance scores exactly as the supervisor enters them. One company that did so found employees believed rater accountability and employee participation were higher when appraisal information was available online prior to appraisal interviews.[188] Maybe raters were more sensitive to providing accurate ratings when they knew employees would be able to see their own information directly.

An Ethical Choice

Eliminating Bias from Performance Reviews

Although performance evaluations may be described as impartial measures of employee performance, they are often far from objective. There are some startling disparities in performance evaluations that can be attributed to race and gender. For example, only 9.5 percent of employees from underrepresented ethnic groups received references to leadership in their performance evaluations—more than 70 percent less than those used in White women's performance evaluations. This disparity is significant because the mention of leadership skills in performance evaluations usually predicts higher competency ratings the following year.

More specifically, there are patterns of bias that have emerged over decades of research on performance evaluations. Employees from underrepresented groups tend to be judged based on their mistakes more frequently than their potential. Furthermore, they are more likely to have their personality traits mentioned in their evaluations (rather than what they actually did or did not do). The traits that are mentioned are more often negative than positive.

The good news is that several interventions or so-called "bias interrupters" can be employed to effectively reduce bias in performance reviews. Two simple ones are outlined below:

1. Use an evaluation form that includes specific competencies on which the employee will be evaluated. The ratings for each of these should be supported by at least three pieces of evidence. Open-ended questions should be avoided if possible because without the structure of specific criteria, as many studies have shown, individuals are more likely to rely upon stereotypes when making decisions.
2. Develop a workshop to teach individuals how to effectively implement the form. As part of the workshop, elicit comments from the previous year's evaluations and ask whether patterns of bias are represented in the comments.

Although employers may intend to be as meritocratic as possible when utilizing performance evaluations, assessments are often not perfect and can be vulnerable to implicit biases. Thus, each year, thoroughly auditing performance reviews is necessary and can help organizations develop workplaces that are more equitable and inclusive.[189]

Providing Performance Feedback

Few activities are more unpleasant for many managers than providing performance feedback to employees. In fact, unless pressured by organizational policies and controls, managers are likely to ignore this responsibility. Why?

First, even though almost every employee could stand to improve in some areas, managers fear confrontation when presenting negative feedback. Second, many employees do tend to become defensive when their weaknesses are pointed out. Instead of accepting the feedback as constructive and a basis for improving performance, some criticize the manager or redirect blame to someone else. As a side note, managers are not immune to this either—managers become cynical and defensive when presented with multi-source feedback in their own performance appraisals and are more likely to leave as a result (especially when under pressure and with few resources).[190] Third, managers tend to have inflated perceptions of how employees perceive their feedback as well as the accuracy of their own feedback, and therefore deliver feedback ineffectively. Managers should not make assumptions regarding how employees feel or may interpret the feedback.[191] Finally, employees tend to have an inflated assessment of their own performance. But the average employee's estimate of their own performance level is generally much higher than it is in reality.

The solution to the problem is not to ignore it but to train managers to conduct constructive feedback sessions. An effective review—in which the employee perceives the appraisal as fair, the manager as sincere and empathetic, and the climate as constructive—can leave the employee feeling upbeat, informed about areas needing improvement, and determined to correct them.[192] This is a perfect outcome if the evaluation is fair and thorough, but unfortunately an

employee may feel this way in situations where the evaluator feels an interdependence with the employee and therefore is more lenient in the evaluation.[193]

It probably would not surprise you that employees in a bad mood are much less likely to take advice than employees in a good mood.[194] Appraisals should also be as specific as possible. People are most likely to overrate their own performance when asked about overall job performance, but they can be more objective when feedback is about a specific area.[195] It is also hard to figure out how to improve your performance globally—it is much easier to improve in specific areas. The performance review should be a counseling activity more than a judgment process, best accomplished by allowing it to evolve from the employee's self-evaluation.

Myth or Science?

The 24-Hour Workplace Is Harmful

This statement appears to be true in many cases. Although technology makes it possible for employees to be plugged in all the time, in constant contact around the globe, research suggests that employers who push employees to check in at all hours and stay connected may well be doing themselves (and their employees) a disservice.

A growing body of research has uncovered serious health consequences of insufficient sleep, and work practices that encourage employees to be plugged in 24 hours a day may be making the situation worse. One study examined how late-night work influenced job outcomes by having employees complete diary surveys on their sleep and engagement at work over multiple days. Those who used smartphones at night for work were less engaged in their work tasks the next day, even after accounting for other technology use.

From another angle, researchers have looked at the personal consequences of workaholism, which is the tendency to think constantly about work off the job and to feel compelled to work excessive hours. This habit is associated with higher levels of burnout, stress, and family problems. While workaholism is partially driven by personality factors, surveys suggest that features of the workplace itself can enhance workaholic tendencies, including excessive workloads, conflicting work priorities, and time pressures. Workaholics may not immediately perceive these effects because they are often highly committed to their work and enjoy it in the short term, until burnout occurs.

The key to maintaining performance over time may lie in developing psychological detachment from work. Alongside studies showing the negative effects of overexposure to work demands we can place another body of work showing that short regular breaks made up of total rest and avoidance of work responsibilities can recharge a person's energy. Unplugging from constant work demands for short periods actually makes us much more productive over the long haul. Therefore, the evidence is clear: Unplug to recharge yourself. HR can support this effort by presenting the research findings to managers and helping to establish practices and boundaries that benefit everyone.[196]

Accessible Workplaces

17-6 Discuss how reasonable accommodations make accessible workplaces.

Workplace policies, both official and circumstantial, regarding individuals with physical or mental disabilities vary from country to country but matter for all HR processes, including recruitment, selection, training, and performance management.[197] Countries such as Canada, The Netherlands, New Zealand, Syria, and Mali have specific laws to protect individuals with disabilities.[198] These laws have resulted in greater acceptance and accommodation of people with physical or mental disabilities. In the United States, for instance, the representation of individuals with disabilities in the workforce rapidly increased with the passage of the ADA in 1990.[199] According to the ADA, employers are required to make reasonable accommodations so their workplaces will be accessible to individuals with physical or mental disabilities.[200] Examples of recognized disabilities include

missing limbs, seizure disorder, Down syndrome, deafness, schizophrenia, alcoholism, diabetes, depression, and chronic back pain. These conditions share almost no common features, so there is no specific definition about how each condition is related to employment.

Accommodations for Physical Disabilities

The EEOC classifies a person as having a *disability* who has any physical or mental disability that substantially limits one or more major life activities. The impact of disabilities on employment outcomes has been explored from a variety of perspectives. On one hand, when disability status is randomly manipulated among hypothetical candidates, individuals with a disability are rated as having superior personal qualities like dependability.[201] Another review suggested that workers with disabilities receive higher performance evaluations. However, individuals with disabilities tend to encounter lower performance expectations and are less likely to be hired.[202]

Discrimination against the workforce of those individuals with disabilities has long been problematic (see the chapter on diversity, equity, and inclusion in organizations for an in-depth discussion on discrimination and prejudice).[203] In Europe, for instance, policies to motivate employers have often failed to boost the workforce participation rate for workers with disabilities, and outright quota systems in Germany, France, and Poland have backfired.[204] However, the recognition of the talents and abilities of individuals with disabilities has made a positive impact. In addition, technology and workplace advancements have greatly increased the scope of available jobs for those with all types of disabilities.

Managers need to be attuned to the true requirements of each job and match the skills of the individual to them, providing accommodations when needed. And the accommodation process should not be a merely transactional determination—research from nearly twenty thousand German federal employees found that supervisors and subordinates with physical disabilities can work together to establish accommodations that work for everyone involved (and reduce the likelihood of turnover among employees).[205]

Accommodations for Hidden Disabilities

As we mentioned earlier, disabilities include observable characteristics like missing limbs, illnesses that require a person to use a wheelchair, and blindness. Other disabilities may not be directly observable. Unless an individual decides to disclose a disability that is not easily observable, it can remain hidden at the discretion of the employee. These are called *hidden disabilities* (or invisible disabilities). Hidden disabilities generally fall under the categories of sensory disabilities (for example, being hard of hearing), autoimmune disorders (like rheumatoid arthritis), chronic illness or pain (like carpal tunnel syndrome), cognitive or learning disabilities (like attention deficit hyperactivity disorder [ADHD]), sleep disorders (like insomnia), and psychological challenges (like PTSD).[205] Mental disabilities may affect performance more than physical disabilities: Individuals with common mental health issues such as depression and anxiety are significantly more likely to be absent from work.[207]

As a result of changes to the Americans with Disabilities Act Amendments Act (ADAAA) of 2008, U.S. organizations must accommodate employees with a broad range of disabilities. However, employees must disclose their conditions to their employers in order to be eligible for workplace accommodations and employment protection. Many employees do not want to disclose their invisible disabilities, so they are prevented from getting the workplace accommodations they need in order to thrive in their jobs. Research indicates that individuals with hidden disabilities are afraid of being stigmatized or ostracized if they

disclose their disabilities to others in the workplace, and they believe that their managers will think they are less capable of strong job performance.[208] Add this to the challenge of receiving a diagnosis for a condition that one did not previously have, and these fears are compounded even more so than if the diagnosis was made for employees when they were younger.[209]

In some ways, a hidden disability is not truly invisible. For example, a person with an undisclosed diagnosis of autism spectrum disorder (ASD) will still exhibit the behaviors characteristic of the condition, such as difficulty with verbal communication and lack of adaptability.[210] You may observe behaviors that lead you to suspect an individual has a hidden disability. Unfortunately, you may attribute the behavior to other causes—for instance, you may incorrectly ascribe the slow, slurred speech of a coworker to an alcohol dependency rather than to the long-term effects of a stroke.

As for the employee, research suggests that disclosure generally helps all—the individual, others, and organizations. Disclosure may increase the job satisfaction and well-being of the individual, help others understand and assist the individual to succeed in the workplace, and allow the organization to accommodate the situation so that the employee and the organization achieve top performance.[211] Moreover, following disclosure, managers and employees alike should put in the work to learn more about the physical or mental disability (so they do not make unfounded assumptions)[212] and do what they can to develop an environment that is accommodating, inclusive, and equitable.[213]

Human Resources (HR) Leadership

17-7 Describe the leadership role of human resources (HR) in organizations.

We have discussed the important functions HR departments serve in recruitment, selection, training and development, performance management, and accommodations for disability. Arguably, these are an organization's most important tasks in managing its most valuable asset—its people. However, HR also plays a key leadership role in nearly all aspects of the workplace environment. HR is active in designing and administering benefits programs, to conducting attitude surveys, to drafting and enforcing employment policies. HR is on the frontlines in managing adversarial employment conditions such as work–life conflicts, mediations, terminations, and layoffs. It is on the scene when an employee joins and leaves and all along the way. HR departments uniquely represent both the employees' and the company's perspectives as needed, so we will discuss the importance of HR communication before each of the facets of HR leadership.

Companies have only recently begun to recognize the potential for HR to influence employee performance. Researchers have been examining the effects of a **high-performance work system (HPWS),** a group of human resources practices that some organizations have been implementing.[214] These practices work together and reinforce one another to accomplish the organization's strategy and improve organizational outcomes over time.[215] HPWS may increase organizational performance, but higher organizational performance may also reinforce high-performance practices by providing more resources to an HPWS. HPWS may also have more of an effect on organizational performance when leadership is not oriented toward organizational goals (e.g., improving customer service).[216] HPWS practices can include those that enhance motivation, such as profit sharing programs and other reward systems, as well as practices that improve skills, such as training and development programs.[217] Creativity-oriented HPWS inspire employees to come up with innovative solutions that meet diverse customer needs.[217] Lastly, empowerment-oriented HPWS empower employees to speak up and autonomously take charge of their work, leading to improved job performance.[219]

high-performance work system (HPWS)
A group of human resources practices that work together and reinforce one another to improve organizational outcomes.

Toward a Better World

Kawasaki: Learning from Each Other at Takumi Juku and Manabiya

Kawasaki Heavy Industries is a major public manufacturer of heavy equipment (e.g., robots, gas turbines, boilers), vehicles, and ships. Headquartered in Kobe, Japan, Kawasaki is one of the major Japanese manufacturing companies, alongside Mitsubishi. Throughout the last decade, Kawasaki has endeavored to make the environment, sustainability, and governance (ESG) a core part of its strategy. Moreover, it has sought to align its HR strategies and operations with its ESG goals and with its corporate mission to build a sustainability-focused high-performance work system (HPWS). One of Kawasaki's key ESG values is "support for the next generation," and Kawasaki realizes this value through many HR programs.

How does Kawasaki foster this sense of shared mission and goals within an HR system? First, Kawasaki has implemented the Gyomu Mokuhya Kyoyuka ("Sharing Business Targets") program, intended to create bi-annual supervisor–subordinate meetings to track performance, identity training and growth needs, and foster a shared acceptance of goals. For technical specialists, this also involves improving front-line production skills through an apprenticeship program that pairs "grand master" specialists (who have been credentialed as extremely skilled in their trade) with newer employees. Second, Kawasaki holds an annual technical skills contest for younger employees to demonstrate the talents they learned at their worksites. These newer employees from Japan and other countries worldwide gather at the Akashi Works, a major manufacturing plant, to take part in these contests to develop their skills and learn from one another. Finally, Kawasaki has opened to corporate campuses for technicians to pass down their skills and learn collaboratively. The Takumi Juki at the Harima Works plant, as well as the Manabiya at the Akashi Works plant, create formal centers for employees to learn from one another.

Kawasaki's reach to create a collaborative culture that learns from one another does not stop there. Apart from facilitating training and skill transfer amongst its employees, it also develops knowledge, skills, and engagement among young people worldwide. First, Kawasaki has created a corporate museum to teach young people and other community members about technology and craftsmanship. This museum, or Kawasaki Good Times World, sees nearly two hundred thousand visitors annually and provides people with an opportunity to interact with and learn about how motorcycles, robots, and other machines across land, sea, and air are made. Second, Kawasaki hosts Handicraft and Experiment Courses for children to learn how to make their own technology-oriented products. Employees from every business unit develop and deliver these training programs to children from the community, who have an opportunity to actively participate in building toy helicopters, cranes, motorcycles, trains, ships, and even toy jet engines and power plants. The Handicraft and Experiment Courses program has won several awards at the Education Support Project Grand Prix. Finally, the Akashi Works and Manabiya campus are strategically located next to Hanazono Kindergarten, Kisaki Elementary School, and Bokai Junior High School. Every year, parents and students from these schools are invited to take field trips to the Akashi Works to tour the facilities, learn about the manufacturing process, and have lunch with Kawasaki employees.

Why should organizations like Kawasaki seek to involve HR in the pursuit of ESG goals? Research by Marsh & McLennan concludes that ESG has a major impact on workforce sentiment (which can be a competitive advantage). It is becoming increasingly important to the recruitment, selection, and retention of employees. Moreover, a survey of 170 board directors worldwide conducted by Willis Towers Watson suggests that performance management systems should play a role in meeting ESG goals, aligning them with performance evaluation and incentives. HR and leadership have a way of "supercharging" ESG efforts. With executive support and communication of ESG goals and policies all employees can become involved and educated about the company's ESG effort. Kawasaki's ESG initiatives may be playing a role here, as it boasts a less than 2 percent annual turnover rate with over two-thirds of the workforce expressing interest in continued employment with Kawasaki.[220]

Communicating HR Practices

Leadership by HR begins with informing employees about HR practices and explaining the implications of decisions that might be made around these practices. It is not enough simply to have a practice in place; HR needs to let employees know about it. When a company successfully communicates how the whole

system of HR practices has been developed and what function this system serves, employees feel they can control and manage what they get out of work.[221] We have noted in other chapters that knowing you can influence the outcomes of your work is highly motivational. Employees can come to see the HR philosophy and system as an employer's expression of concern, and the positive feelings that result have been shown to not only affect the adoption of the HPWS by employees[222] but also increase employee commitment, retention, and engagement.[219]

The evidence supporting the contribution of communication and perception to HR effectiveness is considerable (with some research suggesting leadership is the most valuable component).[224] For example, one study of different business units within a large food-service organization found that employee perceptions of HR practices, rated at the work-group level, were significant predictors of OCB, commitment, and intention to remain with the company,[225] but the HR practices led to these positive outcomes only if employees were aware they were in place. Other studies have found that HR practices have different effects depending on how employees perceive the reason for them.[226] Employees who think HR practices are established to improve performance and benefit workers reciprocate with greater commitment and performance. Employees who think these same practices are established to exploit workers do not have the same positive reactions.

The effectiveness of HR practices also depends on employee attitudes. One review found that HR practices were more likely to lead to positive outcomes when employees felt motivated.[227] Other research indicated that employees who were more knowledgeable about the purpose of a performance management system used the system more effectively to improve their efficiency and thoroughness.[228] Taken together, these results suggest that it is not enough for employers simply to set up practices—they need to show that the practices are actually attempts to make the company more successful and help employees achieve better outcomes. Leadership communication can help shape employee attitudes and perceptions about HR practices.

Drafting and Enforcing Employment Policies

Along with benefits come responsibilities and employees need to know what the organization expects from them. Employment policies that are informed by current laws but go beyond minimum requirements will help define a positive organizational culture and climates (see the chapter on culture and change). Policies differ from benefits (see the chapter on motivation application) in that they provide the guidelines for behavior, not just the working conditions. A company might provide the benefit of a special break room for mothers of young children, but a policy is needed to outline the expectation for conduct. May mothers elect to feed their babies in other places in the facility or only in the break room? What timing is acceptable? Where can collected breast milk be stored? Establishing policies to address potential questions can help minimize confusion for all employees. The lactation case is an example of a potential benefit and policy combination that will ensure employees recognize the benefit as an employer's aid to their well-being while understanding how and where to use it. However, any policy must have enforcement to be effective. HR managers are responsible for setting the organizational consequences of infractions and often for enforcing policies as well.

Sometimes, HR managers need to act even when the employee's direct manager may not agree, especially if compliance with the law is at issue. For example, many companies in the entertainment, nonprofit, publishing, and marketing industries use unpaid post-college interns, who are supposed to receive on-the-job experience as compensation. The Labor Department stipulates that interns

who are unpaid must be provided a vocational education experience and that their work cannot profit the employer. Interns report getting stuck doing menial tasks an employer would need to pay someone else to do. If these companies want to continue using unpaid interns, HR managers need to set policies that clarify the assignments the supervisors can give and then ensure that the policies are followed. Otherwise, their organizations will face lawsuits like the one from Eric Glatt, an intern on the movie *Black Swan*, who sued for minimum wage violations. A judge in the U.S. District Court ruled that he was improperly cataloged as an intern. The decision cited criteria from the Labor Department wherein an unpaid internship must provide work similar to training the person would receive in a school, benefit the intern not the employer, and not displace other employees. This ruling sparked similar claims against NBC Universal, Fox, Viacom, and other large organizations, often ending in out-of-court settlements. The issue is far from conclusive, however, leaving the burden on interns to litigate if they are unfairly treated.

In conclusion, the role of leadership in HR is imperative to create positive cultures and climates that meet organizational objectives, realize desired business outcomes, and remain competitive in the marketplace as high-performing work systems.

Summary

An organization's HR systems and practices create important forces that greatly influence OB and important work outcomes. HR departments have become increasingly integral in shaping the composition of the organization's workforce. First, HR departments have taken the lead in establishing an online presence to attract job seekers to learn about their organization to further their recruitment efforts, build relationships with job seekers through recruiters, and provide a window into a day in the life of employees through realistic job previews. Second, HR departments are involved in all phases of selection: initial selection, substantive selection, and contingent selection, with the ultimate goal of hiring the best candidates who contribute to the organization's human capital resources and who are poised to advance the mission and objectives of the organization. In effective organizations HR remains actively involved throughout an employee's time with the organization. HR departments create and administer training and development programs. In many companies, HR provides continuous, active learning opportunities for their employees to stay engaged and grow as members of the organization. They also set policies and practices that govern the performance evaluation system. Although many companies have not fully mastered performance management yet, it can be a great HR tool if implemented frequently and with the goal of being developmental, not punitive. Finally, HR is an important function for building diverse and inclusive workplaces, especially for employees with physical and mental disabilities. HR works with employees to establish reasonable accommodations to build inclusive and accommodating workplaces. Overall, HR serves in a leadership capacity with responsibilities that include drafting, communicating, and enforcing employment policies and practices regularly. HR should bring awareness of ethical issues to all stages of an individual's experience with the organization. Therefore, knowledgeable HR professionals are a great resource to all levels of the organization, from top management to employees.

Implications for Managers

- Managers should increase applicant attraction by managing their impressions with potential job seekers. To do so, recruiters should be trained to build positive relationships with job seekers; the recruitment and selection systems should be fair, just, and clear; and the company brand should communicate its core values and safeguard its reputation.
- Although referral hiring is an extremely common practice, there is mixed evidence for whether it is effective. In some ways, it can enrich workplace relationships—in other ways, job seekers and current employees may see the practice as unfair.
- Realistic job previews are one way to manage job seekers and applicant expectations of what it is like to work at a company. The realistic job preview is becoming increasingly accessible to managers. Many companies post realistic job preview videos, simulations, and games on their websites.
- The hiring process is extremely complex, and managers should carefully consider the methods they use in initial, substantive, and contingent selection. Above all, managers should make sure that each piece of the selection puzzle positively contributes to the decision, does not introduce bias, complies with laws and regulations, and does not treat people from underrepresented groups unfairly. Moreover, some of the most common methods (e.g., unstructured interviews, applications, cover letters) are the least informative.
- Managers should build systems that keep track of training needs and skills gaps, design (online and in-person) programs that meet these needs, and continuously evaluate their effectiveness. Formal and informal training have their place, and managers should take a three-pronged approach that focuses on building structure, fostering trainee engagement, and nurturing positive learning interactions between people.
- Performance management is done poorly more often than not. Managers should consider ditching the traditional approach of annual performance appraisals for termination, promotion, and pay increase decisions. Instead, managers could develop performance management systems that are conducted continuously, focus on concrete behaviors, obtain feedback from multiple trained employees well acquainted with the target individual, and serve developmental purposes (e.g., providing feedback that identifies professional growth and development gaps).
- Managers are required to provide reasonable accommodation for disclosed, recognized disabilities under the ADA. Beyond this, however, managers should actively work with employees with disabilities to consider their needs, learn more about their disabilities so that they can better understand their situations, and foster an inclusive and accommodating environment.
- Leadership plays a critical role in establishing, communicating, and enforcing high-performance work practices. With executive and manager support and championing, many organizational initiatives could fall flat.

Employers Should Check Applicants' Criminal Backgrounds

POINT

Depending on where you live, you may have been asked about your criminal arrest record on a job application. Even if you were not asked outright, the company might have investigated anyway using a background check service. Surveys suggest that nearly 70 percent of companies do some sort of criminal background check on job applicants. When so many are using the same basic strategy, they likely have a good reason.

Companies check criminal records for many purposes. Some managers believe that prior criminal behavior may be an indicator of future criminal behavior. Many employees have used the access and privileges of their jobs to commit crimes, ranging from theft to assault or even murder. A check of their criminal records may help screen out these individuals.

As Lucia Bone, founder of the nonprofit Sue Weaver Cause, says, "It is the employer's responsibility to protect… their business, their employees, and their customers." This is a deeply meaningful issue for Bone. She founded the organization and named it after her sister, Sue Weaver, murdered by a man with a criminal record who had access to her home to clean air ducts. Many hiring managers check criminal backgrounds specifically because they do not want their own lack of diligence to lead to similarly tragic outcomes.

Besides signaling an immediate risk of criminal activity on the job, criminal records may be good behavioral indicators of other deviant workplace behavior. People who are willing to violate social conventions in one area may likely violate them in others. When employers screen for the use of illegal drugs or shoplifting arrests, they are trying to identify people who might lie to supervisors or embezzle money. Information gathered from criminal records is likely to be more objective and accurate than a manager's gut feelings about who will pose a problem in the future.

COUNTERPOINT

According to sociologist Devah Pager, the high U.S. incarceration rate means employers' hiring decisions have major labor market and social implications if based on criminal records. Koch Industries has stopped asking applicants about criminal records. CEO Charles Koch notes, "If ex-offenders can't get a job, education, or housing, how can we possibly expect them to have a productive life?" Koch's concern is valid. One study linked a young-adult arrest record to lower incomes and education levels later in life and a conviction record to lower levels.

There are also substantial racial and ethnic group differences in arrest rates. Men are much more likely to have arrest and conviction records than women. The Equal Employment Opportunity Commission (EEOC) concludes that excluding individuals with criminal records from jobs effectively discriminates against Black men in particular.

Criminal background checks do not necessarily give employers the information they seek. A core principle of modern criminal justice holds that we all are innocent until proven guilty. However, some screens will turn up both conviction and arrest records. This is problematic because fewer than half of arrests end in conviction. While the use of arrest records is prohibited in many localities, that is far from a universal rule. Other investigations have found that online criminal records checks are prone to false positives, reporting that someone has a criminal past when they do not.

Another problem is the lack of relevance. While many would agree that a person convicted of assault is not a good candidate for work that requires carrying a weapon or associating with vulnerable populations, it is less clear how a petty-theft conviction might raise the same concerns. Sociologist Christopher Uggen summarizes by observing, "We haven't really figured out what a disqualifying offense should be for particular activities."[229]

CHAPTER REVIEW

QUESTIONS FOR REVIEW

17-1 What is the value of recruitment methods?

17-2 What are the methods of initial selection?

17-3 What are the most useful methods of substantive selection?

17-4 What are the similarities and differences among the main types of training?

17-5 What are the methods of performance management?

17-6 How does reasonable accommodation make a more accessible workplace?

17-7 What role does leadership play to HR in organizations?

APPLICATION AND EMPLOYABILITY

HR policies and practices have a tremendous influence on the success of an organization. Recruitment and selection enable organizations to increase their human capital resources. Training can also strengthen the abilities and skills of employees that drive organizational performance. HR practices and policies also determine how performance is measured, the inclusiveness and accessibility of the workplace, and other factors that influence many important organizational outcomes. In this chapter, you helped develop many skills that are useful in the workplace. You developed your critical thinking and creativity, social responsibility, leadership, and career management skills by uncovering the role high-performance demands play in crafting harmful "24-hour" workplaces, determining how to remove bias from performance reviews, debating whether employers should conduct criminal background checks, and discovering how Kawasaki meets its sustainability goal of "supporting the next generation," both internally and externally. In the next section, you will continue to build these skills by designing an assessment center exercise, deciding whether to hire a friend, and facing the travesty of human trafficking in the United States.

EXPERIENTIAL EXERCISE Designing a Virtual Assessment Center Exercise

In this exercise, you will focus on creating a performance-simulation test for selecting a new head of character design at a digital animation studio. The position is completely virtual. Candidates are being assessed worldwide. To assess candidates from so many varied geographical areas, the hiring manager wants to use an assessment center to select the new employee. As you learned in the chapter, assessment center exercises are meant to simulate problems that employees may encounter on the job. Because assessment centers are conducted offsite, employers can create virtual assessment centers that candidates can take part in on their computers. For example, candidates for a management position may be asked to sign into a website to access a virtual e-mail inbox. Responses sent through this virtual inbox can then assess how a candidate responds to e-mails or memos over a set time period.

A couple of details are unique about the position. Unlike many other positions that may be selected using assessment centers, the head of character design should be very creative, technically proficient, and artistic. A competitive candidate should be a great artist but also good at managing other artists. More typical assessment center exercises would not be suitable for this position.

Step 1: Form groups of two or three people each. To start the exercise, consider the common tasks someone in this position would encounter. What would managing other artists entail? It may be helpful to look up job descriptions for creative directors, head animators, and character designers at large firms like Pixar and DreamWorks. List five to ten essential tasks for someone in this position.

Step 2: Next, pick a task that can be simulated in a virtual assessment center. As a group, write a brief description of the task. Make sure to consider the following: the objective of the task, what instructions the candidates would receive, and how much time the candidates would have to complete the task.

Step 3: When you have created your assessment center exercise, consider how to score applicants' work. First, to create a good rubric for scoring, decide what results would reflect good or poor performance. Next, decide what traits would be needed to be successful during this exercise. Each trait should be measured by something that can be seen while the person is completing the task or accessing the task results. Create a rating scale to assess candidates on your assessment center exercise.

After all the groups have designed the assessment center exercise and rating scale, as a class, discuss what each group did.

Questions

17-8. What were some of the challenges of creating an assessment center exercise for this type of position?

17-9. How did you determine the core tasks that would be needed for this type of position?

17-10. Could you use the assessment center model to determine if a candidate had all the traits needed to complete the job?

17-11. Was it easy to create a task that could be used in a virtual rather than in-person assessment center? Would using another means of selecting candidates (structured interview, work sample) be easier?

ETHICAL DILEMMA Should I Pay the Staff More and Reduce the Company's Profit?

Ryanair has radically changed the travel habits of European citizens over the last decade, with 131 million customers in 2017 alone. Popular among millennials especially for its cheap fares, Ryanair faced an unexpected crisis in the fall of 2017 with more than 20,000 cancelled flights and 700,000 passengers who had to be refunded or diverted to other flights. The problem was due to a staffing crisis, with a high number of pilots deciding to quit the company after having been offered higher compensation and better working conditions by Ryanair's competitors.

In an extreme attempt to remedy the pilot roster crisis, CEO Michael O'Leary wrote a letter promising a loyalty bonus to those pilots who would remain with the company and agree to fly additional hours during their time off. The letter was an attempt to show more gratitude to pilots and give an indirectly reply to unions that, in the months leading up to the crisis, had denounced Ryanair's employment model, which was characterized by a systematic use of external contractors and self-employed pilots who are hired through external agencies. These pilots do not receive compensation for non-flight hours and are not entitled to vacation, sickness, or paid leave.

Regardless of the specific circumstances of Ryanair's case, this story brings to light a highly debated question in human resource management. Should the workforce be paid more at expense of company's profit? Should personnel be treated in a better fashion with greater provision of benefits programs? Many would likely say yes, but the answer to this question is not as straightforward as it seems. Many employers would like to pay their staff more and promote them more often, but there are several constraints, including global competition and customers who might not be keen to pay more for products or services whose prices are justified by better employment conditions. Yet, as the case demonstrates, there are some drawbacks to failing to treat well those who could cause severe damage to the company's reputation and regular functioning.[230]

Questions

17-12. How might Ryanair's CEO convince pilots to remain loyal to the company? Would monetary incentives be sufficient?

17-13. Is it appropriate to write pilots a letter to promise a bonus for accepting to fly more hours during time off? What could Ryanair do differently to better communicate their HR practices?

17-14. Does more sustainable management of the workforce impose costs or generate benefits for companies?

CASE INCIDENT Fired via Video Message

How would you feel if you were fired from your job without any warning and via a 3-minute pre-recorded Zoom video? This is what 800 employees of P&O Ferries, one of the largest British shipping companies, experienced in Spring 2022. P&O Ferries operates ferries from the United Kingdom to Continental Europe and Ireland and is owned by a Dubai-based logistics company. Like so many other companies in the transportation sector, P&O Ferries was hit hard by the COVID-19 crisis and lost millions of pounds. The decision to lay off 800 seafarers was claimed as a necessary part of the CEO's attempt to restructure its operations and the only way to save the business from going under.

However, the company's drastic decision came as a complete surprise to its employees, as the company had not gone through the due process of consulting them or the worker's union before carrying out the mass job cuts, as is required by the UK law. Employment laws vary in different countries; for example, in the United States, law consultation and notice rights are somewhat limited, while in countries like India and Japan, neither collective nor individual consultation is required. In the United Kingdom, on the other hand, a company's HR department should be aware that such a process is mandated by the UK employment law. If the due process is not followed, such decisions can be challenged by the employment tribunal. The CEO's failure to take HR input in this decision meant that the company would later be found in breach of the law.

Furthermore, the very way in which redundancy decisions were communicated to the employees lacked proper processes and procedures. The 3-minute prerecorded Zoom video meeting took place at the end of the day, without any warning. The call simply informed seafarers that their job no longer existed, and following the announcement, they were escorted off the vessels in which they worked. Most employees were left in a state of shock and devastation—many of them had worked for the company for a number of years and had demonstrated loyalty and hard work throughout the pandemic.

What made the situation more controversial was that P&O Ferries was not merely downsizing but was engaging in a form of "fire and rehire," as it later became clear that the sacked workers were being replaced with cheaper agency staff. Fire and rehire is a practice whereby a firm dismisses an employee only to rehire them or get another candidate for the same job under different, typically less favorable conditions, such as lower pay. The practice is not illegal in the United Kingdom, but it does raise a lot of ethical, reputational, and even safety concerns. In this case, rather than hire new staff directly onto their payroll, P&O Ferries decided to hire agency workers. It later transpired that these workers were Indian and paid significantly below the UK minimum hourly wage by the agency.

P&O Ferries' behavior caused significant outrage and condemnation by workers' unions as well as the broader media and public. A UK Parliament select committee inquiry was initiated to investigate the matter, and criminal and civil investigations into the circumstances around the redundancies were launched. The RMT, the worker's union to which the sacked seafarers belonged, also called for economic sanctions against the company, but it soon became clear that the company was in trouble, but for a different reason: their ships were grounded for six weeks due to the agency crew's lack of familiarity with the proper safety procedures and other operational procedures. But the reputational damage is even more significant; several months after the scandal, it was revealed that P&O had suffered a colossal 92 percent slump in private customer transfers and an 87.7 percent decline in freight volume as businesses chose not to use the company's services. While tough choices sometimes need to be made to keep a business viable, this case shows the consequences of poor workforce management decisions.[231]

Questions

17-15. Identify the instances in this case where management should have properly consulted and followed the advice of their HR department.

17-16. The company decided to replace the sacked seafarers with agency staff from a different country on lower wages. Compared to the in-house recruitment and selection processes, what potential issues do you think this way of recruiting staff may cause?

17-17. What do you think may be the consequences of such poorly handled HR issues for the company?

18 Stress and Health in Organizations



Source: Maridav/Shutterstock

LEARNING OBJECTIVES

After studying this chapter, you should be able to:

18-1 Describe how the stress process unfolds in the workplace.

18-2 Discuss how sleep, illness, and injury affect physical health at work.

18-3 Recognize how maladaptive mental health conditions can manifest as a consequence of stressors at work.

18-4 Compare the four major stress and health theories.

18-5 Differentiate between work–life conflict and work–life enrichment.

18-6 Describe individual and organizational approaches to managing stress at work.

Employability Skills Matrix (ESM)

	Myth or Science?	An Ethical Choice	Point/ Counterpoint	Toward a Better World	Experiential Exercise	Ethical Dilemma	Case Incident
Critical Thinking & Creativity	✓		✓	✓	✓	✓	✓
Communication		✓					
Collaboration		✓		✓			✓
Self-Management	✓				✓		✓
Social Responsibility	✓	✓	✓	✓	✓	✓	✓
Leadership		✓	✓	✓		✓	
Career Management	✓	✓		✓	✓	✓	✓

BEATING BURNOUT

Crisis almost always creates stress. This was certainly true as the COVID-19 pandemic began to spread around the world. As was the case in many hospitals, the Department of Emergency Medicine at Massachusetts General Hospital (MGH) in Boston was faced with the task of caring for patients who were infected with a deadly, highly contagious, and not well-understood disease. However, even in this extreme situation, the leaders at MGH were able to employ strategies that helped minimize burnout and, in some cases, even increased physician job satisfaction. Physicians at this hospital recognized the importance of the institution's capable leadership, effective communication, and ability to obtain necessary resources that were in short supply.

Although solving the problem of burnout is complex, the strategies utilized by the leadership at MGH align with the factors that psychologists have found to increase employee engagement and reduce burnout. To begin with, while financial rewards can play a role in reducing burnout, the hospital primarily focused on emotional rewards by ensuring that employees knew everyone's work was appreciated and valued. For example, it collected and shared feedback from appreciative patients with employees who likely would not have otherwise received this feedback. Although physical distancing rules made it somewhat challenging, the hospital facilitated more interaction between patients and physicians. A video conferencing system was utilized when family members could not be at the hospital but could still communicate with staff. When physicians were able to have meaningful interactions with patients and their families, they reported improved well-being.

During a time of uncertainty, hospital leaders focused on reassuring employees through transparent communication. Although they often had to communicate difficult information and frequently did not have all the answers, they sent e-mail updates almost every day to the entire staff that included information about how the leadership team handled the challenging choices it had to make. Many staff members were extremely busy, though, so keeping up with all the changes via e-mail could be overwhelming. As a result, the leadership team began doing "rounds" twice a day to check in with frontline doctors and nurses to address immediate concerns as well as discuss the ever-changing protocols.

Perhaps one of the most challenging tasks during this time was to ensure that employees' workloads were reasonable. The hospital decided to increase the number of physicians in its critical care pod to have fewer total patients and put more effort into caring for each one. Though this strategy may not seem to make sense financially, the leadership understood that patient interactions were now more time-consuming and more emotionally draining. Long-term, this was an effective decision as staff could mentally recharge and ultimately be more effective at their jobs.

Finally, maintaining a sense of community was crucial. Initiatives were implemented to help teams feel more connected, including virtual "wellness sessions." During this time, staff could openly discuss any issues they were experiencing. The hospital surveyed staff and found that two-thirds of those surveyed reported a greater sense of unity and purpose than they had before the pandemic. While the actions taken to prevent burnout will look different depending on the industry, the principle that translates across settings is empowering individuals to perform their jobs effectively in a safe and supportive environment.[1]

Stress and health are increasingly becoming an important part of organizational behavior (OB). Public policy experts, researchers, politicians, managers, and employees alike are beginning to recognize that the detrimental effects of mismanaged stress at work are a public health crisis. Stress is (quite literally) a killer, and the statistics on workplace stress are shocking.[2] One compilation of statistics suggests that (1) 94 percent of workers in the United States experience stress at their workplace (and 63 percent of them are ready to quit their jobs because of it); (2) it results in up to $187 billion in productivity and health care losses annually; (3) it causes about two-thirds of U.S. workers to lose sleep; (4) it causes a million people to miss work every day; and (5) it results in around 120,000 deaths annually.[3] IBH Solutions, a leading provider of wellness programs (discussed later in this chapter), finds that employees need professional help at higher rates than ever.[4]

In this chapter, we describe stress and health in organizations. We discuss how the stress process unfolds, mental and physical health considerations at work, and the nature of work–life balance. In closing, we consider what individuals and organizations can do to better manage stress levels and realize positive outcomes for OB, which, after all, is the purpose of this text.

The Nature of Stress in Organizations

18-1 Describe how the stress process unfolds in the workplace.

Do you feel stressed? If so, join the crowd. As Exhibit 18-1 shows, work is a major source of stress in the lives of young adults (ages 18–23). Everyone experiences stress in some way, shape, or form. Stress emerges from many sources at work. Racial prejudice is one particularly nefarious source that has left professionals such as Jessica Jackson, a Black clinical psychologist with the Department of Veterans, strained. Thinking back to her high school days, her teacher would say she was in the wrong room and give her lower grades than the other classmates (even on group projects). Jackson has had the stressful and frustrating task of confronting prejudice and discrimination.[5]

When you talk about stress with others, you probably refer to all of it uniformly as "stress."[6] *Stressful* events and situations *stress you out,* and you feel the impact of stress behaviorally, psychologically, and physically. It is plain to see that at its core, stress is part of a process. During this process, many factors (e.g., antecedents and consequences) come into play. After all, not everyone becomes

Exhibit 18-1 **Work Is One of the Top Sources of Stress for Young Adults (Ages 18–23)**

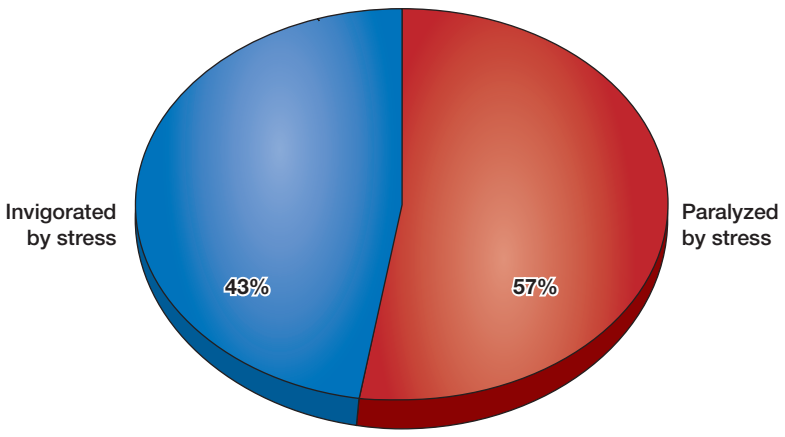
What area of your life causes you the most stress?

Area	Causes Most Stress
Money	78%
Work	64%
Housing costs	52%
Job stability	51%
The economy	44%

Source: Based on American Psychological Association, *Stress in American 2019* (Washington, DC: APA, November 2019): https://www.apa.org/news/press/releases/stress/2019/stress-america-2019.pdf

OB POLL

Paralyzed or Invigorated by Stress?



Source: Based on M. Connolly and M. Slade, "The United States of Stress 2019," *Everyday Health*, May 7, 2019, https://www.everydayhealth.com/wellness/united-states-of-stress/

"stressed out" by the same things, and not everyone responds in the same way. (Some can even be invigorated by stress; see the OB Poll.) Therefore, it might be helpful for us to differentiate between these factors.

stress A generally unpleasant perception and appraisal of stressors.

stressor Conditions or events that an individual perceives as challenging or threatening.

strain The psychological, physiological, and behavioral consequences of stress.

In this chapter, we distinguish between *stressors, stress*, and *strain* (see the model in Exhibit 18-2).[7] First, you are probably most familiar with **stress**, which we define as a generally unpleasant perception and appraisal of stressors. What, then, are stressors? **Stressors** refer to conditions or events that an individual perceives as challenging or threatening. In essence, stressors are the antecedents to the experience of stress. An upcoming project deadline can be perceived as a challenging or threatening stressor to employees. Then, as a result of stress, an individual experiences **strain**, or the psychological, physiological, and behavioral consequences of stress. That project deadline and the stress that it causes can lead to strain—for instance, anxiety, lack of sleep, and procrastination. Therefore, strain encompasses the consequences of the experience of stress.[8]

Stressors

challenge stressors Stressors associated with workload, pressure to complete tasks, and time urgency.

hindrance stressors Stressors that keep you from reaching your goals—for example, red tape, office politics, and confusion over job responsibilities.

We tend to distinguish between two types of stressors: *challenge* and *hindrance* stressors.[9] Researchers have argued that **challenge stressors**—or stressors associated with workload, pressure to complete tasks, and time urgency—operate quite differently from **hindrance stressors**—or stressors that keep you from reaching your goals (for example, red tape, office politics, confusion over job responsibilities).[10]

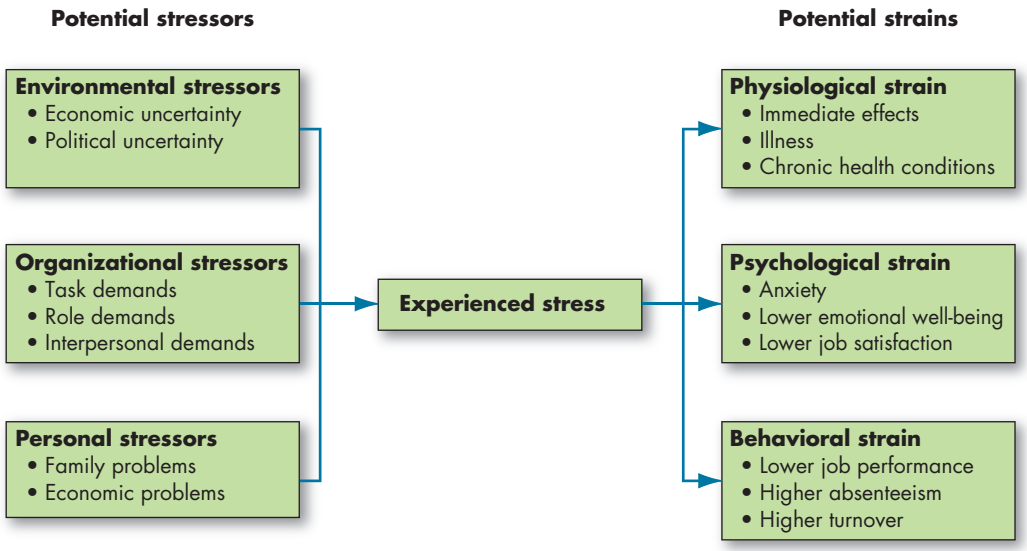
Evidence suggests that both challenge and hindrance stressors lead to strain,[11] although hindrance stressors lead to increased strain levels.[12] Challenge stressors lead to more motivation, engagement, and performance than hindrance stressors.[13] On the other hand, hindrance stressors appear to negatively affect safety compliance and participation, employee engagement, job satisfaction, organizational commitment, performance, and withdrawal than do challenge stressors.[14] Social situations have been traditionally viewed as hindrance stressors (e.g., interpersonal conflict). However, some recent research is challenging this notion and suggesting some people view winning others over as an invigorating challenge (e.g., sales professionals, development officers),[15] navigated effectively by the politically skilled.[16]

Researchers have sought to clarify the conditions under which each type of stressor begins the stress process. For example, challenge stressors tend to lead to improved work engagement when employees are in a good mood.[17] Individual differences play a role. Conscientious employees are also more likely to view both challenge and hindrance stressors negatively (because they are more perceptive and aware that they are stressors), resulting in strain and increased turnover.[18] Moreover, those who hold power are more likely to see stressors as challenging instead of hindering. However, when they become aware that other people rely on them to make things happen, these challenges become hindrances.[18]

The timing and context also matter. Employees who experience challenge stressors inconsistently (e.g., they come and go instead of remaining constant and predictable) can actually experience strain and performance losses.[20] Moreover, unnecessary tasks can act as hindrance stressors that thwart the positive aspects of challenge stressors. (In other words, too many hindrance stressors can cancel out the good effects of challenge stressors.)[21] Challenge stressors improve job performance in a supportive work environment, whereas hindrance stress reduces job performance in all work environments.[22]

Exhibit 18-2 suggests that stressors can come from environmental, organizational, or personal sources.[23]

Exhibit 18-2 A Model of Stress



Environmental Stressors Just as environmental uncertainty influences an organization's design and structure, it also influences stress levels among employees in that organization.[24] Two types of environmental uncertainty are worth mentioning: economic and political. Changes in the business cycle create *economic uncertainties*. When the economy is in a recession, people become increasingly anxious about their job security.[25] *Political uncertainties* result when political threats and changes induce stress. For instance, during the political turmoil that ensued in the United States in 2020, the majority of surveyed Americans reported "the future of [the] nation," "the current political climate," and "political unrest around the nation" as significant stressors.[26]

Organizational Stressors There is no shortage of factors within an organization that can cause stress. Pressures to avoid errors or complete tasks in a limited time, work overload, a demanding and insensitive boss, and unpleasant coworkers are a few examples. We have categorized these factors around the task, role, and interpersonal demands. *Task demands* relate to a person's job. They include the design of the job (including its degree of autonomy, task variety, and automation), working conditions, and the physical work layout. *Role demands* relate to pressures placed on a person as a function of their particular role in the organization.[27] As some examples, role conflict creates expectations that may be hard to reconcile or satisfy. Role overload occurs when the employee is expected to take on too much. Role ambiguity means role expectations are not clearly understood and the employee is not sure what to do. *Interpersonal demands* are pressures created by other employees. Some pressures are expected, but a rapidly growing body of research has shown that negative coworker and supervisor behaviors, including fights, bullying, incivility, abusive supervision, and racial/sexual harassment, are very strongly related to stress at work.[28]

Personal Stressors The typical individual may work between forty and fifty hours a week. But the experiences and problems people encounter in the other hours of the week can "spill over" (see the upcoming section on work–life balance) to the job. For example, the quality and quantity of sleep an individual gets can

adversely affect the amount of strain they experience.[28] The final category of sources of stress at work includes factors of an employee's personal life: family issues and personal economic problems. *Family issues*, even good ones, can cause stress that has a significant impact on individuals.[29] Family issues are often closely related to work–life conflict.[31] Lastly, *personal economic problems* of overextended financial resources create stress and siphon attention away from work.

Stressors Are Additive When we review stressors individually, it is easy to overlook that stress is an additive phenomenon—it builds up.[31] For example, when you experience incivility from customers or coworkers, this can lead you to have a poor night's sleep and experience additional strain beyond the incivility you just experienced.[32] Each new and persistent stressor adds to an individual's stress level. So a single stressor may be relatively unimportant in and of itself. Still, if added to an already high level of stress, it can be too much. To appraise the total amount of stress an individual is under, we must add up all the sources and severity levels of that person's stress. Because this cannot be easily quantified or observed, managers should remain aware of the potential stress loads from organizational factors. Many employees are willing to express their perceived stress load at work to a caring manager.

Strain

Stress manifests as strain in many ways, such as high blood pressure, ulcers, irritability, difficulty making routine decisions, changes in appetite, accident proneness, and the like. Refer back to Exhibit 18-2. These symptoms fit under three general categories: physiological, psychological, and behavioral symptoms.[34] The former two we discuss in greater detail in the next sections.

Physiological Strain Most early concern with stress was directed at physiological symptoms because most researchers were specialists in the health and medical sciences. Their work concluded that stress could create changes in metabolism, increase heart and breathing rates and blood pressure, bring on headaches, and induce heart attacks.[35] Evidence now clearly suggests stress may have other harmful physiological effects, including backaches, headaches, eye strain, sleep disturbances, dizziness, fatigue, loss of appetite, gastrointestinal problems, and even cardiovascular disease.[36] Other research has found that stress, in general, impairs episodic memory (but enhances memory after a stressful event).[37]

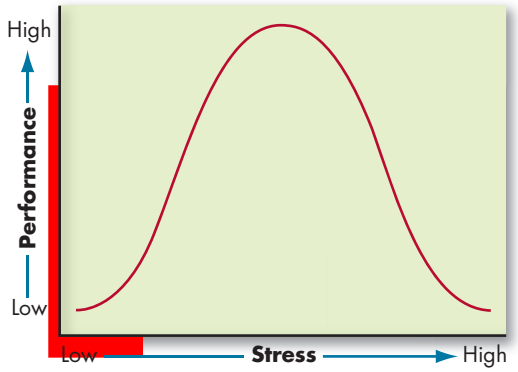
Psychological Strain Job dissatisfaction (see the chapter on job attitudes) is an obvious cause of stress. But stress shows itself in other psychological states—for instance, tension, anxiety, irritability, and boredom. Jobs that provide a low level of variety, significance, autonomy, feedback, and identity appear to create stress and reduce satisfaction and involvement in the job.[38]

Behavioral Strain Research on behavior and stress has been conducted across several countries. Over time, the relationships appear relatively consistent. Behavior-related stress symptoms include reductions in productivity; increases in absences, safety incidents, and turnover; changes in eating habits; increased smoking or consumption of alcohol; rapid speech; fidgeting; and sleep disorders.[39]

Eustress

Although stress is typically discussed in a negative context, it also has a positive purpose.[40] In response to stress, your nervous system, hypothalamus, pituitary, and adrenal glands supply you with stress hormones to cope. Your heartbeat and

Exhibit 18-3 The Proposed Inverted-U Relationship Between Stress and Job Performance



breathing accelerate to increase oxygen while your muscles tense for action.[41] This is a time when stress offers potential gain. Consider, for example, the superior performance of an athlete or stage performer in a critical situation. Such individuals often use stress positively to rise to the occasion and perform at their maximum. Similarly, many professionals see the pressures of heavy workloads and deadlines as positive challenges that enhance the quality of their work and the satisfaction they get from their job. This form of stress has been labeled as **eustress** (from Greek root *eu*, meaning "good"), or a healthy, positive, and constructive appraisal of stressors.[42]

eustress A healthy, positive, and constructive appraisal of stressors.

A significant amount of research has investigated the positive aspects of stress. One proposed pattern of this relationship is the inverted U shown in Exhibit 18-3.[43] The logic underlying the figure is that low to moderate stress levels stimulate the body and increase its ability to react. Individuals may perform tasks better, more intensely, or more rapidly. But too much stress places impossible demands on a person that results in lower performance. Despite its popularity and intuitive appeal, the inverted-U model has not earned a lot of empirical support.[44] Maybe the model misses links between stressors and felt stress and performance? Sometimes, we could be stressed, but we feel fine for other reasons (e.g., individual differences, mood, context).[45] Therefore, this model may be a good, neutral starting point from which to study differences. But we need to consider that the curve may be shifted left or right for certain employees in certain environments.

Physical Health at Work

18-2 Discuss how sleep, illness, and injury affect physical health at work.

Stressors and the experience of stress can result in both physical and psychological strain that often co-occur in response to stress.[46] The COVID-19 pandemic highlighted just how strong health implications are for organizational functioning.[47] For instance, one in four essential workers has been diagnosed with a mental health disorder since the onset of the pandemic. In addition, approximately one in three received treatment from a mental health professional.[48] The "collective trauma" of the pandemic led to many employees describing a deterioration in physical and mental health.[49] In this section, we describe why acknowledging physical and mental health matters in organizations and the areas that have received the most attention by researchers and practitioners, which in the past several decades, has emerged as its own field within the OB domain.[50]

As described in the previous section, physical health is a major form of strain in organizations.[51] Although we often think of physical health as an extremely important outcome in its own right (poor health can lead to premature death), physical health also influences important work outcomes such as interpersonal relationships, productivity, and withdrawal. For instance, immune system health, inflammation, and the gut biome have all been shown to influence emotion, motivation, thinking, and behavior at work.[52] Although the link between various physiological systems and behavior in the workplace is emerging, we focus on two areas that have been subject to quite a bit of attention in recent years: (1) sleep and (2) illness and injury.

Sleep

If you have ever held a job where you clocked into work after very little sleep, you probably remember how difficult it was. You may have used caffeine to try to stay awake, counted the hours until the end of your shift, and performed your tasks in a cognitively detached manner. You may have been called out by a supervisor for errors or inattentiveness or even had poor interactions with your coworkers. Indeed, the effects of sleep (see also Myth or Science?) and the fatigue that results (i.e., *sleepiness*) have piqued the interests of researchers in particular,[53] with the majority of studies suggesting that sleep quality has a moderately negative impact on job attitudes and psychological health and mood at work.[54] Moreover, sleep deprivation has a substantial impact on memory,[55] cognitive task performance,[56] and more general job outcomes for both managers and employees, like task performance, attendance, safety behavior, and counterproductive work behaviors (CWBs).[57] A lack of good-quality sleep primarily harms performance by depleting cognitive resources and causes an uptick in CWB due to its negative effect on mood and self-control.[58]

Various work-related stressors have been shown to impair sleep quality; such stressors include unfinished work tasks, social stressors, poor leadership, perceived discrimination, and role conflict.[59] As described in the previous section, these stressors tend to have a compounding effect. Compounding job demands (and poor stress management) can lead to a steady decrease in sleep quality over the workweek, leaving you drained by the end of the week.[60] So what can be done to combat poor sleep? Research suggests that, beyond the obvious solution of getting more, good-quality sleep,[61] physical activity, recovery experiences with social support groups and possibly even wearing blue light-blocking glasses can help.[62]

Illness and Injury

A second area of physical health that OB practitioners and researchers are concerned with is illness and injury due to its connection with absenteeism and productivity loss.[64] Although COVID-19 highlighted the dangers of coming to work while sick, a whopping nine out of ten employees in one large survey admitted to going to work sick before the pandemic.[63] Although we will likely see the culture change surrounding the acceptability of working sick in the United States, many attribute the hesitance to stay home to losing sick leave and inflexible or coercive supervisors.[66]

Clearly, going into work while sick is not optimal for obvious reasons.[67] First and foremost, working close to others while sick with a contagious disease increases the risk that other team members will also become ill (and will likely increase their anxieties about working with you, especially during COVID-19).[68] Second, people are not as effective at doing their jobs when ill or injured and can slow work processes. This effect will be even greater if the illness is spread to other members of the team, who then experience the same decrements. OB professionals refer to working while ill or injured as **presenteeism**.[69]

presenteeism The act of working while ill or injured.

Myth or Science?

When You Are Working Hard, Sleep Is Optional

This statement is false. Individuals who do not get enough sleep are unable to perform well on the job. One study found that sleeplessness costs U.S. employers $63.2 billion per year, almost $2,300 per employee, partially due to decreased productivity and increased safety issues. Sleep deprivation has been cited as a contributing factor in heart disease, obesity, stroke, and cancer. It can also lead to disastrous accidents. For example, U.S. military researchers report that sleep deprivation is one of the top causes of friendly fire (when soldiers mistakenly fire on their own troops), and 20 percent of auto accidents are due to drowsy drivers. More than 158 people on Air India Flight 812 from Dubai to Mangalore were killed when pilot Zlatko Glusica awoke from a nap and, suffering from sleep inertia, overshot the runway in one of India's deadliest air crashes.

Sleeplessness affects the performance of millions of workers. According to research, one-third of U.S. employees in most industries, and more than one-quarter of workers in the finance and insurance industry, are sleep deprived, getting fewer than six hours of sleep per night (seven to nine are recommended). More than 50 percent of U.S. adults age 19 to 29, 43 percent age 30 to 45, and 38 percent age 46 to 64 report that they rarely or never get a good night's sleep on weekdays.

Research has shown that lack of sleep impairs our ability to learn skills and find solutions, which may be part of why law enforcement organizations, Super Bowl–winning football teams, and half the Fortune 500 companies employ so-called fatigue management specialists as performance consultants.

Along with sleeplessness, insomnia has been a growing problem. Recent research in Norway indicated that up to 34 percent of motor vehicle deaths during the fourteen-year study period might have been prevented if the people involved in the crashes had not displayed insomnia symptoms. Managers and employees increasingly take prescription sleep aids, attend sleep labs, and consume caffeine to either sleep better or reduce the effects of sleeplessness on their performance. These methods often backfire. Studies indicate that prescription sleep aids increase sleep time by only eleven minutes and cause short-term memory loss. The effects of sleep labs may not be helpful after the sessions are over. And the diminishing returns of caffeine, perhaps the most popular method of fighting sleep deprivation (74 percent of U.S. adults consume caffeine every day), require the ingestion of increasing amounts to achieve alertness, which can make users jittery before the effect wears off and leave them exhausted.

When you are working hard, it is easy to consider using sleep hours to get the job done and to think that the stress and adrenaline from working will keep you alert. It is also easy to consider artificial methods in attempts to counteract the negative impact of sleep deprivation. However, research indicates that we are not good at assessing our impaired capabilities when we are sleep deprived when it comes to maximizing performance and reducing accidents. In the end, there is no substitute for a solid night's sleep.[63]

Who is more likely to go to work while sick? Employees are more likely to engage in presenteeism when work forces compel them to and when they have a chronic physical condition (e.g., asthma).[70] Moreover, people are strongly compelled to work when they love their job and *want* to work.[69] Organizational culture (see the chapter on culture and change) plays a substantial role here, with cultures tending to encourage presenteeism, discourage presenteeism, or otherwise emphasize individual choice.[72] To this point, we have suggested that presenteeism is not the best choice. Some, however, suggest that it is more a matter of degree. People with chronic conditions or those with more minor illnesses can perhaps be effective when provided with flexibility and resources, functionally continuing their work.[73]

Personal and Work Risk Factors Most of us spend nearly one-third of our daily waking lives at work. Logically, our experiences at work influence what we do to promote our health and well-being. In fact, one review of nearly three hundred studies suggests that what we do in the workplace is *just as much of a risk factor* for illness as is secondhand smoke![74] Many examples abound of how workplace stressors and unhealthy behavior at work are risk factors for physical ailments.

For instance, a 21-year-old intern at Merrill Lynch collapsed and died due to working 72 hours straight.[75] Moreover, after a steel mill closed its doors for good, leaving many employees out of work, one 56-year old employee died of a heart attack shortly after due to the shock.[76]

Although there may be a direct link between what we experience at work and our health, it is more likely that people behave in unhealthy ways to cope with stressors at work. For instance, employees may skip lunch, eat convenient and unhealthy foods, smoke cigarettes, neglect their sleep needs, or abuse substances to cope with stress at work.[77] One study of nearly five thousand workers demonstrated that these behaviors were linked to many *metabolic risk factors* associated with increased risk for cardiovascular and immune system diseases. More specifically, the regular experience of hindrance stressors at work resulted in moderate increases in high-risk eating and cigarette smoking, leading to increases in worrisome, objective health indicators such as body mass index (BMI), cholesterol levels, and insulin resistance.[78] These metabolic risk factors can lead to health conditions such as *obesity*, resulting in increased company health costs, the risk for absenteeism and injury, and even prejudice and discrimination.[79] Stress at work can also lead individuals to injury, as they start to neglect safety behavior. For instance, the exhausting experiences of worrying about health and financial threats from COVID-19 led many workers to relax their safety behaviors.[80]

It is difficult for employees to engage in healthy behavior when they experience stress at work. Employees encountering high-stress levels and stressors at work can mitigate these risks through planning. Employees that plan for eating healthy and physical exercise are more likely to follow through than those acting out of convenience or impulse.[81] Moreover, programs targeted toward developing resilience (described later in this chapter) can reduce physical health risks related to stress at work.[82]

Mental Health at Work

18-3 Recognize how maladaptive mental health conditions can manifest as a consequence of stressors at work.

Just as workplace stress can affect physical health through increases in risky, unhealthy behavior, so, too, does workplace stress affect mental health at work.[81] In fact, the cost of treating employees with both physical and mental health conditions is two to three times higher than those without co-occurring illnesses.[84] In the United States, 51.5 million adults over the age of 18 reported they were suffering from a mental health disorder in 2019.[85] What is the impact on work outcomes? Conditions such as depression reduce cognitive performance 35 percent of the time at work.[86] In our discussion of mental health in the workplace, we focus on three primary areas: (1) job insecurity as a stressor, (2) workaholism behaviors, and (3) the experience of psychological distress at work, including burnout and depression.

Job Insecurity

job insecurity The perception that one's job is at risk or that one's employment is not stable.

Employees experience **job insecurity** when they perceive that their jobs are at risk or that their employment is not stable.[87] Job insecurity is a highly emotional perception that greatly affects employees' mental health, affecting sleep, depressive symptoms, and burnout.[88] Although job insecurity can reflect increased demands on the job, it is more likely signaled by a lack of social and structural resources, such as fair interpersonal treatment and communication, leader–member exchange, and support and trust from coworkers, most often in environments where unemployment is high.[89]

As a stressor, job insecurity is relatively unique. It prompts employees to do what they can to preserve their jobs, adjust their efforts to signal their viability, or

Toward a Better World

Freelancers Union: Advocating for Gig Workers Faced with Consistent Job Insecurity

In the wake of the COVID-19 pandemic, more than 48 million Americans applied for unemployment insurance. Although rideshare drivers are "gig workers," they were classified as "essential workers" by the government and permitted to continue working during the pandemic. The experience was extremely stressful for many of these workers, who faced job insecurity through plummeting demand and lack of financial support. Moreover, these drivers faced immense health concerns due to fear of infection. For instance, one Uber driver (Julie of Cincinnati, Ohio) was terrified to continue working for the rideshare company as the sole provider for her family. She recalled driving one day during the pandemic, noting that "each of the people tipped me just a little over a dollar and I'm sorry, but my life is worth more than that."

Shortly after this experience, Julie applied for unemployment. However, what is unique about this situation is that *normally* Julie would not have been eligible for unemployment because she is a gig worker. The passage of the federal CARES Act extended unemployment eligibility to gig workers during this time of crisis. Notably, many gig workers lost these benefits in states where leaders cut off Pandemic Unemployment Assistance (PUA) before the assistance was set to expire. During normal times, gig workers potentially face many hindrance stressors that adversely affect their stress levels and, ultimately, their mental health, which includes job insecurity, unclear employment status, non-reimbursed expenses, continuously declining reimbursement rates, an inability to make a living wage, competition with other gig workers, employer double standards (treating them like other employees but providing fewer resources), dishonest clients (breaching terms of the agreement and withholding pay), "hustling" to gain new clients, and no clear career advancement opportunities.

However, the picture is not all doom and gloom: As Louis Hyman writes in *Temp*, gig work involves a great deal of autonomy and independence—job characteristics that would normally be highly coveted aspects of work. However, Hyman argues that the way forward is to reconnect gig workers with the job resources and support that these workers would have received in traditional employer–employee arrangements. It is in these additional resources that the demands of gig work can be alleviated. As Hyman suggests: "Americans need life security . . . not job security." This has caused many people to begin organizing and advocating for "life security" on behalf of gig workers. However, the National Labor Relations Act in the United States currently does not apply to gig workers despite a majority expressing interest in joining a union (for instance, by one survey, 80 percent of Los Angeles ridesharing drivers). This has not stopped gig workers from uniting to advocate for better benefits and security. For instance, the Freelancers Union is the fastest-growing and largest entity (it is technically *not* a union with collective bargaining power) uniting gig workers today.

Although the 500,000 members only make up a fraction of the 56.7 million gig workers in the United States, the Freelancers Union offers free membership with many resources since the 1990s. For instance, the union offers insurance benefit options, including health, dental, term life, disability, vision, and liability. It is a source of social support and advice from experts and other gig workers, including legal and financial tools. For those members living in New York City, the union offers the use of the Freelancers Hub. Although its physical space shut its doors due to the pandemic, it is a virtual community space for New York City's gig workers.

Most notably, the Freelancers Union is working with legislators to determine how they can advocate for gig worker policy change. Rafael Espinal, the executive director of the union, notes that it is a challenge to balance all sides of the picture. Espinal suggests that the major question is "How can we create a bill that will strike the right balance between making sure that workers . . . get the justice they need but not having a negative impact on freelancers who do independent work and are happy with the freedom they currently have?" Regardless of how people view gig work, the fact is that most gig workers do experience heightened levels of strain that threaten their health as contributors to society. Indeed, the future for gig workers is uncertain despite attempts to come together and advocate for gig worker rights and enhance access to resources. But just as the gig economy increased demand for this category of workers, the systems can also adjust to support these workers and provide the resources they need to ensure manageable stress and good health.[106]

to reconsider their employment. Job insecurity can motivate employees to build stronger relations with their coworkers and supervisors to reduce the insecurity,

or alternatively, consider other places to work.[90] Interestingly, job insecurity is an especially salient stressor for gig workers,[91] and it negatively affects their job attitudes.[92] Although these workers have much greater autonomy than traditional full- or part-time employees, gig workers experience more strain and work–family conflict (discussed later in this chapter).[93] Due to the nature of their work, gig workers are prone to experience fluctuations in their workloads—demands they have to meet to ensure they are hired again and protect their valuable reputation with other clients (pressures that lead to increased strain).[94]

Workaholism

One possible response to job insecurity is workaholism (although it can also be because people really love their jobs and feel a calling to work excessively).[95] **Workaholism** involves feeling compelled to work due to internal pressures, thinking about work even when not working, and going above and beyond what is reasonably expected (to one's own detriment).[96] Leaders tend to be especially prone to workaholism. For instance, some leaders feel compelled to "sacrifice" their personal lives and recovery time to "keep the ship running," which can lead to workaholic behaviors.[97] Similarly, self-employed entrepreneurs regularly cope with job insecurity by working more than they should. They tend to earn more because of it (despite a negative impact on their health).[98] In some ways, they might seem like ideal employees. This perception might be why, when most people are asked in interviews what their greatest weakness is, they may reflexively say, "I just work too hard." However, there is a difference between working hard and working compulsively.[99]

Workaholism A maladaptive mental state characterized by feeling compelled to work due to internal pressures, thinking about work even when not working, and going above and beyond what is reasonably expected (to one's own detriment).

Workaholic behavior does not necessarily lead to more productivity than others, despite the extreme efforts involved. The strain of putting in such a high level of work effort eventually begins to wear on the person, leading to higher levels of work–life conflict, burnout, and higher blood pressure.[100] Moreover, the nature of work might change as a result of workaholic behaviors: One study of nearly two thousand dentists demonstrated that workaholic behaviors led to an increase in challenging workplace stressors along with an eventual increase in structural resources (perhaps also increasing job security).[101] Although job security might be improved by workaholic tendencies, the costs employees pay in burnout suggests that it is likely not worth the trouble.

Psychological Distress at Work

Some employees encounter psychologically traumatic experiences in their jobs. For instance, many first responders recall the horrifying incidents they must experience that lead to psychological distress. As one firefighter noted, "Today, when I lay down and sleep at night, I can still see the faces" of the tragic victims encountered on the job. "I carry that with me. I will see that the rest of my life."[102] These experiences highlight the mental health toll of burnout and depression at work.

Burnout Many employees at some point in their careers experience **burnout**, a work-related mental health syndrome characterized by emotional exhaustion, depersonalization, and reduced personal accomplishment.[103] *Emotional exhaustion* refers to feeling overextended and emotionally depleted. *Depersonalization* refers to maladaptively coping with the job through callousness and distancing. *Reduced personal accomplishment* means losing a sense of productivity or contribution on the job.[104] Some consider burnout to effectively be the "opposite" of job engagement discussed in previous chapters.[105]

burnout A work-related mental health syndrome characterized by emotional exhaustion, depersonalization, and reduced personal accomplishment.

Burnout has a moderate effect on employee outcomes, including an increase in absenteeism and turnover along with a reduction in job performance.[108] Research also shows that the effects of burnout compound. Although stressors

lead to burnout as a form of strain, the experience of burnout also leads to the emergence of newer stressors in a vicious cycle.[109] For example, being burned out can lead to reduced performance, leading to supervisor disciplinary action (a new stressor).

Moreover, some employees are more likely than others to experience burnout. Those low on emotional stability, for instance, are more likely to experience emotional exhaustion. At the same time, high extroversion in employees is linked with a lower likelihood of emotional exhaustion (along with a higher sense of personal accomplishment).[110] Women are more likely to experience emotional exhaustion than men, but men are more likely to experience depersonalization than women.[111] Furthermore, cultures characterized by tight, masculine norms (see the chapter on diversity, equity, and inclusion in organizations) tend to be more prone to burnout than looser, egalitarian societies.[112]

Depression Despite a large degree of attention, some researchers suggest that burnout is very similar in many ways to *depression*,[113] a mental health disorder characterized by sadness, loss of interest, despondency, and dejection. Depressive symptoms such as these often co-occur with other negative emotions such as anxiety and anger.[114]

Of all mental health conditions, depression is the most common mental health condition (affecting about 9.5 percent of the U.S. population annually), leading to serious difficulties at work.[115] Like workaholism and burnout, depressive states are heavily predicted by constant job insecurity (although depressive symptoms also tend to reinforce perceptions of job insecurity, with suffering employees experiencing a heightened awareness of their job insecurity).[112] Moreover, negative interpersonal interactions (e.g., bullying, social isolation) can cause employees to become depressed over time;[116] those bullied while depressed can experience a psychological sting so painful that some may even contemplate suicide.[117]

The good news is that the immediate cessation of the bullying experiences tends to reduce depressive symptoms very quickly in some cases.[115] Moreover, interventions that reduce the stigma surrounding mental health conditions and convey appreciation for employees can effectively reduce depression.[119]

Mechanisms of Health and Stress

18-4 Compare the four major stress and health theories.

Now that we have established the nature of stress and health in organizations, let us describe *how* they emerge. Although there are many compelling health and stress theories in OB, we focus on four of the most popular in this section: *conservation of resources, demand-control-support, job demands-resources,* and *effort-reward-imbalance.*[120]

Conservation of Resources

Conservation of resources (COR) theory suggests that employees strive to obtain, foster, retain, and protect the resources and things they value.[121] **Resources** are factors within an individual's control that can be expended toward fulfilling desires, attaining goals, or meeting task demands. Employees must invest time and energy to gain resources and protect or replenish resources from loss. Concerning stress, employees are more aware of resource losses than resource gains. In other words, a missed opportunity is not as concerning as a loss of a cherished resource. However, when resources have been lost, employees become motivated to replace what was lost. Moreover, when people are overextended or exhausted, they become desperate, defensive, aggressive, and irrational in their pursuit of regaining or replenishing what was lost.[122]

resources Factors within an individual's control that can be expended toward fulfilling desires, attaining goals, or meeting task demands.

Research has been supportive of COR theory. Diminished job control and social support have been linked with burnout, suggesting that a loss of resources leads to strain in the form of burnout.[123] As another example, in the presence of stressors, employees tend to engage in less voice behavior (see the chapter on power and politics), supporting the resource conservation tenant of COR theory.[124] Moreover, seeing other coworkers treated unfairly or even becoming aware of your romantic partner's job insecurity can result in resource loss. Employees may be more likely to lose self-control or experience strain following these losses of resources.[125] Even when these stressors are "good" for the organization, like an enhanced organizational reputation, the demands associated with performing at a high level can threaten employee resources and lead to turnover.[126]

Finally, research on leaders in organizations tends to be one area that has garnered a lot of support for COR theory. Leaders tend to conserve their resources by selectively building relationships with their followers (i.e., LMX differentiation).[124] Moreover, they conserve resources when strategically deciding when to try something new (a resource-intensive task) or defaulting to the old ways of doing things.[128] Moreover, leader transformational leadership behavior (see the chapter on leadership), although beneficial for followers, can be quite taxing on leaders, eventually leading to resource losses, emotional exhaustion, and turnover.[129]

Effort-Reward Imbalance Model

Although falling out of favor in recent years, the *effort-reward imbalance* (ERI) suggests that employees will experience strain when they put in a great deal of effort for little reward. In turn, employees are motivated to resolve this discrepancy by either (1) putting in less effort or (2) working to maximize or increase the reward.[130]

Although some research on the ERI model supports that imbalance leads to decreased engagement and increased turnover intentions,[131] the issue lies in what efforts and rewards we are talking about. Although we may immediately jump to salary when thinking about reward—research found that job security and a sense of competence were related to health to a degree *greater than* salary.[132]

Moreover, some facets of effort or reward may depend upon the job in question. For instance, research on bus drivers suggests that effort could involve dealing with road conditions, or interacting with passengers, as some examples.[133] Clearly, a bus driver who perceives fewer rewards on the job would be more likely to give up on customer service rather than dealing with road conditions (when everyone's lives are at stake!).

As another issue, at what point does the imbalance between effort and reward becoming meaningful or compelling enough to cause changes in the stress experience? It is hard to imagine *any* imbalance causing distress. It is also hard to pinpoint which is the bigger contributor to the imbalance: effort or reward.[131]

Job Demand-Control-Support Model

An upcoming project deadline at work is not so bad when you have support from coworkers and supervisors, along with control over how you attain it. The *job demand-control-support (JDCS)* model suggests strain is a function of three factors: demands, control, and support.[135] **Demands** are the responsibilities, pressures, obligations, and uncertainties that individuals face in the workplace. *Control*, similar to autonomy discussed in previous chapters (see the chapter on

demands Responsibilities, pressures, obligations, and even uncertainties that individuals face in the workplace.

motivation theory), refers to the degree to which employees have discretion over how to do their jobs. *Support* (similar to the perceived support constructs discussed in the chapter on attitudes) is essentially perceptions of assistance provided by the organization, supervisor, and coworkers. The main tenant behind the JDCS model is that any negative effects of demands on strain can be offset or buffered by control and support, as shown in Exhibit 18-4.

Research on the initial JDCS model has not been very supportive of the theory in general.[136] However, the "buffering" tenant of the theory has been supported in prior work,[137] and demands and control have both been linked separately to the increase and decrease in mortality odds, respectively.[138] Many have suggested alterations to the theory to remedy these issues. For instance, one meta-analysis supported the JDCS, but only when various sources of support were disentangled (e.g., supervisor support mattered more than coworker support).[139] Taking this "disentanglement" approach further, another meta-analysis found that whether the JDCS was supported depended upon several factors, including the employees' gender, nationality, and occupations.[140] Moreover, some work has "disentangled" the nature of demands, separating challenge and hindrance stressors as demands (see our earlier discussion). In these studies, the JDCS was only supported for *hindrance* stressors and not challenge stressors because challenges are not viewed negatively by everyone.[141]

Job Demands-Resources Model

When you undergo your annual performance review at work, you feel stress because you confront challenge and hindrance *demands*. A good performance review may lead to a promotion, greater responsibilities, and a higher salary.

Exhibit 18-4 The Job Demand-Control-Support Model

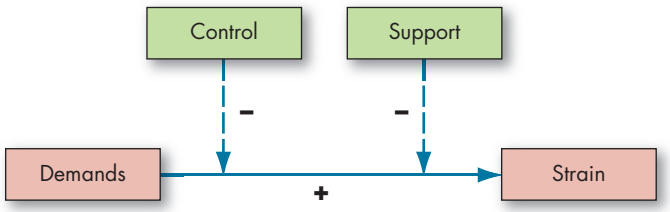
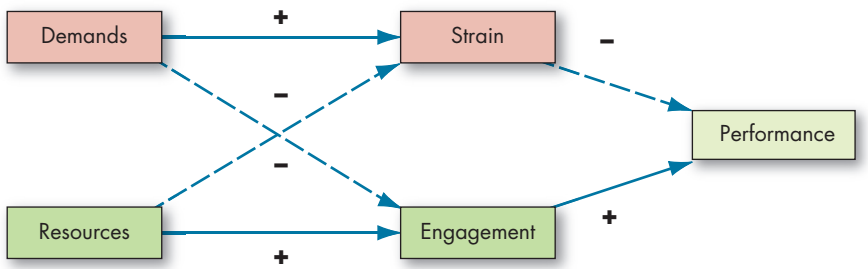


Exhibit 18-5 The Job Demands-Resources Model



Based on A. B. Bakker and E. Demerouti, "Job Demands-Resources Theory: Taking Stock and Looking Forward," *Journal of Occupational Health Psychology* 22, no. 3 (2017): 273–85.

A poor review may prevent you from getting a promotion. An extremely poor review might even result in your being fired. To the extent you can draw on *resources* to meet the demands placed on you—such as preparing for the review, putting the review in perspective (it is not the end of the world), or obtaining social support—you will feel less stress and experience less strain. The *job demands-resources (JDR)* model depicted in Exhibit 18-5 combines elements of COR theory and the JDCS to suggest that demands and resources both contribute to performance through their distinctive effects on strain (e.g., burnout) and engagement.[142]

The JDR is one of the most popular stress and health theories to date, and research tends to support its utility. Both demands and resources lead to strain (e.g., burnout) as expected.[143] However, the relationship between demands and engagement does not tend to be as strong as the other relationships in the model, as sometimes challenging demands (e.g., challenge stressors) can lead employees to become engaged.[144] Moreover, the influence of resources often depends on the organizational climate, supportive leadership, and psychological safety in the team or organization: Will others look down on you if you draw on resources?[145] Researchers have also supported the JDR in the safety context, with strain leading to safety incidents and engagement in compliant safety behaviors, reducing these incidents' likelihood.[146] The JDR has even been supported in populations of students *and* teachers.[147]

In general, the JDR helps us understand that strain and engagement are often the results of a balancing act between drawing on resources and meeting demands. It can help us explain, for instance, why people with high levels of educational attainment are not more satisfied with their jobs: Although the resources are greater with higher education (e.g., income, autonomy), the demands are also greater (e.g., longer hours, higher pressure).[148]

Allostasis The discussion so far may give you the impression that individuals seek a steady state in which demands match resources perfectly. While early research emphasized such a *homeostatic*, or balanced, equilibrium perspective, it has now become clear that no single ideal state exists. Instead, it is more accurate to talk about *allostatic* models where demands shift, resources shift, and systems of addressing imbalances shift.[149] By **allostasis**, we work to find stability by changing our behaviors and attitudes. It all depends on the *allostatic load*, or the cumulative effect of stressors on us, given the resources we draw upon.[150]

allostasis Working to change behavior and attitudes to find stability.

For example, suppose you feel especially confident in your abilities and have lots of support from others. In that case, you may increase your willingness to experience strain and be better able to mobilize coping resources.[151] This would be a situation where the allostatic load was not too great; in other cases where the allostatic load is too great and too prolonged, we may experience psychological or physiological stress symptoms.

Demand-resource preferences change in cycles. You have experienced this when you sometimes just feel like relaxing and recovering. At other times you welcome more stimulation and challenge. Much like organizations are in constant change and flux, we respond to stress processes by continually adapting to internal and external sources, and our stability is constantly redefined. Demands also change predictably over time themselves. One study of workers across the life span found that strain is caused partly by financial and economic demands for younger workers—but for older workers, the demands associated with strain are more associated with caregiving demands (e.g., parenting, eldercare).[152]

Work–Life Balance

18-5 Differentiate between work–life conflict and work–life enrichment

Katharina Boesche is a self-employed lawyer struggling to juggle work and family responsibilities during the COVID-19 pandemic. Mandatory school closures resulted in her three children being home, which has made it difficult to find quiet time to work. Boesche works in the early morning hours (between 4 a.m. and 8 a.m.) or late at night. As a result of these stressors, Boesche feels very strained, burned out, and exhausted. Boesche's experiences reflect the struggles in managing one's work and home lives.[153]

In this section, we describe the nature of *work–life balance* in organizations while recognizing that we do not mean "balance" as a state of equilibrium—more like a "balancing act."[154] To this day, most employees aspire toward the ideal of balance, and it is an important predictor of work and family attitudes and performance.[155] We describe first the nature of boundaries and the transitions that occur across them. Next, we describe two forms of "spillover" which have implications for employees: conflict and enrichment. Finally, we discuss the role that supportive work policies play in assisting employees in managing and prioritizing their valued commitments. But first, where does the world stand on the issue of work–life balance?

The State of Work–Life Balance: A New Normal?

The COVID-19 pandemic has put work–life balance, boundaries, conflict, and enrichment in the spotlight. But even before the pandemic, the fine line between work and home life had been consistently and progressively blurring over the years. Employees clung to their smartphones. (Some researchers have described them as "adult pacifiers.") They strived to be accessible and connected to coworkers 24/7 following the turn of the millennium.[156] Strong norms compelled many to sacrifice their personal lives and always be "hustling" to achieve success without paying any mind to boundaries, stress, or health implications of such decisions.[154]

But with this jarring transition, a sizable portion of the populace worldwide became "remote workers"—seemingly overnight. As Kevin Collins, CEO of Charli, noted: "The global pandemic has changed the way we work, blurring what was already a hazy divide between life and work while raising questions around the long-term impacts on our mental wellness."[158] Of course, many managers and executives are dismissive of these claims. As David Solomon, CEO of Goldman Sachs, said: "It is not a new normal. It is an aberration that we are going to correct as quickly as possible."[159]

Regardless, before the pandemic, employees viewed work–life balance as a unicorn or a life goal to aspire toward[160]—now, many are considering this old perspective to be problematic. Instead, many think of it as something much more flexible, enigmatic, and nebulous. From a view that work–life balance is like an achievement to aspire toward (enjoyed by the select few corner-office executives in the upper echelons), current thinking may be shifting toward considering it as a continuously balancing process. During this process, we remain self-aware, prioritize, and shuffle our demands and commitments in a way that meets our needs and that works for us.[161]

Work–Life Boundaries

The concepts of role conflict and COR theory are certainly relevant to work–life issues because of our competing roles at work and home and our finite resources to address demands in each context. However, the concept of *work–life boundaries* (also sometimes called borders) is unique to research in this area.[162]

Work–life boundaries refer to the lines that demarcate our lives. We move and transition between these domains both physically and/or psychologically, and people, things, and communications from some domains can move across boundaries and serve as interruptions in our daily lives (e.g., your coworker calling you on vacation or even stepping on your child's LEGO right in the middle of a conference call).

At first glance, this may seem like a relatively simple concept. However, boundaries are complicated because people have preferences for how integrated they want their work and home lives to be and how willing they are to "move" across domains (e.g., taking time off to deal with personal issues).[163] Furthermore, people (and their job descriptions) are often limited in negotiating these boundaries (does the job allow flexibility and control of boundaries? or do they have to be in one space, free of interruptions, for extended periods?).[164] Those who prefer or practice work–life integration tend to be more likely to move between domains easily (e.g., allowing friends to visit them while at work, answering work emails at home while preparing dinner, and frequently talking about their home lives at work and vice versa).[165] On the other hand, those who prefer clear boundaries are more likely to maintain strong boundaries and psychologically detach from one domain when in the other (e.g., turning their smartphone off once they are off the clock). Moreover, when employees engage in *boundary management,* they enact strategies or tactics to negotiate the time, space, and roles they play in each of the domains.[166] These tactics can come in one of three forms: physical, behavioral, and psychological (examples are shown in Exhibit 18-6).

How well do people manage the boundaries between work–life domains? Employees high in the personality trait of conscientiousness (see the chapter on personality and individual differences) are more likely to perceive that they have greater boundary control and feel better equipped to manage cross-role interruptions. Those with low emotional stability, on the other hand, are more likely to view the cross-role interruptions as intrusive and stressful.[167] Moreover, social identity also plays a role. Those who strongly identify with their family units tend to treat boundaries more strictly and as less permeable,[168] looking to ensure permeability for the more valued domain while at the same time protecting it from intrusion from other domains.[169] Finally, boundary management might be

Exhibit 18-6 Boundary Management Tactic Examples

Tactic	Form	Example
Physical Tactics	• Establishing time boundaries • Marking work spaces • Facilitating boundary transitions	*I always leave work at 5 p.m. to be home in time for dinner.* *I will always work in the second bedroom, and if the door is shut, do not come in.* *I bought a house a five-minute bike ride away from where I work.*
Psychological Tactics	• Prioritizing and goal-setting • Making compromises	*When the clients are in town this week, I will spend more time building relationships with them.* *I will make my working late all week up to the rest of my family by going to the movies with them on Friday.*
Behavioral Tactics	• Setting expectations • Negotiating resources	*Please respect my time by not calling me on vacation unless it is an emergency.* *I will ask my coworkers if they want to come to a family event with me this weekend, where we can discuss the new project.*

Based on T. D. Allen, E. Cho, and L. L. Meier, "Work-Family Boundary Dynamics," *Annual Review of Organizational Psychology and Organizational Behavior* 1 (2014): 99–121.

a skill that gets better with age. Multiple studies among bank employees demonstrate that older workers set and maintain stronger boundaries, which leads to better work–life balance.[170]

Regardless of traits, unwarranted interruptions in either domain (e.g., boundary violations) can result in frustration and other negative affective reactions.[171] Moreover, research on (newly) remote workers during the COVID-19 pandemic and other employees with high technology demands suggests that employees with segmentation preferences who engaged in clear physical tactics (e.g., establishing explicit work spaces, turning their devices off during nonwork hours) achieved better work–life balance than other employees.[172] A lack of boundaries also seems to matter: Work–life integration, for instance, has been shown to impair mental health because individuals do not have time to "recharge" from adverse experiences in either domain.[173]

Work–Life Spillover

In the prior section, we described how people set boundaries between their work and nonwork lives. Sometimes, elements from one domain will directly impact the domain we are currently in (e.g., a parent bringing you lunch at your office). However, sometimes the impact of one domain on another may be more subtle and psychological. For instance, **work–life spillover** occurs when our psychological responses to one domain (e.g., our positive or negative moods) are carried over into another domain and impact it in some way.[174]

work–life spillover When psychological responses to one domain (e.g., positive or negative moods) are carried over into another domain and impact it in some way.

For example, many people spend a lot of time commuting—about 27.6 minutes one-way in the United States. Moreover, about 5 percent of all U.S. workers use some form of public transportation.[175] The commute itself serves as a domain that can spill over to work or life domains (e.g., a bad traffic jam can leave you in a bad mood and late for work).[176]

Sometimes, the spillover we experience *crosses over* to other people.[177] For instance, if you encountered several angry customers and big crowds at your movie theater in the afternoon, you may be more irritable and snap back at your friends when you hang out with them later. As we describe them, *spillover and crossover* can reverberate through a persons' social network. For instance, let us say that an individual experiences a negative interaction with an abusive supervisor at work. Their negative emotions at home that have *spilled over* from work can *cross over* to their partner. Then their partner might experience *spillover* when they bring these negative emotions to their place of work.

Moreover, when we experience spillover (as conflict or enrichment), the experience can amplify attitudes toward both domains (see the chapter on job attitudes). In other words, receiving a long call from a supervisor right in the middle of a family reunion is likely to leave you dissatisfied with the time spent with your family (because of the interruption) *and* dissatisfied with your job (because of your displeasure at your supervisor's call).[178] In the sections that follow, we discuss the positive (i.e., enrichment) and negative (i.e., conflict) forms of spillover in organizations.[179]

Work–Life Conflict Negative spillover (e.g., work–life conflict) grabbed management's attention in the 1980s, largely due to the increased entry into the workforce of women with dependent children. In response, most major organizations took action to make their workplaces more family-friendly.[180] They introduced onsite child care, summer day camps, flextime, job sharing, leave for school functions, telecommuting, and part-time employment. But organizations quickly realized negative spillover was something that affected all employees.

Heavy workloads and increased travel demands, for instance, made it increasingly hard for parents to meet both work and personal responsibilities.

Reviews on work–life conflict suggest that it can be detrimental in several ways.[181] It can negatively affect job attitudes and performance. It can even lead to more objective work outcomes, negatively impacting manager performance ratings and upward mobility (e.g., promotions).[179] It can negatively affect home life by leading to poor life, leisure, family, and marital strain, and strain causes conflict.[183]

What causes work–life conflict? Typically, work factors tend to more strongly influence work spilling over to life, and life factors tend to more strongly influence life spilling over to work.[184] Negative job attitudes, long hours, little support, inflexibility, and job stress lead to life conflict.[185] On the other hand, family stress and interpersonal conflict, time spent caring for family members, and having young children are all associated with work conflict. Among these antecedents, stress experienced in either domain appears to be the biggest factor.[186]

Personality traits and individual differences also appear to matter. Employees low on emotional stability and high in negative affect (see the chapters on personality and individual differences as well as emotion and mood) tend to perceive less work–life conflict.[187] Moreover, employees who believe they have control over their circumstances and who are high in self-efficacy (see the chapters on motivation) are better able to handle the conflict.[188] Considering gender, a vast amount of research suggests that gender does not influence the amount or degree of work–life conflict in either direction—everyone experiences it. However, some research does support the notion that men spend more time at work and less time with their families and are perhaps not as good at establishing boundaries as women (leading to more conflict).[186]

Finally, the impact of work on the life domain does not appear to vary across cultures. However, the impact of life on the work domain *does* appear to vary by several cultural characteristics. Life-to-work conflict appears to be stronger in collectivist societies and those with larger economic gender gaps.[190] However, the conflict tends to have less of an effect on work–family satisfaction in these societies.[191] Moreover, work unit and family support appear to reduce the occurrence of work–life conflict in cultures that perceive support as a useful resource for people to draw upon.[192]

Work–Life Enrichment Work–family spillover also has a positive side.[193] Jeff Bezos, Amazon chair and former CEO, once noted that if he was happy at home, he would bring tremendous energy with him into the office. Furthermore, if he was happy at work, he would also bring tremendous energy with him into his home life.[194] Just as work and family life can cause conflict, so too may it cause enrichment. An excellent presentation, compliment from a customer, or raise from your supervisor can lead these positive experiences to spillover to other domains of your life. Similarly, a championship win for a weekend sports league, a mini-vacation to a fun destination, or even a romantic date night with a partner can spill over to work.[195]

But what does the research say on enrichment? Unfortunately, conflict has been given much greater attention than enrichment. However, research does suggest that both types of enrichment (i.e., work-to-life and life-to-work) lead to positive job and life attitudes, increased engagement, decreased strain, better mental and physical health outcomes, and increased performance and organizational citizenship behavior (OCB).[196] Moreover, just like work–life conflict, work variables tend to more strongly influence

works enrichment of life, and life variables tend to more strongly influence life's enrichment of work.[197]

Regarding predictors of enrichment, research suggests that both forms of enrichment are primarily the result of increased work engagement (maybe Bezos was on to something?). However, they are also a function of the social support received from family and coworkers and the degree of autonomy on the job.[198] Just like with work–life conflict, personality also has an effect. However, different traits predict enrichment, including extroversion and openness to experience.[199]

Flexible and Supportive Policies

Time pressures are not the primary problem underlying work–life conflicts.[200] The psychological incursion of work into the family domain—and vice versa—leaves people worrying about personal problems at work and thinking about work problems at home, creating conflict. This suggests organizations should spend less effort helping employees with time management issues and more effort helping them segment their lives, navigate boundary transitions, and facilitate enrichment between both domains.

Flexible and supportive policies, such as keeping workloads reasonable, reducing work-related travel, and offering onsite high-quality child care, are examples of practices that can help in this endeavor.[198] Leaders play a large role here—encouraging followers to use supportive policies (and playing a part in establishing them), establishing high-quality exchange relationships (LMX; see the chapter on leadership) with followers, and ultimately enabling followers in their pursuit of balance and boundary management.[199] As a side note, positive leadership behaviors (e.g., servant leadership) themselves reduce stress and improve health outcomes on their own as well.[203] In general, perceptions of family-supportive leadership are more important than more general perceptions of perceived organizational and supervisor support (see the chapter on job attitudes) in reducing work–family conflict.[204] Moreover, employees (especially cohabitating and parenting employees) tend to react positively to these policies, experiencing heightened job attitudes as a result.[205] In addition, following the spillover-crossover effects discussed in the previous section, these policies are so powerful that they can crossover and positively affect the employees' *partners and family members' work and careers*.[206]

Not surprisingly, people differ in their preference for scheduling options and benefits.[207] Some prefer organizational initiatives that better segment work from personal life, like flextime, job sharing, and part-time hours. These initiatives allow employees to schedule work hours less likely to conflict with personal responsibilities. Others prefer initiatives that integrate work and personal life, such as gym facilities and company-sponsored family picnics. On average, most people prefer an organization that provides support for boundary management. Organizations are modifying their workplaces with scheduling options and benefits to accommodate the varied needs of a diverse workforce. Employees at the SAS Institute have onsite child care, a health care and fitness center, and other firms offer perks ranging from flexible scheduling, supportive technology, required vacation time, and remote work options.[208] Slalom, number three in 2021 on *Glassdoor's* Top Companies for Work–Life Balance list, offers *guaranteed* evenings free to spend as one sees fit.[209] Exhibit 18-7 lists some other initiatives over the past decade that have helped employees reduce work–life conflicts, many of which have been described in-depth in the chapter on motivation application.

Exhibit 18-7 Work–Life Initiatives

Time-based strategies	• Flextime • Job sharing • Leave for new parents • Telecommuting • Paid time off	Management consulting firm A. T. Kearney's Success with Flex program allows for schedule adjusments, telecommuting, and "hybird" positions. At biopharmaceutical firm AbbVie, 98% of employees use a flextime schedule. Cisco provides job-sharing and videoconferencing facilities to minimize needs for travel away from family. Deloitte offers employees 3–6 months sabbatical at 40% salary, and they have 40 paid days off per year.
Information-based strategies	• Work–life support • Relocation assistance • Elder care resources • Counseling services	Blue Cross Blue Shield of North Carolina provides networking opportunities to remote workers. Hallmark offers employees monthly meetings to talk about career management for women. Johnson and Johnson promotes weekends free of e-mail. Hewlett-Packard offers counselors, mentors, and $5,000 annual tuition aid.
Money-based strategies	• Insurance subsidies • Flexible benefits • Adoption assistance • Discounts for child care tuition • Direct financial assistance • Domestic partner benefits • Scholarships, tuition reimbursement	Accenture offers a $5,000 adoption assistance benefit. Carlson offers employees scholarships of up to $20,000 to attend the University of Minnesota's Carlson School of Management. Citi employees can save up to $5,000 per year in pretax dependent care accounts, with a match of up to 30% from the company. Colgate-Palmolive provides up to $10,000 per year in annual tuition aid for job-related courses. Prudential employees who are caregivers can use 100 hours of dependent backup care and six hours of geriatric care management services annually.
Direct services	• Onsite child care • Fitness center • Summer child care • Onsite conveniences • Concierge services • Free or discounted company products	Abbott provides a child-care center that serves 800 and discounts for 2,800 day care facilities. Companies like AOL and Verizon have onsite fitness centers and discounts at gyms nationwide. Bristol-Myers Squibb offers full-time, part-time, and backup care for kids up to age 5, and summer camps for older children. Turner Broadcasting offers a caregiver concierge to arrange babysitting, dog walking, and elder companions. REI employees can participate in a program that offers large discounts on company products.
Culture-change strategies	• Establishing work–life balanced culture; training managers to help employees deal with work–life conflicts • Tie manager pay to employee satisfaction • Focus on employees' actual performance, not face time	At American Express, employee networks have been established to address issues directly. At business communication company Slack, employees are encouraged to "work hard and go home." "W. L. Gore & Associates company slogan reads, "We do not manage people, we expect people to manage themselves." Pearson developed a Flexible Work Options Accountability Guide that trains managers in the use of flextime for their employees.

Sources: Based on "2014 100 Best Companies," *Working Mother*, http://www.workingmother.com/best-company-list/156592, accessed July 21, 2015; "100 Best Companies to Work For," *CNNMoney*, www.money.cnn.com, accessed June 18, 2013.

Managing Stress and Health

18-6 Describe individual and organizational approaches to managing stress at work.

What should we do about stress? Should we do anything? Because low to moderate amounts of challenging stressors can be functional and lead to higher performance, management may not be concerned when employees experience them; however, employees are likely to perceive even low levels of stress as undesirable (or see the absence of a challenge as boring). What management considers "a positive stimulus that keeps the adrenaline running" could be very likely seen as "excessive pressure" by the employee.

Regardless, stress can lead to poor outcomes that even managers should be aware of; for example, research on more than four thousand caregivers across thirty-five different hospitals suggested that during a typical twelve-hour shift without breaks, hand-washing and safety compliance were reduced by 8.7 percent.[210] Moreover, health and safety professionals suggest that there may be a need for management to be more *hands-on*. For instance, translating evidence-based health and safety innovation into practice is often glacially slow, merely presenting information without telling people what to do with it. Poor implementation has often been deemed a waste of money when done incorrectly.[211] Keep this example in mind as we discuss individual and organizational approaches toward managing stress.[212]

Individual Approaches

An employee can effectively take personal responsibility for managing their health and stress levels through coping practices and recovery experiences. Doing so can have a downstream effect on performance, OCB, CWB, attitudes, and health at work.[213] Time management techniques, physical exercise, relaxation techniques, and social support networks are individual strategies that have proven effective.[214]

But before we proceed, it is important to note that the way you approach stress management matters: You should not necessarily be trying to actively prevent or avoid stress, but instead, you should be trying to actively recover, relax, and refresh.[215] Moreover, we are not introducing these individual approaches to suggest that the onus for stress management is entirely on employees—in fact, many of these individual approaches can be facilitated and enhanced by organizational policies that support these approaches.

Developing Time Management Skills Many people manage their time poorly. The well-organized employee may very well accomplish twice as much as the person who is poorly organized. For instance, research on university professors suggests that time management skills and decisions affect work–family balance, job attitudes, and performance.[216] Moreover, studies on elite athletes suggest they are experts in time management who continuously revisit their commitments and adapt to new demands (even when they are already strained and fatigued).[217]

A few of the best-known *time management skills* are: (1) staying organized through calendars, project management software, and to-do lists (schedule time for rest and recovery!); (2) prioritizing tasks, duties, and responsibilities (while working on [or delegating] them in order of priority); and (3) setting temporally realistic long- and short-term goals.[218] On the other hand, the worst time management skills (which some people mythically associated with performing better) are (1) working faster and (2) working longer.[219] Time management skills can help minimize procrastination by focusing efforts on immediate goals and boosting motivation even in the face of less enjoyable tasks.[220] Furthermore, psychological techniques such as self-distancing from future stressors can help you adaptively cope with time pressure.[221]

Focusing on Mental Wellness and Physical Fitness Physicians have recommended noncompetitive *physical exercise*, such as aerobics, walking, jogging, swimming, and riding a bicycle, to deal with excessive stress levels and promote physical and mental health.[222] These activities decrease the detrimental physiological responses to stress and allow us to recover from stress more quickly.[223] The physical, emotional, cognitive, and behavioral benefits may translate into better performance at work.[221] Exercise can also help buffer the negative spillover effects of work–life conflict and improve work–life balance perceptions, even in the presence of poor sleep.[225] Beyond its strain reduction benefits, physical exercise

can reduce the impact of others' unethical or unfair behavior on you—and also make you less likely to be deviant yourself.[226]

Research shows that even low-intensity activity, such as walking in a park during lunch,[227] can improve moods along with other emotional benefits (even for people who doubt they will help).[228] However, there is some credence to the notion of "no pain, no gain": High-intensity exercise results in better recovery experiences (from work), reduced negative affect, and less rumination about stressors.[229] Moreover, some research even suggests that physical fitness can help enhance *intelligence* and *cognitive skills*.[230]

Many organizations offer wellness programs (which we discuss later) that promote physical fitness, but not all do. That is why employees may want to consider establishing their own self-care routines. For instance, one might involve putting on some music (which may lead to better workouts);[231] powering up an electronic activity tracker (which can reduce strain and increase control perceptions);[232] unwinding with some exercise, maybe even with coworkers or friends;[233] and rewarding yourself to keep coming back to the activity.[234] However, everyone is different, and what works for one person may not work for another. Employees and supervisors must support one another and refrain from body-shaming or ostracism based on physical features.

resilience Resistance to the adverse effects of stress and strain.

Building Resilience **Resilience** involves resistance to the adverse effects of stress and strain.[235] Resilience is especially important as a form of preparation for crises, like working remotely during the onset of a global pandemic to the sudden immersion in armed combat.[233] Although research and practice differ in how they approach resilience, a recent approach has classified resilience skills as follows: (1) emotional resilience (e.g., fostering positive emotions, developing emotion regulation skills, and facilitating social connection); (2) resilient thinking (e.g., flexible thinking, optimistic perspective); and (3) balance and recovery abilities (e.g., self-care behavior, prioritizing and balancing demands).[237]

Outside of more extreme, stressful contexts, resilience can also be beneficial in employees' day-to-day lives. For instance, through developing resilience, frontline employees can better cope with customer incivility and mistreatment from coworkers and supervisors.[238] Employees can also learn to weather the storms of interpersonal conflict through *relationship resilience*, learning to cope with letdowns and disappointments in relationships, forgive one another for breaches of trust, and keep advocating for their needs without becoming defeated.[239]

Developing resilience is possible over time through practice, coaching, and training (although its effects tend to be more temporary than other individual approaches).[240] Much research has demonstrated that resilience is very similar to stress management training. It can involve exposing employees to stressors so that they become accustomed to them.[241] Otherwise, it can involve teaching employees self-regulation, stress management, and emotion regulation skills.[239] In general, the stress management aspects of resilience training can have positive workplace outcomes, such as improved mental health and job satisfaction.[243]

Practicing Relaxation and Mindfulness Employees can teach themselves to reduce tension through *relaxation techniques* such as meditation, mindfulness, and deep breathing.[241] The objective is to reach a state of deep physical relaxation, focusing all your energy on releasing muscle tension.[245] Deep relaxation relieves strain;[246] provides a pronounced sense of peacefulness; and produces significant changes in heart rate, blood pressure, and other physiological factors.[247] Indeed, research reviews on thousands of employees suggest relaxation techniques can help manage stress and reduce burnout.[245]

Furthermore, the use of relaxation techniques during the day (and a lack of frustrating events) can help you relax when you get home—otherwise, you may have trouble doing so.[249] Even very short *microbreaks* have been demonstrated to have an effect on employee stress relief and energy.[250] You might be tempted to think that complete detachment from work, or rigid boundaries between your work and leisure life, is good; however, research suggests that those who are *recovering ponderers*, or who do not completely detach and ponder over problems they need to resolve at work (but still engage in relaxation activities), tend to *both* be engaged *and* experience a substantial decrease in stress.[251] In other words, there may be some benefit to treating boundaries flexibly.

Another technique, **mindfulness**—receptively paying attention to and being aware of the present moment, events, and experiences—has become popular in organizations.[252] (If you are interested in trying out mindfulness approaches for yourself, see the "Experiential Exercise" in the chapter on emotions and moods.) Mindfulness has roots in traditional Buddhist meditative techniques—in fact, it is the literal translation of the Vedic word *sati*, or "intentness of mind."[253] Claims of the impact of mindfulness have been quite head-turning. For example, past research suggests that mindfulness can slow aging, bolster test performance, and facilitate neuroplasticity (i.e., producing actual changes in the brain).[254] Moreover, there is reason to be skeptical.[255] Many mindfulness studies do not agree about how they conceptualize mindfulness and do not use the best methodological practices and measures.[256]

mindfulness Reception, attention, and awareness of the present moment, events, and experiences.

Proponents of mindfulness suggest that the key mechanisms responsible for its effectiveness can be found in separating oneself from the moment, decreasing the use of automatic thoughts, and increasing awareness of one's own body.[257] Moreover, forms of specialized mindfulness mediation for leaders have been suggested (which focuses on their reception, attention, and awareness to how they can improve the lives of themselves and others), with research showing that leaders can experience better relationships, inner growth, enhanced well-being, and increased productivity as a result.[255] Furthermore, some people are inherently "better" at mindfulness than others and tend to be more receptive, attentive, and aware of the present moment as their "default mode."[257] These individuals tend to experience more positive motivational states and job attitudes on the job, less strain, and better performance.[260]



These office workers at Paternoster Square, London, are dealing with the impact of job stress by playing table tennis during their lunch hour.

Source: GRANT ROONEY PREMIUM/Alamy Stock Photo

Despite skepticism, the empirical research (outlandish linkages and claims aside) is quite promising.[261] For instance, mindfulness can help reduce unethical behavior—even without any instruction to behave ethically—because it leads people to adopt a compassionate state.[262] Reviews and meta-analyses of randomized controlled trials (a gold-standard methodology used in the medical field) found that mindfulness appreciably reduced stress, anxiety, strain, psychological distress, chronic pain, depression relapse, and addiction—and improved well-being and sleep quality.[260] Through hundreds of studies, it has also been linked to many other outcomes relevant for OB, including intrinsic motivation (although it can impair immediate task motivation)[264] and emotional regulation.[265]

Seeking Social Support As we have noted, friends, family, or work colleagues can provide an outlet when stress levels become excessive. Expanding your *social support network* enables you to find someone to hear your problems and offer a more objective perspective on a stressful situation (i.e., emotional support) or help you with some of your workload (i.e., instrumental support).[266] Research suggests that both emotional and instrumental support are highly related and just as effective at influencing important workplace outcomes—[267] although

An Ethical Choice

Talking About Mental Health Without Overstepping Boundaries

Managers have a responsibility to create an inclusive and safe environment where employees feel that they can be their authentic selves. As research shows, feeling authentic at work ultimately leads to better performance, engagement, retention, and well-being. Employees want organizations to address mental health: For example, 86 percent of individuals surveyed believe that an organization's culture should support mental health. However, talking about mental health, particularly at work, can feel daunting. Furthermore, it is easy for a cycle to set in where employees refrain from discussing mental health at work, leading to greater stigmatization of the topic. Unfortunately, roughly 60 percent of employees have never spoken to someone at work about their mental health status. For employees to break this cycle, issues surrounding mental health should be discussed and addressed proactively.

The question is how to go about discussing a sensitive topic without overstepping boundaries? Here are three practical steps:

- **Avoid trying to fix people.** Although leaders are usually successful because they can solve difficult problems, if employees feel that you are attempting to "fix" them, your attempts to offer help may backfire. They may feel less confident and begin to question their competence. Instead, provide employees with suggested resources or simply ask the employee, "What would be most helpful for you right now?"
- **Discuss health holistically.** It probably seems normal to discuss the headaches you have been experiencing or your seasonal allergies with your coworker. However, discussing one's mental health is often less common. Making an effort to ask about someone's mental health can go a long way in normalizing this topic. Sharing your own struggles can also help create a more psychologically safe environment in which your coworkers feel more comfortable being open about their own mental health.
- **Listen more than you talk.** Active listening is not as easy as it may seem. The listening process is marred by the presence of biases, distractions, and judgments. Focus on your colleague's experience and remember to separate it from your own. Rather than fixating on the details and how you might solve their problems, remember that you are there to support them and listen. Resist the urge to talk *prescriptively*.

Check-the-box solutions like employee assistance programs (EAPs) are common but not enough when it comes to supporting employees' mental health. What employees really want is a more accepting and open culture that includes clearer information about the resources they can use when they need extra support.[274]

who is providing support seems to make the difference (supervisors who are readily available to help are the most valuable).[268]

Sometimes, however, this emotional support produces the opposite effect:[269] If you do not try to expand your network and instead ruminate with similarly stressed friends, you can get caught in a vicious cycle.[270] That is why it is so important to be proactive and try to address your stress head-on. But apart from rumination, support from family, friends, or spouses who help you recover from stressful work experiences can be mutually beneficial.[271] To give more effective social support to your peers and colleagues, try building others up, to help them understand their situation better and feel more capable of managing their situation.[272] Moreover, some people are more receptive to "visible" social support than others (e.g., stubborn, independent people sometimes do not want to be helped despite needing it). If you can, you may be able to help them in an "invisible" way.[273]

Organizational Approaches

Several organizational factors that cause stress—particularly task and role demands—are controlled by management. Strategies worth considering include job (re)design, ensuring recovery experiences, and wellness programs.

(Re)designing Jobs *Redesigning jobs* to give employees more responsibility, more meaningful work, more autonomy, and increased feedback can reduce strain. Why? These factors give employees greater control over work activities, lessen their dependence on others, and demonstrate that the organization and its leadership care about employee well-being.[275] In redesigning jobs, managers should pay attention to the specific tasks that may serve as (or preclude) stressors.[276] For instance, one study of thousands of employees across multiple occupations demonstrated that jobs with irregular work schedules and conflictual contact were those most prone to bullying. Managers could provide supportive assistance to individuals in these jobs by designing some regularity in their schedules or alleviating the negative effects of the conflictual contact they experience.[277] Moreover, some jobs that are boring or repetitive can be straining and harmful to performance over time—enabling some variety in what employees do (or even making jobs more "playful" or "fun") can help solve these issues.[278]

One way to redesign jobs is to give employees control over the nature of their jobs (i.e., *job crafting*; see "Myth or Science?" in the chapter on motivation applications)[275] or to come to unique, *idiosyncratic deals* with each employee about their tasks, duties, and responsibilities.[280] This control and autonomy may be an additional necessary condition for mindfulness training to positively impact stress and health at work.[281] However, managers should be vigilant and ensure that employees are not accepting too many challenges that could lead to burnout.[282] Another way to redesign jobs would be to permit opportunities for employee training, development, and growth. Skill-enhancing job design practices influence job satisfaction, mental well-being, and the adoption of these skills to do their jobs more effectively.[283]

But as we noted in our discussion of work design, not all employees want enriched jobs. The right redesign for employees with a low need for growth might include less responsibility and increased specialization. If individuals prefer structure and routine, reducing skill variety should reduce uncertainties and stress levels. Moreover, the wrong type of job redesign decision can actually backfire and lead to more strain.[280] For instance, giving employees more responsibility for the outcomes of their work may cause proactive employees to burn out

while attempting to meet this "challenge."[285] Managers should closely examine the nature of any job design decisions and their effect on employees.[286]

Enabling a Remote Work Option As we noted earlier, the COVID-19 pandemic has led dozens of companies (e.g., Box, Shopify, Nationwide) to permanently go virtual (or partially; e.g., Twitter, Facebook, Hitachi).[287] Indeed, most employees indicated that they would prefer to work from home at least part of the time.[288] One study applied machine learning to compare 1.56 million tweets from before and after the onset of the pandemic, suggesting that public opinion of remote work increased substantially.[289]

Although we described the newest research and perspectives on flexible work in the chapter on motivation applications, we bring up remote work here to make a point: just like in-person work, telecommuting has its own unique set of demands and stressors. For example, many people have reported experiencing videoconference fatigue (e.g., "Zoom fatigue") and other setbacks during the pandemic.[290] Earlier in this chapter, we described how remote work can lead some toward heightened work–life integration and less segmentation, leading to more stress and burnout for some people. But if we are talking about whether the pros outweigh the cons, clearly, remote work has a more positive effect on work outcomes than some might think.[291] Maybe employees who struggle with remote work need to learn how to do so effectively? And maybe jobs can be redesigned and resources provided to employees so that their home and life stressors can be reduced or removed?

Regardless, some people do not have the resources or skills to work remotely right away or in an effective manner. To confront the perils of excessive work–life integration in remote work, organizations should be careful when deciding to structure work and organizations so that employees are on call twenty-four hours a day: workplace *telepressure* can impede the effectiveness of employee recovery experiences and increase stress.[288]

Offering Recovery Experiences All employees need an occasional escape from the frenetic pace of their work to *recover* from these experiences.[293] However, in some countries, people perhaps do not seem to value recovery experiences as much as they should. For instance, the average American only uses about 54 percent of their available time off every year, with only 28 percent of Americans using their full vacation days.[294] Of course, the pandemic has made travel an exercise in caution.[295] Still, many employees do not even take "staycations," despite their increasing popularity.[296]

Why do some employees not use their vacation days? After all, research on people looking back on the purchases that made them happy in their lives tend to cherish their *experiences* more than *things* they bought.[293] Researchers suggest several potential reasons. Apart from those who do not have the luxury of taking a vacation, many (1) feel like they cannot successfully detach (e.g., they will still have to "be on call" while away), (2) do not expect the vacation to result in positive outcomes (e.g., they will struggle relaxing or connecting with others), or (3) even expect negative outcomes (e.g., strain, negative financial impact) from taking a vacation.[298]

Are these concerns warranted? Some research on hundreds of teachers on mid-term vacations (e.g., fall or spring breaks) found perfectionist teachers tended to have trouble fully relaxing on vacation and continued to feel emotionally exhausted, mostly due to negative spillover and taking work on vacation with them. However, perfectionist teachers realized the full benefits of the vacation if they refrained from taking work with them (and just left those papers ungraded for their vacation).[299] Despite these occurrences, vacations reduce strain and result in heightened well-being. However, the effects tend to fade as the employee returns to work. Moreover, if the "back to work" workload is very high, it may be a jarring shock that leads the employee to return to pre-vacation stress levels.[300]

Although most companies offer vacation leave, many companies, including Charles Schwab, Adobe, Intel, Epic, PayPal, Deloitte, Autodesk, Biogen, and Genentech, have begun to provide extended, voluntary leaves.[301] These *sabbaticals*—ranging in length from a few weeks to several months—allow employees to travel, relax, or pursue personal projects that consume time beyond normal vacations. One study of university faculty members suggests that sabbaticals increase job resources and well-being, especially when they have greater autonomy in how they spend their sabbatical.[298] Moreover, employees from a small manufacturing company who took sabbaticals described that the sabbatical was a way for them to "find themselves" and "discover who they are," contributing to the construction of a positive self-identity.[303]

In general, the research suggests organizations should encourage employees to rest and recover. Also, they should encourage employees to set clear boundaries between work and life and ease the transitions surrounding vacation time and work time.

Wellness Programs Our final suggestion is organizationally supported employee assistance programs (EAPs), work–life programs, or **wellness programs**. (Note that many have argued that these programs should be integrated and considered under the same umbrella, although there are some differences.)[304] These are organizationally supported programs that focus on the employees' total physical and mental health.[305] They typically provide workshops to help people quit smoking, control alcohol use, lose weight, make healthier food and drink choices, and develop a regular exercise program.[306] Some programs help employees improve their psychological health as well. Most wellness programs attempt to equip employees with what they need to take responsibility for their physical and mental health. In essence, participation in a wellness program can replenish employee resources (consistent with COR theory), leading them to start a continuous, upward trajectory of improvement.[307]

wellness programs Organizationally supported programs that focus on the employees' total physical and mental condition.



Corporate wellness programs can help employees manage stress. As part of its wellness and fitness initiatives, the Buchanan Ingersoll & Rooney law firm (formerly Fowler White Boggs) brings in yoga instructors during employees' lunch hours to lead them in stretching and breathing exercises that help relieve stress and promote a sense of well-being.

Source: Lucky Business/Shutterstock

Do wellness programs work? A meta-analysis of thirty-six programs designed to reduce stress (including wellness programs) showed that interventions to help employees reframe stressful situations and use active coping strategies appreciably reduced stress levels.[308] Wellness programs that help employees focus on developing the "good" kind of stress and becoming challenged through their work have also been introduced.[309] Research suggests that these programs impact factors beyond stress relevant to OB, such as job satisfaction, absenteeism, and presenteeism.[310] However, research also suggests that wellness programs are only effective if people use them. Employees have to see the value in the wellness program, know their supervisor supports their participation, believe that their organization supports their continued wellness and is a safe place to seek help without stigma. If they do, they can leave the program with better performance, higher job satisfaction, and lower turnover intentions.[311]

Most firms that have introduced wellness programs have found significant benefits. Johnson & Johnson reported that its wellness program has saved the organization $250 million on health care costs in ten years, and research indicated that effective wellness programs significantly decreased turnover rates for most organizations.[312] Other research sponsored by the U.S. Department of Labor and Department of Health and Human Services indicated that organizational wellness programs create healthier employees with fewer health risk factors.[313] Moreover, the accumulated research suggests that organizations that implement wellness programs (1) observe a $5.93 to $1.00 savings-to-cost ratio, (2) reduce health costs by 26 percent, (3) reduce workers' compensation claims by 30 percent, and (4) observe a 28 percent reduction in sick days used.[314] However, as mentioned earlier, workers' benefits from these programs appear contingent on how much they put into the program, the extent to which they participate, and their attitudes upon entering the program.[315]

Summary

The issues of health and stress in organizations have presented themselves as a major public crisis worldwide. As employees work themselves to the core, without respite or concern for the consequences, millions of dollars are spent in costs, productivity is lost, and more importantly, employees risk serious injury, illness, and even death. In this chapter, we described the nature of stress in organizations. More specifically, the experience of stress results in the additive exposure to stressors, and this experience of stress results in strain (e.g., physiological, psychological, and behavioral consequences). Although stressors themselves can be seen as either positive (e.g., eustress, challenges) or negative (e.g., hindrances), the experience of strain can result from both types. Importantly, the experience of stress has important implications for both physical and mental health. OB researchers and practitioners have become increasingly concerned with physical health issues in the workplace, such as employee sleep, presenteeism, and the risk factors that cause illness and injury. Mental health is also a concern, with OB researchers and practitioners focusing on job insecurity as a stressor, workaholism in the modern workforce, and psychological distress issues at work (e.g., burnout and depression). After establishing this foundation, we put the pieces together and describe four primary theories governing our understanding of stress in organizations. Then we move toward describing one especially salient topic in organizations: the issue of work–life balance. We describe whether we are really confronting a "new normal" in the way we perceive work and life, the boundaries we establish between our various life domains, and the spillover and crossover (both positive and negative) that occur between

domains. Importantly, management plays a large role in facilitating employees' strategies for managing these boundaries and domains. We close the chapter by discussing both individual and organization-level approaches to stress management in organizations, along with best practices for managing stress.

Implications for Managers

- Both stress and health have substantial legal, financial, and effectiveness implications—managers would do well to have a stress and health management strategy.
- Resist the temptation to consider stress as uniformly a challenging, productive, "good" feeling.
- Encourage employees to proactively and constructively manage their health by getting enough good quality sleep and staying home and resting when they have contagious illnesses (or if their performance could be affected).
- Although job insecurity cannot be avoided, recognize its effect on employees as a stressor. Drastic cost-cutting measures like downsizing can reduce morale through its effect on job insecurity.
- To reduce burnout and other psychological distress, discourage workaholism and encourage employees to focus on their health and safety as major priorities.
- When addressing health issues in your organization, consider the effects that demands and resources have on the experience of strain and engagement, along with the factors that can help (e.g., control, support).
- Although no one knows how work–life balance will be treated in the future, it is clear that boundaries, segmentation, integration, spillover, and crossover have major implications in the workplace. The best thing managers can do would be to provide flexibility, enrichment (when desired), and boundary management support to employees as much as they can.
- Although there are several stress management approaches at organizational levels (e.g., job redesign and recovery provision), leaders and managers can play a role at all levels by establishing support systems, programs, and training that encourages employees to manage their stress levels through individual-level approaches.

Companies Should Encourage Stress Reduction

POINT

Companies make substantial investments in their employees, so the health and well-being of the workforce is a central concern. One of the most direct ways to provide assistance to employees is to engage in one of the stress-reduction interventions.

One major financial benefit of stress reduction programs is a reduction in health-related costs. Workplace stress leads to dozens of negative and expensive health-related consequences. Stress weakens the immune system, leading to increased illness and sick days. If employees feel extreme stress related to work, they may be more likely to come to work when they are contagious, leading to sickness for many others. Over the longer run, stress levels can also contribute to conditions like heart disease, which ultimately result in very expensive medical treatments. These medical treatments increase employer health insurance expenses.

Reductions in employee stress can facilitate job performance. Employees who are overburdened have difficulty concentrating, can lose energy and motivation at work, and find it difficult to think of new and creative ideas. Stress can also create conflicts with coworkers and lead to rude or hostile treatment of clients or customers. Ultimately, employees who are experiencing high levels of stress may leave, so all the costs of turnover are incurred.

Stress reduction programs also have an ethical component. The workplace generates a great deal of stress for many employees, so employers have a certain responsibility to offset its negative consequences. Stress reduction programs are a direct way to help employees feel better. When employers show concern for employees by helping reduce stress, employees feel more committed.

COUNTERPOINT

While employers may have a direct financial interest in certain elements of stress reduction, it is worth asking whether investing in stress reduction programs is actually a good idea.

The first problem is operational. Some stress reduction interventions are expensive, requiring professional facilitators or exercise equipment. These can take a long time to show financial returns, and the up-front costs of researching, designing, and implementing them are substantial. A growing number of corporations report that the expected returns on investment in wellness programs have failed to materialize. And the time employees spend in stress reduction interventions is time they spend not working.

Another problem is that stress reduction programs are invasive. Should your boss or other individuals in the workplace tell you how you are supposed to feel? Many stress reduction programs step even further into employees' personal lives by encouraging open discussions about sources of stress. Do you really want your manager and coworkers to know why you are experiencing stress? The more that sensitive topics related to stress are discussed, the harder it is to keep work relationships professional.

A final concern is that it is too hard to draw the line between stress from work and general life stress. A company's stress reduction program may try to target problems of work overload or social conflict, but these issues often affect other areas of life. How should a stress reduction program operate when the reasons for employee stress come, say, from a sick relative or conflicts with family members?

Organizations often mean well, but it may be more important to let employees keep their private lives private.[316]

CHAPTER REVIEW

QUESTIONS FOR REVIEW

18-1 How does the stress process unfold in the workplace?

18-2 How do sleep, illness, and injury affect physical health at work?

18-3 How do maladaptive mental health conditions manifest as a consequence of stressors at work?

18-4 What are the four major stress and health theories, and how are they different?

18-5 How is work–life conflict different from work–life enrichment?

18-6 What are the individual and organizational approaches to managing stress at work?

APPLICATION AND EMPLOYABILITY

In this chapter, you were introduced to the impact of stress and health in organizations. You learned about several techniques to manage your stress levels. Knowing how to manage your stress levels can help you become more employable because you will be equipped to manage your stress and health and perhaps perform better as a result. Also, challenging stressors and goals can help motivate you and lead to great accomplishments. If you find yourself managing people someday, you have learned various options for helping your employees manage their stress levels. In this chapter, you have improved your social responsibility skills, critical thinking, creativity, leadership, and career management skills by becoming aware of the dangers of a lack of sleep, learning how to talk about mental health without overstepping boundaries, considering how to help gig workers who are faced with job insecurity and other stressors, and debated whether companies should be involved in stress reduction efforts. In the next section, you will continue to build these skills by developing an awareness of micro-stressors in your life, considering the negative effects of presenteeism, and considering what to do when working for a company that offers health-friendly benefits (but with a culture that discourages their use).

EXPERIENTIAL EXERCISE Micro-Stressors

Many of us have days when we go home exhausted and end up having a restless night of sleep. While you may be able to identify what is causing your exhaustion, you may not realize that throughout the day, we often experience small amounts of stress, otherwise known as "micro-stressors," that can together hurt our health and productivity. Unfortunately, we often accept micro-stressors as just part of a typical day. Although we may not acknowledge them, they are still contributing to exhaustion and may ultimately lead to burnout. The sources of these micro-stressors are usually the people (both at and outside work) with whom we are closest. The first step in resolving these sources of stress is to identify them.

For this exercise, your task is to select two or three micro-stressors that consistently create the greatest amount of stress for you out of the twelve common micro-stressors shown in the chart on the following page. Then answer the questions that follow.

Questions

18-7. What can be done to alleviate the micro-stressors in your life?

18-8. What do you think organizations can do to mitigate the micro-stressors that commonly affect employees?

18-9. Did you find it helpful to use this chart to identify micro-stressors that impact your day-to-day life? Why or why not?[317]

ETHICAL DILEMMA The Fear of Redundancy and Ceasing Operations

Leading universities in the United Kingdom (including the University of Manchester and the University of Birmingham), renowned charter and low-cost airlines in Europe (such as Monarch, Air Berlin, and easyJet), colossal banks (such as the HSBC), iconic department stores (such as British Home Stores), and the Sheffield-based Outokumpu steel company—all have faced financial troubles and strains on their existence. As the companies

		Relationships				
Micro-Stressors		Boss	Other Leaders	Peers	Clients	Team
Limiting your abilities *Tension with individuals can create stress when it results in extra work or limits our ability to complete the tasks we already have.*	Lack of alignment in roles or priorities					
	Individual not delivering reliably					
	Unpredictable behavior from an individual who is in a position of authority					
	Increase in responsibilities at work or home					
	Weak communication norms					
Diminishing your emotional reserves *Stress can cause us harm when it results in negative feelings that drain our emotional reserves.*	Managing others and feeling responsible for their success or well-being					
	Lack of trust in your network					
	People who cause others to be stressed					
	Confrontational conversations					
Conflict with your identity or values *Interactions that consistently challenge your values or sense of self can result in emotional exhaustion.*	Pressure to pursue goals that do not align with your values					
	When someone's actions lower your self-confidence, self-worth, or self-control					
	Division in your network					

have struggled, so have the people who worked for them. This is because some of these companies have ceased operations and trading while others have announced massive redundancies in anticipation of economic struggle and uncertainty, political instability or industry decline, or even unexpected increases in operating costs, all of which have led to employee layoffs.

In the cases of easyJet, Manchester University, Birmingham University, and Outokumpu, thousands of employees were made redundant within a short period of time. Some of these were introduced as planned and incremental changes, but most of these changes were abrupt, drastic, and rather forced, causing a shock to the workforce staff. Situations like this constitute a stressful situation for both the management and the employees, as they can challenge trust relations and jeopardize individual and group performance as well as disrupt and confuse the group dynamics in many ways. Redundancy can also impede motivation for the staff remaining in their posts and generate stress for both those being made redundant as well as those who have to pick up after the former—not an easily accepted situation for those leaving or those remaining. In the new responsibilities and the workload, the remaining staff are also left worrying about their own future. In both cases, the stress created needs to be managed in the best possible manner. Support, mentoring, and consultations are vital for enhancing the skills and knowledge required in the new state of affairs as well as enhancing employee morale. Additionally, change needs to be planned and prepared to the extent possible, rather than carrying it out abruptly and at the expense of employees.[318]

Questions

18-10. Which were the main forces for change in the organizations presented above? How could these changes have been managed? How could the companies have resisted change?

18-11. Read the introduction to Appreciative Inquiry at appreciativeinquiry.champlain.edu. How could this model be applied in the case of a redundancy period to motivate and improve performance of the remaining staff?

18-12. What type of stressors could be created in a redundancy scenario, and where are these generated? Discuss how a company that is undergoing redundancy procedures can manage the stress generated for all affected parties.

CASE INCIDENT Burnout Despite Flexibility: Working Parents and COVID-19

In the months after the outbreak of the COVID-19 pandemic, it became apparent that the experiences of different categories of workers were very varied. One example is working parents who were forced to begin working from home. At the start of the pandemic, many governments around the world introduced lockdown policies to curb the spread of the virus such as mandatory work-from-home rules and closure of schools and child care facilities. Though it might feel like parents in office jobs should be considered lucky to be able to work from home, studies show that burnout was a huge issue for this category of employees.

While working parents always had to do some work–life juggling, the prolonged closure of child care facilities and schools and the loss of family support networks due to movement restrictions meant that the demand on working parents' time was unprecedented. In March 2020, around 1.4 billion children were out of school worldwide, and worrying reports of severe stress and anxiety among working parents began to emerge, then progressively increase. Homeschooling the children while trying to focus on a balance sheet, rocking a baby, keeping a toddler quiet during Zoom meetings, cooking extra meals, cleaning extra messes, working into the early hours to meet work deadlines—all of these, in addition to health risks and economic uncertainty, resulted in significantly higher stress. Parents reported feeling loss of control, emotional exhaustion, fatigue, and disengagement, which are all symptomatic of burnout. Mothers in particular were badly affected. UK statistics, for instance, show that they spent four more hours on child care and housework compared to fathers with the same work arrangements, a pattern shaped by the persistence of traditional gender roles. The situation was also exacerbated for those with lower incomes, limited living space, younger children, and children with special needs or additional health concerns. Research shows similar patterns of parental burnout in various European countries, the United States, Canada, Australia, as well as Asian and Middle Eastern countries, with studies conducted in India, Malaysia, Japan, and Iran.

Many organizations supported parents by allowing greater flexibility of work hours and by letting parents fit their work around child care. However, flexibility often meant working late and untimely hours, resulting in physical fatigue and exhaustion. One mother said that after her children were in bed at 9.30 p.m., she would be at work on her laptop, finishing everything she couldn't during the day, closing up at about 2 a.m. Many companies also tried to go the extra mile by offering various online wellness programs, well-being training, mindfulness and resilience sessions, online yoga, and so on. Though helpful for some categories of employees, few parents report as having taken advantage of these; as work intensity and target pressures often remained the same, this was not the best solution.

Research shows that flexible work and homeworking generally increases employee productivity and satisfaction and should by all means be part of the organizational commitment to employee well-being and work–life balance. However, in the circumstances of the pandemic, flexibility of working time alone was not enough, and rethinking what may work during a crisis is crucial. Recent research also suggests that, after several years of physical disconnect from the workplace and colleagues during the pandemic, framing wellness interventions around individuals and self-care may not be as effective. Instead, focusing programs on getting team members to take care of each other and working through struggles together may be a more effective solution. This may be beneficial across many categories of workers, and for working parents in particular, because understanding and working through team members' circumstances may increase knowledge-sharing, empathy, and team resilience (the ability and capacity of teams to respond to and cope with disruption and change in an effective and flexible manner). These kinds of approaches to well-being may remain relevant in the long term, as many international companies, such as Google and Spotify, are either contemplating or have already switched to a blend of remote and hybrid working for the foreseeable future.[319]

Questions

18-13. What types of stressors did working parents face during the COVID-19 pandemic?

18-14. Explain why working parents were more prone to increased burnout during the pandemic. Use the theories you learned in the chapter to support your answer.

18-15. Why were wellness initiatives like online yoga or resilience training and increased flexibility of work hours only marginally effective in reducing parental burnout? What else do you think organizations could have done to reduce parental burnout during crises?

Appendix Research in Organizational Behavior

A number of years ago, a friend of mine was excited because he had read about the findings from a research study that finally, once and for all, resolved the question of what it takes to make it to the top in a large corporation. I doubted there was any simple answer to this question, but not wanting to dampen his enthusiasm, I asked him to tell me about what he had read. The answer, according to my friend, was *participation in college athletics.* To say I was skeptical of his claim is a gross understatement, so I asked him to tell me more.

The study encompassed 1,700 successful senior executives at the 500 largest U.S. corporations. The researchers found that half of these executives had played varsity-level college sports.[1] My friend, who happens to be good with statistics, informed me that since fewer than 2 percent of all college students participate in intercollegiate athletics, the probability of this finding occurring by mere chance is less than 1 in 10 million! He concluded his analysis by telling me that, based on this research, I should encourage my management students to get into shape and to make one of the varsity teams.

My friend was somewhat perturbed when I suggested that his conclusions were likely to be flawed. These executives were all men who attended college in the 1940s and 1950s. Would his advice be meaningful to students in the twenty-first century? These executives also were not your typical college students. For the most part, they had attended elite private colleges such as Princeton and Amherst, where a large proportion of the student body participates in intercollegiate sports. And these CEOs had not necessarily played football or basketball; many had participated in golf, tennis, baseball, cross-country running, crew, rugby, and similar so-called minor sports. Moreover, maybe the researchers had confused the direction of causality. That is, maybe individuals with the motivation and ability to make it to the top of a large corporation are drawn to competitive activities like college athletics.

My friend was guilty of misusing research data. Of course, he is not alone. We are all continually bombarded with reports of experiments that link certain substances to cancer in mice and surveys that show changing attitudes toward sex among college students, for example. Many of these studies are carefully designed, with great caution taken to note the implications and limitations of the findings. But some studies are poorly designed, making their conclusions at best suspect, and at worst meaningless.

Rather than attempting to make you a researcher, the purpose of this appendix is to increase your awareness as a consumer of behavioral research. A knowledge of research methods will allow you to appreciate more fully the care in data collection that underlies the information and conclusions presented in this text. Moreover, an understanding of research methods will make you a more skilled evaluator of the OB studies you will encounter in business and professional journals. So, an appreciation of behavioral research is important because (1) it is the foundation on which the theories in this text are built, and (2) it will benefit you in future years when you read reports of research and attempt to assess their value.

Purposes of Research

Research is concerned with the systematic gathering of information. Its purpose is to help us in our search for the truth. Although we will never find ultimate truth—in our case, that would be to know precisely how any person or group would behave in any organizational context—ongoing research adds to our body of OB knowledge by supporting some theories, contradicting others, and suggesting new theories to replace those that fail to gain support.

Research Terminology

Researchers have their own vocabulary for communicating among themselves and with outsiders. The following briefly defines some of the more popular terms you are likely to encounter in behavioral science studies.[2]

Variable

A *variable* is any general characteristic that can be measured and that changes in amplitude, intensity, or both. Some examples of OB variables found in this textbook are job satisfaction, employee productivity, work stress, ability, personality, and group norms.

Hypothesis

A tentative explanation of the relationship between two or more variables is called a *hypothesis.* My friend's statement that participation in college athletics leads to a top executive position in a large corporation is an example

of a hypothesis. Until confirmed by empirical research, a hypothesis remains only a tentative explanation.

Dependent Variable

A *dependent variable* is a response that is affected by an independent variable. In terms of the hypothesis, it is the variable that the researcher is interested in explaining. Referring back to our opening example, the dependent variable in my friend's hypothesis was executive succession. In organizational behavior research, the most popular dependent variables are productivity, absenteeism, turnover, job satisfaction, and organizational commitment.[3]

Independent Variable

An *independent variable* is the presumed cause of some change in the dependent variable. Participating in varsity athletics was the independent variable in my friend's hypothesis. Popular independent variables studied by OB researchers include intelligence, personality, job satisfaction, experience, motivation, reinforcement patterns, leadership style, reward allocations, selection methods, and organization design.

You may have noticed that we said that job satisfaction is frequently used by OB researchers as both a dependent and an independent variable. This is not an error. It merely reflects that the label given to a variable depends on its place in the hypothesis. In the statement "Increases in job satisfaction lead to reduced turnover," job satisfaction is an independent variable. However, in the statement "Increases in money lead to higher job satisfaction," job satisfaction becomes a dependent variable.

Moderating Variable

A *moderating variable* abates the effect of the independent variable on the dependent variable. It might also be thought of as the contingency variable: If X (independent variable), then Y (dependent variable) will occur, but only under conditions Z (moderating variable). To translate this into a real-life example, we might say that if we increase the amount of direct supervision in the work area (X), then there will be a change in worker productivity (Y), but this effect will be moderated by the complexity of the tasks being performed (Z).

Causality

A hypothesis, by definition, implies a relationship. That is, it implies a presumed cause and effect. This direction of cause and effect is called *causality*. Changes in the independent variable are assumed to cause changes in the dependent variable. In behavioral research, however, it is possible to make an incorrect assumption of causality when relationships are found. For example, early behavioral scientists found a relationship between employee satisfaction and productivity. They concluded that a happy worker was a productive worker. Follow-up research has supported the relationship, but disconfirmed that high productivity leads to satisfaction rather than the other way around.

Correlation Coefficient

It is one thing to know that there is a relationship between two or more variables. It is another to know the *strength* of that relationship. The term *correlation coefficient* is used to indicate that strength, and it is expressed as a number between –1.00 (a perfect negative relationship) and +1.00 (a perfect positive correlation).

When two variables vary directly with one another, the correlation will be expressed as a positive number. When they vary inversely—that is, one increases as the other decreases—the correlation will be expressed as a negative number. If the two variables vary independently of each other, we say that the correlation between them is zero.

For example, a researcher might survey a group of employees to determine the satisfaction of each with their job. Then, using company absenteeism reports, the researcher could correlate the job satisfaction scores against individual attendance records to determine whether employees who are more satisfied with their jobs have better attendance records than their counterparts who indicated lower job satisfaction. Let us suppose the researcher found a correlation coefficient of +0.50 between satisfaction and attendance. Would that be a strong association? There is, unfortunately, no precise numerical cutoff separating strong and weak relationships. A standard statistical test would need to be applied to determine whether the relationship was a significant one.

A final point needs to be made before we move on: A correlation coefficient measures only the strength of association between two variables. A high value does *not* imply causality. The number of computer science doctorates and total revenue generated by arcades, for instance, have been highly correlated over the decades, but one should be careful not to infer that a causal relationship between the two exists. In this instance, the high correlation is more happenstance than predictive.

Theory

The final term we introduce in this section is *theory*. Theory describes a set of systematically interrelated concepts or hypotheses that purports to explain and predict phenomena. In OB, theories are also frequently referred to as *models*. We use the two terms interchangeably.

There are no shortages of theories in OB. For instance, we have theories to describe what motivates people, the most effective leadership styles, the best way to resolve conflicts, and how people acquire power. In some cases, we have half a dozen or more separate theories that purport to explain and predict a given phenomenon. In such cases, is one right and the others wrong? No! They tend to reflect science at work—researchers testing previous theories; modifying them; and, when appropriate, proposing new models that may prove to have higher explanatory and predictive powers. Multiple theories attempting to explain common phenomena merely attest to the fact that OB is an active discipline, still growing and evolving.

Evaluating Research

As a potential consumer of behavioral research, you should follow the dictum of *caveat emptor*—let the buyer beware! In evaluating any research study, you need to ask three questions.[4]

Is it valid? Is the study actually measuring what it claims to be measuring? A number of psychological tests have been discarded by employers in recent years because they have not been found to be valid measures of the applicants' ability to do a given job successfully. But the validity issue is relevant to all research studies. So, if you find a study that links cohesive work teams with higher productivity, you want to know how each of these variables was measured and whether it is actually measuring what it is supposed to be measuring.

Is it reliable? Reliability refers to consistency of measurement. If you were to have your height measured every day with a wooden yardstick, you would get highly reliable results. On the other hand, if you were measured each day by an elastic tape measure, there would probably be considerable disparity between your height measurements from one day to the next. Your height, of course, does not change from day to day. The variability is due to the unreliability of the measuring device. So, if a company asked a group of its employees to complete a reliable job satisfaction questionnaire and then repeat the questionnaire six months later, we would expect the results to be very similar—provided nothing changed in the interim that might significantly affect employee satisfaction.

Is it generalizable? Are the results of the research study generalizable to groups of individuals other than those who participated in the original study? Be aware, for example, of the limitations that might exist in research that uses college students as subjects. Are the findings in such studies generalizable to full-time employees in real jobs? Similarly, how generalizable to the overall work population are the results from a study that assesses job stress among ten nuclear power plant engineers in the hamlet of Mahone Bay, Nova Scotia?

Research Design

Doing research is an exercise in trade-offs. Richness of information typically comes with reduced generalizability. The more a researcher seeks to control for confounding variables, the less realistic their results are likely to be. High precision, generalizability, and control almost always translate into higher costs. When researchers make choices about whom they will study, where their research will be done, the methods they will use to collect data, and so on, they must make some concessions. Good research designs are not perfect, but they do carefully reflect the questions being addressed. Keep these facts in mind as we review the strengths and weaknesses of five popular research designs: case studies, field surveys, laboratory experiments, field experiments, and aggregate quantitative reviews.

Case Study

You pick up a copy of Soichiro Honda's autobiography. In it he describes his impoverished childhood; his decisions to open a small garage, assemble motorcycles, and eventually build automobiles; and how this led to the creation of one of the largest and most successful corporations in the world. Or you are in a business class and the instructor distributes a 50-page handout covering two companies: Walmart and Target. The handout details the two firms' histories; describes their corporate strategies, management philosophies, and merchandising plans; and includes copies of their recent balance sheets and income statements. The instructor asks the class members to read the handout, analyze the data, and determine why Walmart has been more successful than Target in recent years.

Soichiro Honda's autobiography and the Walmart and Target handouts are case studies. Drawn from real-life situations, case studies present an in-depth analysis of one setting. They are thorough descriptions, rich in details about an individual, a group, or an organization. The primary source of information in case studies is obtained through observation, occasionally backed up by interviews and a review of records and documents.

Case studies have their drawbacks. They are open to the perceptual bias and subjective interpretations of the observer. The reader of a case is captive to what the observer/case writer chooses to include and exclude. Cases also trade off generalizability for depth of information and richness of detail. Because it is always dangerous to generalize from a sample of one, case studies make it difficult to prove or reject a hypothesis. On the other hand, you cannot ignore the in-depth analysis that cases often provide. They are an excellent device for initial exploratory research and for evaluating real-life problems in organizations.

Field Survey

A lengthy questionnaire was created to assess the use of ethics policies, formal ethics structures, formalized activities such as ethics training, and executive involvement in ethics programs among billion-dollar corporations. The public affairs or corporate communications office of all Fortune 500 industrial firms and 500 service corporations were contacted to get the name and address of the "officer most responsible for dealing with ethics and conduct issues" in each firm. The questionnaire, with a cover letter explaining the nature of the study, was mailed to these 1,000 officers. Of the total, 254 returned a completed questionnaire, for a response rate just above 25 percent. The results of the survey found, among other things, that 77 percent had formal codes of ethics and 54 percent had a single officer specifically assigned to deal with ethics and conduct issues.[5]

The preceding study illustrates a typical field survey. A sample of respondents (in this case, 1,000 corporate officers in the largest U.S. publicly held corporations) was selected to represent a larger group that was under examination (billion-dollar U.S. business firms). The

respondents were then surveyed using a questionnaire or interviewed to collect data on specific characteristics (the content and structure of ethics programs and practices) of interest to the researchers. The standardization of response items allows for data to be easily quantified, analyzed, and summarized, and for the researchers to make inferences from the representative sample about the larger population.

The field survey provides economies for doing research. It is less costly to sample a population than to obtain data from every member of that population. (There are, for instance, hundreds to thousands of U.S. firms with revenues in excess of a billion dollars; some of these are privately held and do not release financial data to the public, and they are excluded from the *Fortune* list.) Moreover, as the ethics study illustrates, field surveys provide an efficient way to find out how people feel about issues or how they say they behave. These data can then be easily quantified.

But the field survey has a number of potential weaknesses. First, mailed questionnaires rarely obtain 100 percent returns. Low response rates call into question whether conclusions based on respondents' answers are generalizable to nonrespondents. Second, the format is better at tapping respondents' attitudes and perceptions than behaviors. Third, responses can suffer from social desirability, that is, people saying what they think the researcher wants to hear. Fourth, because field surveys are designed to focus on specific issues, they are a relatively poor means of acquiring depth of information. Finally, the quality of the generalizations is largely a factor of the population chosen. Responses from executives at Fortune 500 firms, for instance, tell us nothing about small- or medium-sized firms or nonprofit organizations. In summary, even a well-designed field survey trades off depth of information for breadth, generalizability, and economic efficiencies.

Laboratory Experiment

The following study is a classic example of the laboratory experiment. A researcher, Stanley Milgram, wondered how far individuals would go in following commands. If subjects were placed in the role of a teacher in a learning experiment and told by an experimenter to administer a shock to a learner each time that learner made a mistake, would the subjects follow the commands of the experimenter? Would their willingness to comply decrease as the intensity of the shock was increased?

To test these hypotheses, Milgram hired a set of subjects. Each was led to believe that the experiment was to investigate the effect of punishment on memory. Their job was to act as teachers and administer punishment whenever the learner made a mistake on the learning test.

Punishment was administered by an electric shock. The subject sat in front of a shock generator with 30 levels of shock—beginning at zero and progressing in 15-volt increments to a high of 450 volts. The demarcations of these positions ranged from "Slight Shock" at 15 volts to "Danger: Severe Shock" at 450 volts. To increase the realism of the experiment, the subjects received a sample shock of 45 volts and saw the learner—a pleasant, mild-mannered man about 50 years old—strapped into an "electric chair" in an adjacent room. Of course, the learner was an actor, and the electric shocks were phony, but the subjects did not know this.

Taking his seat in front of the shock generator, the subject was directed to begin at the lowest shock level and to increase the shock intensity to the next level each time the learner made a mistake or failed to respond.

When the test began, the shock intensity rose rapidly because the learner made many errors. The subject got verbal feedback from the learner: At 75 volts, the learner began to grunt and moan; at 150 volts, he demanded to be released from the experiment; at 180 volts, he cried out that he could no longer stand the pain; and at 300 volts, he insisted that he be let out, yelled about his heart condition, screamed, and then failed to respond to further questions.

Most subjects protested and, fearful they might kill the learner if the increased shocks were to bring on a heart attack, insisted they could not go on with their job. Hesitations or protests by the subject were met by the experimenter's statement, "You have no choice; you must go on! Your job is to punish the learner's mistakes." Of course, the subjects did have a choice. All they had to do was stand up and walk out.

The majority of the subjects dissented. But dissension is not synonymous with disobedience. Sixty-two percent of the subjects increased the shock level to the maximum of 450 volts. The average level of shock administered by the remaining 38 percent was nearly 370 volts.[6]

In a laboratory experiment such as that conducted by Milgram, an artificial environment is created by the researcher. Then the researcher manipulates an independent variable under controlled conditions. Finally, because all other things are held equal, the researcher is able to conclude that any change in the dependent variable is due to the manipulation or change imposed on the independent variable. Note that, because of the controlled conditions, the researcher is able to imply causation between the independent and dependent variables.

The laboratory experiment trades off realism and generalizability for precision and control. It provides a high degree of control over variables and precise measurement of those variables. But findings from laboratory studies are often difficult to generalize to the real world of work. This is because the artificial laboratory rarely duplicates the intricacies and nuances of real organizations. In addition, many laboratory experiments deal with phenomena that cannot be reproduced or applied to real-life situations.

Field Experiment

The following is an example of a field experiment. The management of a large company is interested in determining the impact that a four-day workweek would have on employee absenteeism. To be more specific, management wants to know if employees working four

ten-hour days have lower absence rates than similar employees working the traditional five-day week of eight hours each day. Because the company is large, it has a number of manufacturing plants that employ essentially similar workforces. Two of these are chosen for the experiment, both located in the greater Cleveland area. Obviously, it would not be appropriate to compare two similar-sized plants if one is in rural Mississippi and the other is in urban Copenhagen because factors such as national culture, transportation, and weather might be more likely to explain any differences found than changes in the number of days worked per week.

In one plant, the experiment was put into place—workers began the four-day week. At the other plant, which became the control group, no changes were made in the employees' five-day week. Absence data were gathered from the company's records at both locations for a period of eighteen months. This extended time period lessened the possibility that any results would be distorted by the mere novelty of changes being implemented in the experimental plant. After eighteen months, management found that absenteeism had dropped by 40 percent at the experimental plant, and by only 6 percent in the control plant. Because of the design of this study, management believed that the larger drop in absences at the experimental plant was due to the introduction of the compressed workweek.

The field experiment is similar to the laboratory experiment except it is conducted in a real organization. The natural setting is more realistic than the laboratory setting, and this enhances validity but hinders control. In addition, unless control groups are maintained, there can be a loss of control if extraneous forces intervene—for example, an employee strike, a major layoff, or a corporate restructuring. Maybe the greatest concern with field studies has to do with organizational selection bias. Not all organizations are going to allow outside researchers to come in and study their employees and operations. This is especially true of organizations that have serious problems. Therefore, because most published studies in OB are done by outside researchers, the selection bias might work toward the publication of studies conducted almost exclusively at successful and well-managed organizations.

Our general conclusion is that, of the four research designs we have discussed to this point, the field experiment typically provides the most valid and generalizable findings and, except for its high cost, trades off the least to get the most.[7]

Aggregate Quantitative Reviews

What is the overall effect of organizational behavior modification (OB Mod) on task performance? There have been a number of field experiments that have sought to throw light on this question. Unfortunately, the wide range of effects from these various studies makes it hard to generalize.

To try to reconcile these diverse findings, two researchers reviewed all the empirical studies they could find on the impact of OB Mod on task performance over a twenty-year period.[8] After discarding reports that had inadequate information, had nonquantitative data, or did not meet all conditions associated with principles of behavioral modification, the researchers narrowed their set to 19 studies that included data on 2,818 individuals. Using an aggregating technique called *meta-analysis*, the researchers were able to synthesize the studies quantitatively and to conclude that the average person's task performance will rise from the 50th percentile to the 67th percentile after an OB Mod intervention.

The OB Mod–task performance review done by these researchers illustrates the use of meta-analysis, a quantitative form of literature review that enables researchers to look at validity findings from a comprehensive set of individual studies and then to apply a formula to them to determine if they consistently produced similar results.[9] If results prove to be consistent, it allows researchers to conclude more confidently that validity is generalizable. Meta-analysis is a means for overcoming the potentially imprecise interpretations of qualitative reviews and to synthesize variations in quantitative studies. In addition, the technique enables researchers to identify potential moderating variables between an independent and a dependent variable.

In the past 25 years, there has been a surge in the popularity of this research method. Why? It appears to offer a more objective means for doing traditional literature reviews. Although the use of meta-analysis requires researchers to make a number of judgment calls, which can introduce a considerable amount of subjectivity into the process, there is no denying that meta-analysis reviews have now become widespread in the OB literature.

Ethics in Research

Researchers are not always tactful or candid with subjects when they do their studies. For instance, questions in field surveys may be perceived as embarrassing by respondents or as an invasion of privacy. Also, researchers in laboratory studies have been known to deceive participants about the true purpose of their experiment "because they felt deception was necessary to get honest responses."[10]

The "learning experiments" conducted by Stanley Milgram, which were conducted more than thirty years ago, have been widely criticized by psychologists on ethical grounds. He lied to subjects, telling them his study was investigating learning, when, in fact, he was concerned with obedience. The shock machine he used was a fake. Even the "learner" was an accomplice of Milgram's who had been trained to act as if he were hurt and in pain. Yet ethical lapses continue. For instance, in 2001, a professor of organizational behavior at Columbia University sent out a common letter on university letterhead to 240 New York City restaurants in which he detailed how he had eaten at this restaurant with his wife in celebration of their wedding anniversary, how he had gotten food poisoning, and that he had spent

the night in his bathroom throwing up.[11] The letter closed with: "Although it is not my intention to file any reports with the Better Business Bureau or the Department of Health, I want you to understand what I went through in anticipation that you will respond accordingly. I await your response." The fictitious letter was part of the professor's study to determine how restaurants responded to complaints. But it created culinary chaos among many of the restaurant owners, managers, and chefs as they reviewed menus and produce deliveries for possibly spoiled food and questioned kitchen workers about possible lapses. A follow-up letter of apology from the university for "an egregious error in judgment by a junior faculty member" did little to offset the distress it created for those affected.

Professional associations like the American Psychological Association, the American Sociological Association, and the Academy of Management have published formal guidelines for the conduct of research. Yet the ethical debate continues. On one side are those who argue that strict ethical controls can damage the scientific validity of an experiment and cripple future research. Deception, for example, is often necessary to avoid contaminating results. Moreover, proponents of minimizing ethical controls note that few subjects have been appreciably harmed by deceptive experiments. Even in Milgram's highly manipulative experiment, only 1.3 percent of the subjects reported negative feelings about their experience. The other side of this debate focuses on the rights of participants. Those favoring strict ethical controls argue that no procedure should ever be emotionally or physically distressing to subjects, and that, as professionals, researchers are obliged to be completely honest with their subjects and to protect the subjects' privacy at all costs.

Summary

The subject of organizational behavior is composed of a large number of theories that are research based. Research studies, when cumulatively integrated, become theories, and theories are proposed and followed by research studies designed to validate them. The concepts that make up OB, therefore, are only as valid as the research that supports them.

The topics and issues in this book are for the most part research-derived. They represent the result of systematic information gathering rather than merely hunch, intuition, or opinion. This does not mean, of course, that we have all the answers to OB issues. Many require far more corroborating evidence. The generalizability of others is limited by the research methods used. But new information is being created and published at an accelerated rate. To keep up with the latest findings, we strongly encourage you to review regularly the latest research in organizational behavior. More academic work can be found in journals such as the *Academy of Management Journal, Academy of Management Review, Administrative Science Quarterly, Human Relations, Journal of Applied Psychology, Journal of Management, Journal of Organizational Behavior*, and *Leadership Quarterly*. For more practical interpretations of OB research findings, you may want to read the *California Management Review, Harvard Business Review, Organizational Dynamics*, and the *Sloan Management Review*.

Comprehensive Cases

CASE 1

Managing Motivation in a Difficult Economy

Learning Goals

In this case, you will have an opportunity to assess a motivational program designed to reenergize a troubled company's workforce. Acting on behalf of the company's executive board, you will evaluate the board's current strategy based on survey data. You will also advise board members about improving the effectiveness of this program based on what you have learned about goal setting and motivation in organizations.

Major Topic Areas

- Changing nature of work
- Diversity and age
- Goal setting
- Organizational downsizing
- Organizational justice

The Scenario

Morgan-Moe's drugstores are in trouble. As a major regional player in the retail industry, the company has hundreds of stores in the upper Midwest. Unfortunately, a sharp decline in the region's manufacturing economy has put management in a serious financial bind. Revenues have been consistently dwindling. Customers spend less, and the stores have had to switch their focus to very low-margin commodities, such as milk and generic drugs, rather than the high-margin impulse-buy items that used to be the company's bread and butter. The firm has closed several locations, reversing its expansion plans for the first time since it was incorporated.

Because this is uncharted territory for the company, Jim Claussen, vice president for human relations, struggled with how to address the issue with employees. As the company's fortune declined, he could see that employees were becoming more and more disaffected. Their job insecurity was taking a toll on their job attitudes. The company's downsizing was big news, and the employees did not like what they were hearing.

Media reports of Morgan-Moe's store closings have focused on the lack of advance notice or communication from the company's corporate offices, as well as the lack of severance payments for departing employees. In the absence of official information, rumors and gossip have spread like wildfire among the remaining employees. A few angry blogs developed by laid-off employees, like IHateMorganMoe.com, have made the morale and public relations picture even worse.

Morgan-Moe is changing in other ways as well. The average age of its workforce is increasing rapidly. A couple of factors have contributed to this shift. First, fewer qualified young people live in the area because many families have moved away to find jobs. Second, stores have been actively encouraged to hire older workers, such as retirees looking for supplemental income. Managers are very receptive to these older workers because they are more mature, miss fewer days of work, and do not have child care responsibilities. They are also often more qualified than younger workers because they have more experience, sometimes in the managerial or executive ranks.

These older workers have been a great asset to the company in troubled times, but they are especially likely to leave if things get bad. Suppose these older workers start to leave the company, taking their hard-earned experience with them. In that case, it seems likely that Morgan-Moe will sink deeper toward bankruptcy.

The System

Claussen was not sure how to respond to employees' sense of hopelessness and fear until a friend gave him a book titled *Man's Search for Meaning*. The book was written by a psychologist named Victor Frankl, who survived the concentration camps at Auschwitz. Frankl found that those who had a clear sense of purpose, a

reason to live, were more likely to persevere in the face of nearly unspeakable suffering. Something about this book, and its advocacy of finding meaning and direction as a way to triumph over adversity, really stuck with Claussen. He thought he might be able to apply its lessons to his workforce. He proposed a new direction for management to the company's executive committee, and they reluctantly agreed to try his suggestions.

Over the past six months, stores throughout the company have used a performance management system that, as Claussen says, "gets people to buy into the idea of performing so that they can see some real results in their stores. It is all about seeing that your work serves a broader purpose. I read about how some companies have been sharing store performance information with employees to get them to understand what their jobs really mean and participate in making changes. I thought that was something we would be able to do."

The human resources (HR) team came up with five options for the management system. Corporate allowed individual managers to choose the option they thought would work best with their employees so that managers would not feel too much like a rapid change was being forced on them. Program I is opting out of the new idea, continuing to stay the course, and providing employees with little to no information or opportunities for participation. Program II tracks employee absence and sick leave data and shares that information with individual employees, giving them feedback about things they can control. Management takes no further action. Program III tracks sales and inventory replacement rates across shifts. As in Program II, information is shared with employees, but without providing employee feedback about absence and sick leave data. Program IV, the most comprehensive, tracks the same information as Programs II and III. Managers communicate it in weekly brainstorming sessions, during which employees try to determine what they can do better in the future and make suggestions for improving store performance. Program V keeps the idea of brainstorming but does not provide employees with information about their behavior or company profits.

Since implementing the system, Claussen has spoken with several managers about what motivated them to choose the program they did. Artie Washington, who chose Program IV, said, "I want to have my employees' input on how to keep the store running smoothly. Everybody worries about their job security in this economy. Letting them know what is going on and giving them ways to change things keeps them involved."

Betty Alvarez could not disagree more. She selected Program I. "I would rather have my employees doing their jobs than going to meetings to talk about doing their jobs. That is what management is for." Michael Ostremski, another proponent of Program I, added, "It is okay for the employees to feel a little uncertain—if they think we are in the clear, they will slack off. If they think we are in trouble, they will give up."

Cal Martins also questions the need to provide information to the whole team, but he chose Program II. "A person should know where they stand in the job, but they do not have to know about everyone else. It creates unnecessary tension."

This is somewhat similar to Cindy Ang's reason for picking Program V. "When we have our brainstorming meetings, I learn what they [the employees] think is most pressing, not what some spreadsheet says. It gives me a better feel for what is going on in my store. Numbers count, of course, but they do not tell you everything. I was also a little worried that employees would be upset if they saw that we are not performing well."

Results to Date

Claussen is convinced that the most elaborate procedure (Program IV) is the most effective. Still, not everyone in the executive committee is won over by his advocacy. Although they have supported the test implementation of the system because it appears to have relatively low costs, others on the committee want to see results. CEO Jean Masterson has asked for a complete breakdown of the performance of the various stores over the past four years. She is especially interested in seeing how sales figures and turnover rates have been affected by the new program.

The company has been collecting data in spreadsheets on sales and turnover rates. It prepared the following report, which also estimates the dollar cost of staff time taken up in each method. These costs are based on the number of hours employees spend working on the program multiplied by their wage rate. Estimates of turnover, profit, and staff time are collected per store. Profit and turnover data include means and standard deviations across locations; profit is net of the monthly time cost. Turnover information refers to the percentage of employees who either quit or are terminated in a month.

To see if any patterns emerged in managers' selection of programs, the company calculated relationships between program selection and various attributes of the stores. Program I was selected most frequently by the oldest stores and those in the most economically distressed areas. Programs II and III were selected most frequently by stores in urban areas and in areas where the workforce was younger on average. Programs IV and V were selected most frequently in rural areas, especially where the workforce is older on average.

Program	Methods	Number of Stores	Average Turnover	Weekly Profit per Month	Monthly Staff Time Cost
Program I	Traditional management	83	Mean = 30% SD = 10%	Mean = $5,700 SD = $3,000	None
Program II	Share absence and sick leave	27	Mean = 23% SD = 14%	Mean = $7,000 SD = $5,800	$1,960
Program III	Share sales and inventory	35	Mean = 37% SD = 20%	Mean = $11,000 SD = $2,700	$2,440
Program IV	Share information and brainstorm	67	Mean = 17% SD = 20%	Mean = $13,000 SD = $3,400	$3,420
Program V	Brainstorm without sharing information	87	Mean = 21% SD = 12%	Mean = $14,000 SD = $2,400	$2,750

Your Assignment

Your task is to prepare a report for the company's executive committee on the effectiveness of these programs. Make certain it is in the form of a professional business document. Your audience will not necessarily know about the organizational principles you are describing, so make sure you provide detailed explanations that someone in a real business can understand.

When you write, make sure you touch on the following points:

CC-1. Consider the five management systems as variables in an experiment. Identify the independent and dependent variables and explain how they are related to one another.

CC-2. Based on the discussion of independent and dependent variables in the text, is there anything else you would like to measure as an outcome?

CC-3. Look over the data and decide which method of management appears most effective in generating revenues and reducing turnover, and why. Which methods appear least effective, and why?

CC-4. Are there any concerns you have about these data?

CC-5. Does a comparison of the number of stores using each method influence your conclusions at all?

CC-6. Does the fact that managers are selecting the specific program to use (including Program I, which continues the status quo) affect the inferences you can draw about program success?

CC-7. What are the advantages of randomly assigning different conditions to the stores instead of using this self-selection process?

CC-8. How do the changing nature of the workforce and the economy, described in your text and in the case, affect your conclusions about managing retail employees? Does the participation of a more experienced workforce help or hurt these programs? Why might these programs work differently in an economy that is not doing so poorly?

CC-9. Claussen essentially designed the program on his own, with very little research into goal setting and motivation. Based on your text, how well has he done? Which parts of the program appear to fit well with research evidence on goal setting? What parts would you change to get more substantial improvements in employee motivation?

CC-10. Describe the feelings that employees might have when these systems are implemented to help or hinder the program's success. What advice would you give managers about implementing the programs, so they match the principles of organizational justice described in your text?

CASE 2

Repairing Jobs That Fail to Satisfy

Learning Goals

Companies often divide work as a way to improve efficiency, but specialization can lead to negative consequences. DrainFlow is a company that has effectively used specialization to reduce costs relative to its competitors' costs for years. Still, rising customer complaints suggest the firm's strong position may be slipping. After reading the case, you will suggest some ways it can create more interesting work for employees. You will also tackle the problem of finding people qualified and ready to perform the multiple responsibilities required in these jobs.

Major Topic Areas

- Job design
- Job satisfaction
- Personality
- Emotional labor

The Scenario

DrainFlow is a large residential and commercial plumbing maintenance firm that operates around the United States. It has been a major player in residential plumbing for decades. Its familiar rhyming motto, "When Your Drain Will Not Go, Call DrainFlow," has been plastered on billboards since the 1960s.

Lee Reynaldo has been a regional manager at DrainFlow for about two years. She used to work for a newer competing chain, Lightning Plumber, which has been drawing more and more customers from DrainFlow. Although her job at DrainFlow pays more, Reynaldo is not happy with the way things are going. She noticed that the work environment is not as vital or energetic as the environment she saw at Lightning.

Reynaldo thinks that employees are not motivated to provide the type of customer service Lightning Plumber employees offer. She recently sent surveys to customers to collect performance information, and the data confirmed her fears. Although 60 percent of respondents said they were satisfied with their experience and would use DrainFlow again, 40 percent felt their experience was not good, and 30 percent said they would use a competitor the next time they had a plumbing problem.

Reynaldo is wondering whether DrainFlow's job design might be contributing to its problems in retaining customers. DrainFlow has about 2,000 employees in four basic job categories: plumbers, plumber's assistants, order processors, and billing representatives. This structure is designed to keep costs as low as possible. Plumbers make very high wages, whereas plumber's assistants make about one-quarter of what a licensed plumber makes. Therefore, using plumber's assistants is a very cost-effective strategy that has enabled DrainFlow to undercut the competition easily when it comes to price. Order processors make even less than assistants but about the same as billing processors. All work is very specialized, but employees are often dependent on another job category to perform at their most efficient level.

Like most plumbing companies, DrainFlow gets business mostly from the Internet. Customers either call in to describe a plumbing problem or submit an online request for plumbing services, receiving a return call with information within 24 hours. In either case, DrainFlow's order processors listen to the customer's description of the problem to determine whether a plumber or a plumber's assistant should make the service call. The job is then assigned accordingly, and a service provider goes to the location. When the job has been completed, a billing representative relays the fee to the service representative via cell phone, who presents a bill to the customer for payment. Billing representatives can take customers' credit card payments by phone or e-mail an invoice for online payment.

The Problem

Although specialization does cut costs significantly, Reynaldo is worried about customer dissatisfaction. According to her survey, about 25 percent of customer contacts ended in no service call because customers were confused by the order processors' diagnostic questions and because the order processors did not have sufficient knowledge or skill to explain the situation. That means fully one in four people who call DrainFlow to hire a plumber are worse than dissatisfied: They are not customers at all! The remaining 75 percent of calls that did end in a customer service encounter resulted in other problems.

The most frequent complaints Reynaldo found in the customer surveys were about response time and cost, especially when the wrong person was sent to a job. A plumber's assistant cannot complete a more technically complicated job. The appointment has to be rescheduled, and the customer's time and the staff's time have been wasted. The resulting delay often caused customers in these situations to decline further contact with DrainFlow—many of them decided to go with Lightning Plumber.

"When I arrive at a job I can't take care of," says plumber's assistant Jim Larson, "the customer gets ticked off. They thought they were getting a licensed plumber since they were calling for a plumber. Telling them they have to have someone else come out does not go over well."

On the other hand, when a plumber responds to a job easily handled by a plumber's assistant, the customer is still charged at the plumber's higher pay rate. Licensed plumber Luis Berger also does not like being in the position of giving customers bad news. "If I get called out to do something like snake a drain, the customer is not expecting a hefty bill. I'm caught between a rock and a hard place—I don't set the rates or make the appointments, but I'm the one who gets it from the customer." Plumbers also resent being sent to do such simple work.

Ben McCarty is one of DrainFlow's order processors. He is also frustrated when the wrong person is sent to a job but feels he and the other order processors do the best they can. "We have a survey we are supposed to follow with the calls to find out what the problem is and who needs to take the job," he explains. "The customers don't know that we have a standard form, so they think we can answer all their questions. Most of us don't know any more about plumbing than the caller. If they don't use the terms on the survey, we don't understand what they're talking about. A plumber would, but we are not plumbers; we just take the calls."

Customer service issues also involve the billing representatives. They are the ones who have to keep contacting customers about payment. "It's not my fault the wrong guy was sent," says Elizabeth Monty. "If two people went out, that's two trips. If a plumber did the work, you pay plumber rates. Some of these customers don't get that I didn't take their first call, and so I get yelled at." The billing representatives also complain that they see only the tail end of the process, so they don't know what the original call entailed. The job is fairly impersonal and much of the work is recording customer complaints. Remember—40 percent of customers are not satisfied. The billing representatives take the brunt of their negative reactions on the phone.

As you can probably tell, all employees have to engage in emotional labor, as described in this text, and many lack the skills or personality traits to complete the customer interaction component of their jobs. They are not trained to provide customer service, and they see their work mostly in technical or mechanical terms. Quite a few are actually anxious about speaking directly with customers. The office staff (order processors and billing representatives) realize customer service is part of their job. Still, they also find dealing with negative feedback from customers and coworkers taxing.

A couple of years ago, a management consulting company was hired to survey DrainFlow worker attitudes. The results showed they were less satisfied than workers in other comparable jobs. The following table provides a breakdown of respondent satisfaction levels across several categories:

	DrainFlow Plumbers	DrainFlow Plumber's Assistants	DrainFlow Office Workers	Average Plumber	Average Office Worker
I am satisfied with the work that I am asked to do.	3.7	2.5	2.5	4.3	3.5
I am satisfied with my working conditions.	3.8	2.4	3.7	4.1	4.2
I am satisfied with my interactions with coworkers.	3.5	3.2	2.7	3.8	3.9
I am satisfied with my interactions with my supervisor.	2.5	2.3	2.2	3.5	3.4

The information about average plumbers and average office workers is taken from the management consulting company's records of other companies. They are not exactly surprising, given some of the complaints DrainFlow employees have made. Top managers at DrainFlow are worried about these results, but they have not formulated a solution. The traditional DrainFlow culture has been focused on cost containment, and employee satisfaction has not been a major issue.

The Proposed Solution

The company is in trouble, and as revenues shrink and the cost savings that were supposed to be achieved by dividing work fail to materialize, a change seems to be in order.

Reynaldo is proposing using cash rewards to improve performance among employees. She thinks if employees were paid based on work outcomes, they would work harder to satisfy customers. Because it is not easy to measure how satisfied people are with the initial call-in, Reynaldo wants to give the order processors a small reward for every 20 calls successfully completed. For the hands-on work, she would like to have each billing representative collect information about customer satisfaction for each completed call. If no complaints are made, and the job is handled promptly, a moderate cash reward would be given to the plumber or plumber's assistant. If the customer indicates real satisfaction with the service, a larger cash reward would be provided.

Reynaldo also wants to find people who are a better fit with the company's new goals. The current hiring procedure relies on unstructured interviews with each location's general manager. Little consistency is found in how these managers choose employees. Most lack training in customer service and organizational behavior. Reynaldo thinks it would be better if hiring methods were standardized across all branches in her region to help managers identify recruits who can actually succeed in the job.

Your Assignment

Your task is to prepare a report for Reynaldo on the potential effectiveness of her cash reward and structured interview programs. Make certain it is in the form of a professional business document that you would actually give to an experienced manager at this level of a fairly large corporation. Reynaldo is very smart when managing finances and running a plumbing business. Still, she will not necessarily know about the organizational behavior principles you are describing. Because any new proposals must be passed through top managers, you should also address their concerns about cost containment. You will need to make a strong, evidence-based financial case that changing the management style will benefit the company.

When you write, make sure you touch on the following points:

CC-11. Although employees are not especially satisfied with their work, do you think this is a reason for concern? Does research suggest satisfied workers are actually better at their jobs? Are any other behavioral outcomes associated with job satisfaction?

CC-12. Using job characteristics theory, explain why the present system of job design may be contributing to employee dissatisfaction. Describe some ways you could help employees feel more satisfied with their work by redesigning their jobs.

CC-13. Reynaldo has a somewhat vague idea about how to implement the cash rewards system. Describe some of the specific ways you would make the reward system work better, based on the case.

CC-14. Explain the advantages and disadvantages of using financial incentives in a program of this nature. What, if any, potential problems might arise if people are given money for achieving customer satisfaction goals? What other types of incentives might be considered?

CC-15. Create a specific plan to assess whether the reward system is working. What are the dependent variables that should change if the system works? How will you go about measuring success?

CC-16. What types of hiring recommendations would you make to find people better suited for these jobs? Which Big Five personality traits would be useful for the customer service responsibilities and emotional labor?

CASE 3

Building a Coalition

Learning Goals

Many of the most important organizational behavior challenges require coordinating plans and goals among groups. This case describes a multiorganizational effort, but the same principles of accommodation and compromise also apply when trying to work with multiple divisions within a single organization. You will create a blueprint for managing a complex development team's progress to steer team members away from negative conflicts and toward productive discussion. You will also be asked to help create a new message for executives so they can lead effectively.

Major Topic Areas

- Group dynamics
- Maximizing team performance
- Organizational culture
- Integrative bargaining

The Scenario

The Woodson Foundation, a large nonprofit social service agency, is teaming up with the public school system in Washington, DC, to improve student outcomes. There is ample room for improvement. The schools have problems with truancy, low student performance, and crime. New staff members quickly burn out as their initial enthusiasm for helping students is blunted by the harsh realities they encounter in the classroom. Turnover among new teachers is very high, and many of the best and brightest are the most likely to leave for schools that are not as troubled.

The plan is to create an experimental after-school program that will combine the Woodson Foundation's skills of raising private money and coordinating community leaders with the educational expertise of school staff. Ideally, the system will be financially self-sufficient, which is important because less money is available for schools than in the past. After several months of negotiation, the leaders of the Woodson Foundation and the school system have agreed that the best course is to develop a new agency that will draw on resources from both organizations. The Woodson Foundation will provide logistical support and program development and measurement staff; the school system will provide classrooms and teaching staff.

The first stage in bringing this new plan to fruition is the formation of an executive development team. This team will span multiple functional areas and establish the operating plan for improving school performance. Its cross-organizational nature means representatives from both the Woodson Foundation and the school district must participate. The National Coalition for Parental Involvement in Education (NCPIE) will also be a major partner in the program, acting as a representative for parents on behalf of the PTA.

Conflict and Agreement in the Development Team

While it would be perfect if all the groups could work together easily to improve student outcomes, there is little doubt some substantive conflicts will arise. Each group has its own interests, and, in some cases, these are directly opposed to one another.

School district representatives want to ensure that the new jobs will be unionized and operate consistently with current school board policies. They are very concerned that if Woodson assumes too dominant a role, the school board will not control the operations of the new system. The complexity of the school system has led to the development of a highly complex bureaucratic structure over time. Administrators want to make sure their policies and procedures will still hold for teachers in these programs, even outside the regular school day. They also worry that jobs going into the new system will take funding from other school district jobs.

Woodson, founded by entrepreneur Theodore Woodson around 1910, still bears the hallmarks of its founder's way of doing business. Woodson emphasized efficiency and experimentation in everything he did. Many of the foundation's charities have won awards for minimizing costs while still providing excellent services. Their focus on using hard data to measure performance for all their initiatives is inconsistent with the school district culture.

Finally, the NCPIE is driven by a mission to increase parental control. The organization believes that when communities can drive their own educational methods, students and parents can achieve success together. The organization is strongly committed to celebrating the diversity and inclusion of those from various backgrounds. Its members are most interested in how changes are made, ensuring that everyone can weigh in.

Some demographic diversity issues complicate the team's situation. Most of the students served by the Washington, DC, school district are Black, along with large populations of Hispanics. The NCPIE makeup generally matches the demographic diversity of the areas served by the public schools. The Woodson Foundation,

based in northern Virginia, is predominantly staffed by White professionals. There is some concern that this new group that will be so involved in this major change in educational administration does not understand the demographic concerns of the community. The leadership of the new program will have to be able to present a compelling message for generating enthusiasm for the program across diverse stakeholder groups.

Although the groups differ in important ways, it is also worth considering what they have in common. All are interested in meeting the needs of students. All would like to increase student learning. The school system does benefit from anything that increases student test scores. The Woodson Foundation and NCPIE are united in their desire to see more parents engaged in the system.

Candidates for the Development Team

The development team will consist of three individuals—an HR representative from the Woodson Foundation, one from the school system, and one from the NCPIE. They have prepared the following list of potential candidates for consideration.

Victoria Adams is the superintendent of schools for Washington, DC. She spearheaded the initial communication with the Woodson Foundation and has been building support among teachers and principals. She thinks the schools and the foundation need to have larger roles than the parents and communities. "Of course, we want their involvement and support, but as professionals, we should have more say when it comes to making decisions and implementing programs. We do not want to shut anyone out, but we have to be realistic about what the parents can do."

Duane Hardy has been a principal in the Washington area for more than 15 years. He also thinks the schools should have the most power. "We are the ones who work with these kids every day. I have watched class sizes get bigger, and scores and graduation rates go down. Yes, we need to fix this, but these outside groups cannot understand the limitations we are dealing with. We have the community, the politicians, the taxpayers—everyone watching what we are doing, everyone thinking they know what is best. The parents, at least, have more of a stake in this."

"The most important thing is the kids," says second-year teacher Ari Kaufman, who is well liked by his students but does not get along well with other faculty members. He is seen as a "squeaky wheel." "The schools need change so badly. And how did they get this way? From too little outside involvement."

Community organizer Mason Dupree does not like the level of bureaucracy either. He worries that the school's answer to its problems is to throw more money at them. "I know these kids. I grew up in these neighborhoods. My parents knew every single teacher I had. The schools wanted our involvement then. Now all they want is our money. And I would not mind giving it to them if I thought it would be used responsibly, not spent on raises for people who have not shown they can get the job done."

Meredith Watson, with the Woodson Foundation, agrees the schools have become less focused on the families. A former teacher, she left the field of education after being in the classroom for 6 years. "There is so much waste in the system," she complains. "Jobs are unnecessarily duplicated, change processes are needlessly convoluted. Unless you are an insider already, you can't get anything done. These parents want to be involved. They know their kids best."

Unlike her NCPIE colleagues, Candace Sharpe thinks the schools are doing the best they can. She is a county social worker, relatively new to the DC area. "Parents say they want to be involved but then don't follow through. *We* need to step it up. *We* need to lead the way. Lasting change doesn't come from the outside; it comes from the home."

Victor Martinez has been at the Woodson Foundation for 10 years, starting as an intern straight out of college. "It's sometimes hard to see a situation when you're in the thick of it," he explains. "Nobody likes to be told they're doing something wrong, but sometimes it has to be said. We all know there are flaws in the system. We can't keep the status quo. It just isn't cutting it."

Strategies for the Program Team

Once the basic membership and principles for the development team have been established, the program team would also like to develop a handbook for those who will be running the new program. Ideally, this set of principles can help train new leaders to create an inspirational message that will facilitate success. The actual content of the program and the nature of the message will be hammered out by the development team. However, it is still possible to generate some overriding principles for the program team in advance of these decisions.

Your Assignment

The Woodson Foundation, the NCPIE, and the schools have asked you to provide some information about forming teams effectively. They would like your response to explain what should be done at each step of the way, from selecting appropriate team members to setting group priorities and goals, setting deadlines, and describing effective methods for resolving conflicts that arise. After this, they would like you to prepare a short set of principles for the newly established program leaders. That means you will have two audiences: the development team, which will receive one report on how it can effectively design the program, and the program team, which will receive one report on how it can effectively lead the new program.

The following points should help you form a comprehensive message for the development team:

CC-17. The development team will be more effective if members have some idea about how groups and teams typically operate. Review the dominant perspectives on team formation and performance from the chapters in the text for the committee to know what to expect.

CC-18. Given the profiles of candidates for the development team, provide suggestions for who would likely be a good group member and who might be less effective in this situation. Be sure you are using the research on groups and teams in the text to defend your choices.

CC-19. Using principles from the chapters on groups and teams, describe how you will advise the team to manage conflict effectively.

CC-20. Describe how integrative negotiation strategies might achieve joint goals for the development team.

The following points should help you form a message for the program team:

CC-21. Leaders of the new combined organization should have a good idea of the culture of the school district, the NCPIE, and the Woodson Foundation because they will need to manage relationships with all three groups on an ongoing basis. How would you describe the culture of these various stakeholder organizations? Use concepts from the chapter on organizational culture to describe how they differ and how they are similar.

CC-22. Consider how leaders of the new program can generate a transformational message and encourage employee and parent trust. Using material from the chapter on leadership, describe how you would advise leaders to accomplish these ends.

CC-23. Given the potential for demographic faultlines in negotiating these changes, what would you advise as a strategy for managing diversity issues for program leaders?

CASE 4

Boundaryless Organizations

Learning Goals

The multinational organization is an increasingly common and important part of the economy. This case takes you into the world of a cutting-edge music software business seeking success across three very different national and organizational cultures. Its managers need to make important decisions about how to structure work processes so employees can be satisfied and productive doing very different tasks.

Major Topic Areas

- Organizational structure and boundaryless organizations
- Organizational culture
- Human resources
- Organizational socialization

The Scenario

Newskool Grooves is a transnational company developing music software. The software is used to compose music, play music in clubs, and produce albums. Founder and CEO Gerd Finger is, understandably, the company's biggest fan. "I started this company from nothing, from just me, my ideas, and my computer. I love music—love playing music, love writing programs for making music, love listening to music—and the money is nice, too." Finger says he never wanted to work for someone else, to give away his ideas and let someone else profit from them. He wanted to keep control over them and their image. "Newskool Grooves is always ahead of the pack. In this business, if you cannot keep up, you are out. And we are the company everyone else must keep up with. Everyone knows when they get something from us, they are getting only the best and the newest."

The company headquarters are in Berlin. The headquarters are the nerve center for the organization, where new products are developed and the organizational strategy is established. Newskool outsources a great deal of its coding work to programmers in Kiev, Ukraine. Its marketing efforts are increasingly based in its Los Angeles offices. This division of labor is at least partially based on technical expertise and cost issues. The German team excels at design and production tasks. Because most of Newskool's customers are English speakers, the Los Angeles office has been the best group to write ads and market products. The Kiev offices are filled with outstanding programmers who do not require the very high compensation rates you would find in German or US offices. The combination

of high-tech software, rapid reorganization, and outsourcing make Newskool the very definition of a boundaryless organization.

Finger also makes the final decision on hiring every employee for the company and places a heavy emphasis on independent work styles. "Why would I want to put my company in the hands of people I can't count on?" he asks with a laugh. "They have to believe in what we are doing here, really understand our direction, and be able to go with it. I'm not the babysitter; I'm not the schoolmaster handing out homework. School time is over. This is the real world."

The Work Culture

Employees want to work at this company because it is cutting edge. Newskool's software is used by several electronic dance music (EDM) DJs, the firm's core market, seeing it as a relatively expensive but very high-quality and innovative brand. Whenever the rest of the market for music software goes in one direction, it seems like Newskool heads in a completely different direction to keep itself separate from the pack. This strategy has tended to pay off. While competitors develop similar products and therefore need to lower their prices continually to compete with one another, Newskool has kept revenues high by creating completely new types of products that do not face this type of price competition.

Unfortunately, piracy has eroded Newskool's ability to make money with just software-based music tools. It has had to move into hardware production, such as drum machines and amplifiers that incorporate its computer technology. Making this massive market change might be challenging for some companies. Still, for an organization that reinvents itself every two or three years as Newskool does, the bigger fight is a constant war against stagnation and rigidity.

The organization has a very decentralized culture. With only 115 employees, the original management philosophy of allowing all employees to participate in decision making and innovation is still the lifeblood of the company's culture. One developer notes, "At Newskool, they want you to be part of the process. If you are a person who wants to do what you're told at work, you're in trouble. Most times, they can't tell you what they want you to do next—they don't even know what comes next! That's why they hire creative employees, people who can try to make the next thing happen. It's challenging, but a lot of us think it's very much an exciting environment."

The Boundaryless Environment

Because so much of the work can be performed on computers, Finger decided early to allow employees to work outside the office. The senior management in Berlin and Los Angeles are both quite happy with this arrangement. Because some marketing work does require face-to-face contact, the Los Angeles office has weekly in-person meetings. Employees who like Newskool are happiest when they can work through the night and sleep most of the day, firing up their computers to get work done at the drop of a hat. Project discussions often happen via social networking on the company's intranet.

The Kiev offices have been less eager to work with the boundaryless model. Managers say their computer programmers find working with so little structure rather uncomfortable. They are more used to the idea of a strong leadership structure and well-defined work processes.

"When I started," says one manager, "Gerd said getting in touch with him would be no problem; getting in touch with LA would be no problem. We're small, we're family, he said. Well, it is a problem. When I call LA, they say to wait until their meeting day. I can't always wait until they decide to get together. I call Gerd—he says, 'Figure it out.' Then when I do, he says it isn't right, and we have to start again. If he just told me in the first place, we would have done it."

Some recent events have also shaken up the company's usual way of doing business. Developers in the corporate offices had a major communications breakdown about their hardware DJ controller, which required many hours of discussion to resolve. It seems that people who seldom met face-to-face had all made progress—but had moved in opposite directions. To test and design the company's hardware products, employees apparently need to do more than send each other code; sometimes, they need to collaborate face to face. Some spirited disagreements have been voiced within the organization about how to move forward in this new environment.

The offices are experiencing additional difficulties. Since the shift to newer products, Sandra Pelham has been more critical of the company in the Los Angeles office. "With the software, we were more limited in the kinds of advertising media we could access. So now, with the hardware—real instruments—we finally thought, 'All right, this is something we can work with!' We had a whole slate of musicians and DJs and producers to contact for endorsements, but Gerd said, 'No way.' He did not want customers who only cared that a celebrity liked us. He scrapped the whole campaign. He says we are all about creativity and doing our own thing—until we do not want to do things his way."

Although the organization is not without problems, there is little question Newskool has been a standout success in the computer music software industry. While many are shuttering their operations, Newskool uses its market power to push forward the next generation of electronic music-making tools. As Gerd Finger puts it, "Once the rest of the industry has gotten together and figured out how they are all going to cope with change, they will look around and see that we're already three miles ahead of them down the road to the future."

Your Assignment

Finger has asked for your advice on how to keep his organization successful. He wants to benchmark how other boundaryless organizations in the tech sector stay competitive despite the challenge of so many workers heading in so many different directions. You will need to prepare a report for the company's executive committee. Your report should read like a proposal to a corporate executive who has a great deal of knowledge about the technical aspects of their company but might not have much knowledge of organizational behavior.

When you write, make sure you touch on the following points:

CC-24. Identify some of the problems likely to occur in a boundaryless organization like Newskool Grooves. What are the advantages of boundaryless organizations?

CC-25. Consider some of the cultural issues that will affect a company operating in such different parts of the world and whose employees may not represent the national cultures of each country. Are the conflicts you observe a function of the different types of work people have to perform?

CC-26. Based on what you know about motivation and personality, what types of people are likely to be satisfied in each area of the company? Use concepts from job characteristics theory and the emerging social relationships perspective to describe what might need to change to increase employee satisfaction in all areas.

CC-27. What types of human resources practices need to be implemented in this sort of organization? What principles of selection and hiring are likely to be effective? Which Big Five traits and abilities might Newskool supervisors want to use for selection?

CC-28. What kind of performance measures might you want to see for each office?

CC-29. How can the company establish a socialization program that will maximize employee creativity and independence? Do employees in all its locations need equal levels of creativity?

CASE 5

The Stress of Caring

Learning Goals

One of the most consistent changes in work structure over the past few decades has been a shift from a manufacturing economy to a service economy. More workers are now engaged in jobs that include providing care and assistance, especially in education and medicine. This work is satisfying for some people, but it can also be highly stressful. In the following scenario, consider how a company in the nursing care industry responds to the challenges of the new environment.

Major Topic Areas

- Stress
- Organizational change
- Emotions
- Leadership

The Scenario

Parkway Nursing Care is an organization facing a massive change. The company was founded in 1982 with just two nursing homes in Phoenix, Arizona. The company was very successful, and throughout the 1990s, it continued to turn a consistent profit while slowly acquiring or building 30 more units. This low-profile approach changed forever in 2003 when venture capitalist Robert Quine decided to make a major investment in expanding Parkway in return for a portion of its profits over the coming years. The number of nursing homes exploded, and Parkway was operating 180 homes by the year 2010.

The company now has 220 facilities in the southwestern United States, with an average of 115 beds per facility and a total of nearly 30,000 employees. In addition to health care facilities, it also provides skilled in-home nursing care. Parkway is seen as one of the best care facilities in the region, and it has won numerous awards for its achievements in the field.

As members of the baby boom generation become senior citizens, the need for skilled care will only increase. Parkway wants to make sure it is in a good position to meet this growing need. This means the company must continue expanding rapidly.

The pressure for growth is one significant challenge, but it is not the only one. The nursing home industry has come under increased government scrutiny following investigations that turned up widespread patient abuse and billing fraud. Parkway has always had outstanding patient care. No substantiated claim of abuse or neglect in any of its homes has ever been

made. However, the need for increased documentation will still affect the company. As the federal government tries to trim Medicare expenses, Parkway may face a reduction in funding.

The Problem

As growth continues, Parkway has remained committed to maintaining the dignity and health of all residents in its facilities. The board of directors wants to see a renewed commitment to the firm's mission and core values, not a diffusion of its culture. Its members are worried there might be problems to address. Interviews with employees suggest there is plenty to worry about.

Shift leader Maxine Vernon has been with Parkway for 15 years. "Now that the government keeps a closer eye on our staffing levels, I've seen management do what it can to keep positions filled, and I don't always agree with who is hired. Some of the basic job skills can be taught, sure, but how to *care* for our patients—a lot of these new kids just don't pick up on that."

"The problem isn't with staff—it's with Parkway's focus on filling the beds," says nurse's aide Bobby Reed. "When I started here, Parkway's reputation was still about the service. Now it's about numbers. No one is intentionally negligent—there just are too many patients to see."

A recent college graduate with a BA in psychology, Dalton Manetti is more stressed than he expected. "These aren't the sweet grannies you see in the movies. Our patients are demanding. They complain about everything, even about being called patients, probably because most of them think they shouldn't be here in the first place. A lot of times, their gripes amount to nothing, but we have to log them in anyway."

Carmen Frank has been with Parkway for almost a year and is already considering finding a new job. "I knew there were going to be physical parts to this job, and I thought I'd be able to handle that. It's not like I was looking for a desk job, you know? After every shift, I go home with aches all over—my back, arms, and legs. I've never had to take so much time off from a job because I hurt. And then when I come back, I feel like the rest of the staff thinks I'm weak."

Year	Number of Patients	Injuries per Staff Member	Incidents per Patient	Certified Absences per Staff Member	Other Absences per Staff Member	Turnover Rate
2010	21,200	3.32	4.98	4.55	3.14	0.31
2011	22,300	3.97	5.37	5.09	3.31	0.29
2012	22,600	4.87	5.92	4.71	3.47	0.28
2013	23,100	4.10	6.36	5.11	3.61	0.35
2014	23,300	4.21	6.87	5.66	4.03	0.31
2015	23,450	5.03	7.36	5.33	3.45	0.28
2016	23,600	5.84	7.88	5.28	4.24	0.36
2017	24,500	5.62	8.35	5.86	4.06	0.33
2018	24,100	7.12	8.84	5.63	3.89	0.35
2019	25,300	6.95	9.34	6.11	4.28	0.35

"I started working here right out of high school because it was the best-paid of the jobs I could get," says Niecey Wilson. "I had no idea what I was getting myself into. Now I really like my job. Next year I'm going to start taking some night classes so I can move into another position. But some of the staff just think of this as any other job. They don't see the patients as people, more like inventory. If they want to work with inventory, they should get a job in retail."

Last month, the company's human resources department pulled the above information from its records at the board of directors' request. The numbers provide some quantitative support for the concerns voiced by staff.

Injuries to staff occur mostly because of back strain from lifting patients. Patient incidents reflect injuries due to slips, falls, medication errors, or other accidents. Certified absences are days off from work due to medically verified illnesses or injuries. Other absences are days missed that are not due to injuries or illnesses; these are excused absences (unexcused absences are grounds for immediate firing).

Using Organizational Development to Combat Stress and Improve Performance

The company wants to use organizational development methods such as appreciative inquiry (AI) to create change and re-energize its sense of mission. As the chapter on organizational change explains, AI procedures systematically collect employee input and then use this information to create a change message everyone can support. The human resources department conducted focus groups, asking employees to describe their concerns and suggestions for the future. The focus groups highlighted many suggestions, although they do not all suggest movement in the same direction.

Many suggestions concerned schedule flexibility. One representative comment was this: "Most of the stress on this job comes because we can't take time off when we need it. The LPNs [licensed practical nurses, who do much of the care] and orderlies can't take time off when they need to. Still, many of them are single parents or primary caregivers for their own children. When they have to leave for child care responsibilities, the work suffers, and there's no contingency plan to help smooth things over. Then everyone who is left has to work extra hard. The person who takes time off feels guilty, and there can be fights over taking time off. If we had some way of covering these emergency absences, we'd all be a lot happier, and I think the care would be a lot better."

Other suggestions proposed better methods for communicating information across shifts. Most of the documentation for shift work is done in large spiral notebooks. When a new shift begins, staff members say they don't have much time to check on what happened in the previous shift. Some younger caregivers would like to have a method that lets them document patient outcomes electronically because they type faster than they can write. The older caregivers are more committed to the paper-based process, in part because they think switching systems would require a lot of work. (Government regulations on health care reporting require that any documentation be made in a form that cannot be altered after the fact to prevent covering up abuse, so specialized software systems must be used for electronic documentation.)

Finally, the nursing care staff believes its perspectives on patient care are seldom given an appropriate hearing. "We're the ones who are with the patients most of the time, but when it comes to doing this the right way, our point of view gets lost. We really could save a lot of money by eliminating some of these unnecessary routines and programs. Still, it's something management always just says it will consider."

Staff members seem to want some way to provide suggestions for improvement, but it is unclear what method they would prefer.

Your Assignment

Parkway has taken some initial steps in this new direction, but clearly, it has a lot of work left to do. As a change management consultant, you have been brought in to help the company change its culture and respond to the stress that employees experience. Remember to create your report as if it is for the leadership of a major corporation.

When you write your recommendations, make sure you touch on the following points:

CC-30. What do the data on employee injuries, incidents, absences, and turnover suggest to you? Is there a reason for concern about the company's direction?

CC-31. The company will be making some significant changes based on the AI process, and most change efforts are associated with resistance. What are the most common forms of resistance, and which would you expect to see at Parkway?

CC-32. Given the board of directors' desire to re-energize the workforce, what advice would you provide for creating a leadership strategy? What leader behaviors should nursing home directors and nurse supervisors demonstrate?

CC-33. What are the major sources of job stress at Parkway? What does the research on employee stress suggest you should do to help minimize the experience of psychological strain for employees? Create a plan for how to reduce stress among employees.

CC-34. Based on the information collected in the focus groups, design a survey to hand out to employees. What sort of data should the survey gather? What types of data analysis methods would you like to employ for these data?

Glossary

ability An individual's capacity to perform the various tasks in a job.

abusive supervision Supervision that is hostile both verbally and nonverbally.

accommodating The willingness of one party in a conflict to place the opponent's interests above their own.

action research A change process based on systematic collection of data and then selection of a change action based on what the analyzed data indicate.

affect A term used to describe a broad range of feelings that people experience, including emotions and moods.

affect intensity Individual differences in the strength with which individuals experience their emotions.

affective component The emotional or feeling segment of an attitude.

affective events theory (AET) A model suggesting that workplace events cause emotional reactions on the part of employees, which then influence workplace attitudes and behaviors.

agreeableness A personality dimension that describes someone who is good natured, cooperative, and trusting.

allostasis Working to change behavior and attitudes to find stability.

anchoring bias A tendency to fixate on initial information, from which one then fails to adjust adequately for subsequent information.

anthropology The study of societies to learn about human beings and their activities.

applicant attraction The degree to which an individual is drawn toward an organization, intends to apply for a job at that organization, and would accept a job offer there if given one.

appreciative inquiry An approach that seeks to identify the unique qualities and special strengths of an organization, which can then be built on to improve performance.

arbitrator A third party to a negotiation who has the authority to dictate an agreement.

assessment centers Off-site locations where candidates are given a set of performance-simulation tests designed to evaluate their managerial potential.

asynchronous communication Communication episodes in which messages are received outside of a physically or psychologically present communication exchange.

attitudes Judgments or evaluative statements about objects, people, or events.

attribution theory An attempt to explain the ways we judge people differently, depending on the meaning we attribute to a behavior, such as determining whether an individual's behavior is internally or externally caused.

attribution theory of leadership A leadership theory stating that leadership is merely an attribution that people make about other individuals.

authentic leaders A leadership style in which leaders "know who they are" **(i.e.,** self-awareness), are anchored by their mission, consider others' opinions and all relevant information before acting, and display their true selves when interacting with employees.

authority The rights inherent in a managerial position to give orders and to expect the orders to be obeyed.

automatic processing A relatively superficial consideration of evidence and information that takes little time or effort and makes use of heuristics.

autonomy The degree to which a job provides substantial freedom and discretion to the individual in scheduling the work and in determining the procedures to be used in carrying it out.

availability bias The tendency for people to base their judgments on information that is readily available to them.

avoiding The desire to withdraw from or suppress a conflict.

BATNA The **b**est **a**lternative **t**o a **n**egotiated **a**greement; the least a party in a negotiation should accept.

behavioral component An intention to behave in a certain way toward someone or something.

behavioral ethics Analyzing why people behave the way they do when confronted with ethical dilemmas.

behavioral theories of leadership Theories proposing that specific behaviors differentiate leaders from nonleaders.

behaviorally anchored rating scales (BARS) Scales that combine major elements from the critical incident and graphic rating scale approaches. The appraiser rates employees based on items along a continuum, but the points are examples of actual behavior on the given job rather than general descriptions or traits.

behaviorism A theory stating that behavior follows stimuli in a relatively unthinking manner.

Big Five Model A personality model that proposes five basic dimensions encompass most of the differences in human personality.

biographical characteristics Personal characteristics—such as age, gender, race, and ethnicity—that are objective and easily obtained from personnel records. These characteristics are representative of surface-level diversity.

bonus A pay plan that rewards employees for recent performance rather than historical performance.

boundary spanning Individuals forming relationships outside their formally assigned groups.

bounded rationality A simplified process of making decisions by perceiving and interpreting the essential features of problems without capturing their complexity.

brainstorming An idea-generation process that specifically encourages any and all alternatives while withholding any criticism of those alternatives.

bureaucracy An organizational structure with highly routine operating tasks achieved through specialization, very formalized rules and regulations, tasks that are grouped into functional departments, centralized authority, narrow spans of control, and decision making that follows the chain of command.

burnout A work-related mental health syndrome characterized by emotional exhaustion, depersonalization, and reduced personal accomplishment.

centralization The degree to which decision making is concentrated at a single point in an organization.

chain of command The unbroken line of authority that extends from the top of the organization to the lowest echelon and clarifies who reports to whom.

challenge stressors Stressors associated with workload, pressure to complete tasks, and time urgency.

change When things become different than the way they were.

change agents People who act as catalysts and assume the responsibility for managing change activities.

channel richness The amount of information that can be transmitted during a communication episode.

charismatic leadership theory A leadership theory stating that followers make attributions of heroic or extraordinary leadership abilities when they observe certain behaviors (e.g., those that are values-driven, symbolic, or emotional).

circular structure An organizational structure in which executives are at the center, spreading their vision outward in rings grouped by function (managers, then specialists, then workers).

citizenship Actions that contribute to the psychological environment of the organization, such as helping others when not required.

coercive power A power base that depends on fear of the negative results from failing to comply.

cognitive component The opinion or belief segment of an attitude.

cognitive dissonance Any incompatibility between two or more attitudes or between behavior and attitudes.

cognitive evaluation theory A sub-theory of self-determination theory in which extrinsic rewards for behavior tend to decrease the overall level of motivation, if the rewards are seen as controlling or reduce their sense of competence.

cohesion The shared bond driving group members to work together and stay in the group.

collaborating A situation in which the parties involved in a conflict all desire to fully satisfy the concerns of all parties.

collectivism A national culture attribute that describes a tight social framework in which people expect others in groups of which they are a part to look after them and protect them.

common ingroup identity The idea that bias can be reduced and inclusion can be fostered by transforming workers' focus on what divides them (e.g., "us" and "them") to what unites them (e.g., "we").

communication The transfer and the understanding of meaning.

communication apprehension Undue tension and anxiety about communication.

competing A desire to satisfy one's interests, regardless of the impact on the other party to the conflict.

compromising A situation in which each party to a conflict is willing to give up something to resolve the conflict.

conceptual skills The mental ability to analyze and diagnose complex situations.

conciliator A trusted third party who provides an informal communication link between the negotiator and the negotiation partner.

confirmation bias The tendency to seek out information that reaffirms past choices and to discount information that contradicts past judgments.

conflict A process that begins when one party perceives that another party has negatively affected or is about to negatively affect something that the first party cares about.

conflict management The use of resolution and stimulation techniques to achieve the desired level of conflict.

conformity The adjustment of one's behavior to align with the norms of the group.

conscientiousness A personality dimension that describes someone who is responsible, dependable, persistent, and organized.

consideration The extent to which a leader has job relationships that are characterized by mutual trust, respect for subordinates' ideas, and regard for their feelings.

contact hypothesis The idea that the more people from diverse backgrounds interact with one another, the more prejudice and discrimination between the groups will decrease over time.

contingency variables Situational factors or variables that moderate the relationship between two or more variables.

contingent selection Methods used as final checks for candidates who passed substantive selection before giving them an employment offer.

contrast effect Evaluation of a person's characteristics that is affected by comparisons with other people recently encountered who rank higher or lower on the same characteristics.

controlled processing A detailed consideration of evidence and information relying on facts, figures, and logic.

controlling Monitoring activities to ensure that they are being accomplished as planned and correcting any significant deviations.

core self-evaluation (CSE) Bottom-line conclusions individuals have about their capabilities, competence, and worth as a person.

core values The primary or dominant values that are accepted throughout the organization.

corporate social responsibility (CSR) An organization's self-regulated actions to benefit society or the environment beyond what is required by law.

cost-minimization strategy A strategy that emphasizes tight cost controls, avoidance of unnecessary innovation or marketing expenses, and price cutting.

counterproductive work behavior (CWB) Actions that actively damage the organization, including stealing, behaving aggressively toward coworkers, or being late or absent.

creativity The ability to produce novel and useful ideas.

critical incidents A way of evaluating an employee's behaviors that are key in making the difference between executing a job effectively and executing it ineffectively.

cross-functional team A team of employees from about the same hierarchical level but from different work areas who come together to accomplish a task.

cultural intelligence (CQ) A worker's ability to effectively function in culturally diverse settings and situations.

cultural tightness-looseness The degree to which there are clear, pervasive norms within societies, a clear understanding of sanctions for violating those norms, and no tolerance for deviating from those norms.

Dark Triad A constellation of negative personality traits consisting of Machiavellianism, narcissism, and psychopathy.

decisions Choices made from among two or more alternatives.

deep acting Trying to modify one's true feelings based on display rules.

deep-level diversity Differences in values, personality, and work preferences that become progressively more important for determining similarity as people get to know one another better.

defensive behaviors Reactive and protective behaviors to avoid action, blame, or change in a political environment.

demands Responsibilities, pressures, obligations, and even uncertainties that individuals face in the workplace.

demography The degree to which members of a work unit share a common demographic attribute, such as age, gender identity, race, educational level, or organizational tenure.

deonance A perspective in which ethical decisions are made because you "ought to" in order to be consistent with moral norms, principles, standards, rules, or laws.

departmentalization The basis by which jobs in an organization are grouped together.

dependence *B*'s relationship to *A* when *A* possesses something that *B* requires.

deviant workplace behavior Voluntary behavior that violates significant organizational norms and, in so doing, threatens the well-being of the organization or its members. Also called antisocial behavior or workplace incivility.

discrimination Actions or behaviors that create, maintain, or reinforce some groups' advantages over other groups and their members.

disparate impact When employment practices have an unintentional discriminatory effect on a legally protected group of people.

disparate treatment When employment practices have an intentional discriminatory effect on a legally protected group of people.

displayed emotions Emotions that are organizationally required and considered appropriate in a given job.

distributive bargaining Negotiation that seeks to divide up a fixed amount of resources; a win–lose situation.

distributive justice Perceived fairness of the amount and allocation of rewards among individuals.

diversity The extent to which members of a group are similar to, or different from, one another.

diversity climate The shared perceptions of diversity-enhancing policies, practices, and procedures among members of an organization.

diversity culture The shared diversity values, prioritization of diversity, and belief that it should be fostered by members of an organization.

diversity management The use of evidence-based strategies to manage and leverage the inherent diversity of the workforce.

divisional structure An organizational structure that groups employees into units by product, service, customer, or geographical market area.

dominant culture A culture that expresses the core values that are shared by most of the organization's members.

downsizing A systematic effort to make an organization leaner by closing locations, reducing staff, or selling off business units that do not add value.

driving forces Forces that direct behavior away from the status quo.

dyadic conflict Conflict that occurs between two people.

dysfunctional conflict Conflict that hinders group performance.

effectiveness The degree to which an organization meets the needs of its clientele or customers.

efficiency The degree to which an organization can achieve its ends at a low cost.

emotional contagion The process by which people's emotions are caused by the emotions of others.

emotional dissonance Inconsistencies between the emotions people feel and the emotions they project.

emotional intelligence (EI) The ability to detect and to manage emotional cues and information.

emotional labor An employee's organizationally desired emotions during interpersonal transactions at work.

emotional stability A personality dimension that characterizes someone as calm, self-confident, and secure (positive) versus nervous, anxious, and insecure (negative).

emotion regulation The process of identifying and modifying felt emotions.

emotions Intense, discrete, and short-lived feeling experiences, often caused by a specific event.

employee engagement The degree of enthusiasm an employee feels for the job.

employee involvement and participation (EIP) A participative process that uses the input of employees to increase employee commitment to organizational success.

employee recognition program A plan to encourage specific employee behaviors by formally appreciating specific employee contributions.

employee stock ownership plan (ESOP) A company-established benefits plan in which employees acquire stock, often at below-market prices, as part of their benefits.

encounter stage The stage in the socialization process in which a new employee sees what the organization is really like and confronts the possibility that expectations and reality may diverge.

environment Forces outside an organization that potentially affect the organization's structure.

equity Striving to provide access to the same opportunities for all workers, recognizing that some people are afforded privileges while others are confronted with barriers.

equity theory A theory stating that individuals compare their job inputs and outcomes with those of others and then respond to eliminate any inequities.

escalation of commitment An increased commitment to a previous decision despite negative information.

ethical culture The shared concept of right and wrong behavior in the workplace that reflects the true values of the organization and shapes the ethical decision making of its members.

ethical dilemmas and ethical choices Situations in which individuals are required to define right and wrong conduct.

eustress A healthy, positive, and constructive appraisal of stressors.

evidence-based management (EBM) Basing managerial decisions on the best available scientific evidence.

exit Dissatisfaction expressed through behavior directed toward leaving the organization.

expatriate A person who works outside their native country.

expectancy theory A theory that suggests the strength of a tendency to act in a certain way depends on the strength of an expectation that the act will be followed by a given outcome and on the attractiveness of that outcome to the individual.

expert power Influence based on expertise, special skills, or knowledge.

extroversion A personality dimension describing someone who is sociable, gregarious, and assertive.

faultlines The perceived divisions that split groups into two or more subgroups based on individual differences such as gender, race, and age.

feedback The degree to which carrying out the work activities required by a job results in the individual obtaining direct and clear information about the effectiveness of their performance.

felt conflict Emotional involvement in a conflict that creates anxiety, tenseness, frustration, or hostility.

felt emotions An individual's actual emotions.

femininity A national culture attribute that indicates little differentiation between male and female roles; a high rating indicates that women are treated as the equals of men in all aspects of the society.

Fiedler contingency model The theory that effective groups depend on a proper match between a leader's style of interacting with subordinates and the degree to which the situation gives control and influence to the leader.

fixed pie The belief that there is only a set amount of goods or services to be divvied up between the parties.

flexible benefits A benefits plan that allows each employee to put together a benefits package tailored to their own needs and situation.

flextime Flexible work hours.

followership The capability of followers to put into practice a leader's vision or set of goals.

forced comparison Method of performance evaluation where an employee's performance is made in explicit comparison to others (e.g., an employee may rank third out of 10 employees in their work unit).

formal group A designated work group defined by an organization's structure.

formalization The degree to which jobs within an organization are standardized.

full range leadership model A model that suggests that there are a number of approaches or styles of leadership (i.e., transactional, transformational) which vary on a continuum from passive and ineffective to active and effective.

functional conflict Conflict that supports the goals of the group and improves its performance.

functional structure An organizational structure that groups employees by their similar specialties, roles, or tasks.

fundamental attribution error The tendency to underestimate the influence of external factors and overestimate the influence of internal factors when making judgments about the behavior of others.

gender identity People's deeply held sense of or identification with their own gender that does not necessarily match their sex at birth, is not visible to others, and cannot be neatly categorized.

general mental ability (GMA) An overall factor of intelligence, as suggested by the positive correlations among specific intellectual ability dimensions.

globalization The process in which worldwide integration and interdependence is promoted across national borders.

goal-setting theory A theory that intentions to work toward a goal are considered a major source of work motivation and lead to higher performance.

grapevine An organization's informal communication network.

graphic rating scale An evaluation method in which the evaluator rates performance factors on an incremental scale.

group Two or more individuals, interacting and interdependent, who have come together to achieve particular objectives.

group order ranking An evaluation method that places employees into a particular classification, such as quartiles.

groupshift A change between a group's decision and an individual decision that a member within the group would make; the shift can be toward either conservatism or greater risk, but it generally is toward a more extreme version of the group's original position.

groupthink A phenomenon in which the norm for consensus overrides the realistic appraisal of alternative courses of action.

halo effect The tendency to draw a positive general impression about an individual based on a single characteristic.

heredity Factors determined at conception; one's biological, physiological, and inherent psychological makeup.

hierarchy of needs Abraham Maslow's hierarchy of five needs—physiological, safety, social, esteem, and self-actualization.

high-context cultures Cultures that rely heavily on nonverbal and subtle cues in communication.

high-performance work system (HPWS) A group of human resources practices that work together and reinforce one another to improve organizational outcomes.

hindrance stressors Stressors that keep you from reaching your goals, for example, red tape, office politics, and confusion over job responsibilities.

hindsight bias The tendency to believe falsely, after an outcome of an event is known, that one would have accurately predicted that outcome.

horns effect The tendency to draw a negative general impression about an individual based on a single characteristic.

human capital resources The capacities of a work unit derived from the collective knowledge, skills, abilities, and other resources of the organization's workforce.

hygiene factors Factors—such as company policy and administration, supervision, and salary—that, when adequate in a job, placate workers and limit job dissatisfaction.

idea champions Individuals who take an innovation and actively and enthusiastically promote the idea, build support, overcome resistance, and ensure that the idea is implemented.

idea evaluation The process of creative behavior involving the evaluation of potential solutions to problems to identify the best one.

idea generation The process of creative behavior that involves developing possible solutions to a problem from relevant information and knowledge.

illusory correlation The tendency of people to associate two events when in reality there is no connection.

imitation strategy A strategy that seeks to move into new products or new markets only after their viability has already been proven.

implicit bias Prejudice that may be hidden outside one's conscious awareness.

impression management (IM) The process by which individuals attempt to control the impressions that others form of them.

inclusion Creating an environment where all people feel valued, welcomed, and included.

individual ranking An evaluation method that rank-orders employees from best to worst.

individualism A national culture attribute that describes the degree to which people prefer to act as individuals rather than as members of groups.

influence tactics Ways in which individuals translate power bases into specific actions.

informal group A group that is not defined by an organization's structure; such a group appears in response to other needs, such as social clubs or interest groups.

information gathering The stage of creative behavior when possible solutions to a problem incubate in an individual's mind.

information overload A condition in which information inflow exceeds an individual's processing capacity.

informational justice The degree to which employees are provided truthful explanations for decisions.

initial selection Methods used to make preliminary rough cuts of initial applicants to decide whether they meet the basic qualifications for a job.

initiating structure The extent to which a leader defines and structures their role and those of their followers to facilitate goal attainment.

innovation An idea or solution judged to be novel and useful by relevant stakeholders.

innovation strategy A strategy that emphasizes the introduction of major new products and services.

inputs Variables like personality, group structure, and organizational culture that lead to processes.

institutions Cultural factors, especially those factors that might not lead to adaptive consequences, that lead many organizations to have similar structures.

instrumental values Preferable modes of behavior or means of achieving one's terminal values.

integrative bargaining Negotiation that seeks one or more settlements that can create a win–win solution.

intellectual abilities The capacity to do mental activities—thinking, reasoning, and problem solving.

interacting groups Typical groups in which members interact with each other, relying on both verbal and nonverbal communication.

intergroup conflict Conflict between different groups or teams.

intergroup development Organizational development (OD) efforts to change the attitudes, stereotypes, and perceptions that groups have of each other.

interpersonal justice The degree to which employees are treated with dignity and respect.

interrole conflict A situation in which the expectations of an individual's different, separate groups are in opposition.

intersectionality The idea that identities interact to form different meanings and experiences.

intractable problem A problem that may change entirely or become irrelevant before we finish the process of organizing our thoughts, gathering information, analyzing the information, and making judgments or decisions.

intragroup conflict Conflict that occurs within a group or team.

intuition An instinctive feeling not necessarily supported by research.

intuitive decision making An unconscious process created out of distilled experience.

job characteristics model (JCM) A model proposing that any job can be described in terms of five core job dimensions: skill variety, task identity, task significance, autonomy, and feedback.

job design The way the elements in a job are organized.

job engagement The investment of an employee's physical, cognitive, and emotional energies into job performance.

job enrichment Adding high-level responsibilities to a job to increase intrinsic motivation.

job insecurity The perception that one's job is at risk or that one's employment is not stable.

job involvement The degree to which a person identifies with a job, actively participates in it, and considers performance important to self-worth.

job performance The total value of a workers' contributions to an organization through their behaviors over a period of time.

job rotation The periodic shifting of an employee from one task to another.

job satisfaction A positive feeling about one's job resulting from an evaluation of its characteristics.

job sharing An arrangement that allows two or more individuals to split a traditional full-time job.

laissez-faire leadership A leadership style involving passive abdication and avoidance of leadership responsibilities.

leader–member exchange (LMX) theory A theory that suggests (1) leaders and followers have unique relationships that vary in quality and (2) these followers comprise ingroups and outgroups; subordinates with ingroup status will likely have higher performance ratings, less turnover, and greater job satisfaction.

leader–member relations The degree of confidence, trust, and respect that subordinates have in their leader.

leader–participation model A theory that suggests leaders should determine the extent to which leadership problems involve participation and shared responsibility with followers (and adjust accordingly).

leadership The ability to influence a group toward the achievement of a vision or set of goals.

leading A function that includes motivating employees, directing others, selecting the most effective communication channels, and resolving conflicts.

learning organization An organization that has developed the continuous capacity to adapt and change.

legitimate power Power based on a person's position in the formal hierarchy of an organization.

long-term orientation A national culture attribute that emphasizes the future, thrift, and persistence.

low-context cultures Cultures that rely heavily on words to convey meaning in communication.

loyalty Dissatisfaction expressed by passively waiting for conditions to improve.

Machiavellianism The degree to which an individual is pragmatic, maintains emotional distance, and believes that ends can justify means.

management by objectives (MBO) A program that encompasses specific goals, participatively set, for an explicit time period, with feedback on goal progress.

manager An individual who achieves goals through other people.

masculinity A national culture attribute that describes the extent to which the culture favors traditional masculine work roles of achievement, power, and control. Societal values are characterized by assertiveness and materialism.

material symbols Physical objects, or artifacts, that symbolize values, beliefs, or assumptions inherent in the organization's culture.

matrix structure An organizational structure that creates dual lines of authority and combines functional and product departmentalization.

McClelland's theory of needs A theory that states achievement, power, and affiliation are three important needs that help explain motivation.

mechanistic model A structure characterized by extensive departmentalization, high formalization, a limited information network, and centralization.

mediator A neutral third party who facilitates a negotiated solution by using reasoning, persuasion, and suggestions for alternatives.

mental model Team members' shared knowledge about the key elements within their task environment.

mentor A senior employee who sponsors and supports a less-experienced employee, called a protégé.

merit-based pay plan A pay plan based on performance appraisal ratings.

metamorphosis stage The stage in the socialization process in which a new employee changes and adjusts to the job, work group, and organization.

microaggressions Automatic, subtle, stunning exchanges between people that negatively impact those with minority or marginalized backgrounds.

mindfulness Reception, attention, and awareness of the present moment, events, and experiences.

model An abstraction of reality, a simplified representation of some real-world phenomenon.

moods Feelings that tend to be longer-lived and less intense than emotions and that lack a contextual stimulus.

moral emotions Emotions that have moral implications because of our instant judgment of the situation that evokes them.

motivating potential score (MPS) A predictive index that reflects the motivating potential in a job.

motivation The processes that account for an individual's intensity, direction, and persistence of effort toward attaining a goal.

multiteam system A collection of two or more interdependent teams that share a superordinate goal; a team of teams.

Myers-Briggs Type Indicator (MBTI) A personality test that taps four characteristics and classifies people into one of sixteen personality types.

narcissism The tendency to be arrogant, have a grandiose sense of self-importance, require excessive admiration, and possess a sense of entitlement.

need for achievement (nAch) The need to excel or achieve to a set of standards.

need for affiliation (nAff) The need to establish friendly and close interpersonal relationships.

need for autonomy The need to feel in control and autonomous at work.

need for cognition A personality trait of individuals depicting the ongoing desire to think and learn.

need for competence The need to feel like we are good at what we do or proud of it.

need for power (nPow) The need to make others behave in a way in which they would not have behaved otherwise.

negative affect An affective dimension that consists of emotions such as nervousness, stress, and anxiety at the high end.

neglect Dissatisfaction expressed through allowing conditions to worsen.

negotiation A process in which two or more parties communicate and confer with one another to come to a mutual agreement on the exchange of goods or services.

neutralizers Attributes that make it impossible for leader behavior to make any difference to follower outcomes.

nominal group technique A group decision-making method in which members meet to pool their judgments in a systematic but independent fashion.

norms Acceptable standards of behavior within a group that are shared by the group's members.

openness to experience A personality dimension that characterizes someone in terms of imagination, artistic sensitivity, and curiosity.

organic model A structure that is flat, uses cross-hierarchical and cross-functional teams, has low formalization, possesses a comprehensive information network, and relies on participative decision making.

organization A consciously coordinated social unit, composed of two or more people, that functions on a relatively continuous basis to achieve a common goal or set of goals.

organizational behavior (OB) A field of study that investigates the impact that individuals, groups, and structure have on behavior within organizations for the purpose of applying such knowledge toward improving an organization's effectiveness.

organizational citizenship behavior (OCB) Discretionary behavior that contributes to the psychological and social environment of the workplace.

organizational climate The shared perceptions that organizational members have about their organization and work environment; particularly, the policies, practices, and procedures that are in place.

organizational commitment The degree to which an employee identifies with a particular organization and its goals and wishes to maintain membership in the organization.

organizational culture A system of shared meaning held by an organization's members that distinguishes the organization from others. This system is characterized by values, beliefs, and underlying assumptions.

organizational development (OD) A collection of planned change interventions, built on humanistic–democratic values, that seeks to improve organizational effectiveness and employee well-being.

organizational identification The extent to which employees define themselves by the same characteristics that define their organization.

organizational justice An overall perception of what is fair in the workplace, composed of distributive, procedural, informational, and interpersonal justice.

organizational structure The way in which job tasks are formally divided, grouped, and coordinated.

organizational survival The degree to which an organization can exist and grow over the long term.

organizing Determining what tasks are to be done, who is to do them, how the tasks are to be grouped, who reports to whom, and where decisions are to be made.

outcome bias The tendency to judge the quality of a decision based on the desirability or believability of its outcome.

outcomes Key factors that are affected by other variables.

overconfidence bias A tendency to be overconfident about our own abilities or the abilities of others.

panel interviews Structured interviews conducted with a candidate and a number of panel members in a joint meeting.

paradox theory The theory that the key paradox in management is that there is no final optimal status for an organization.

participative management A process in which subordinates share a significant degree of decision-making power with their immediate superiors.

path–goal theory A theory stating that it is the leader's job to assist followers in attaining their goals and to provide the necessary direction and/or support to ensure that their goals are compatible with the overall objectives of the group or organization.

people skills The ability to work with, understand, and motivate other people, both individually and in groups.

perceived conflict Awareness by one or more parties of the existence of (or conditions that create opportunities for) conflict.

perceived organizational support (POS) The degree to which employees believe an organization values their contribution and cares about their well-being.

perception A process by which individuals organize and interpret their sensory impressions to give meaning to their environment.

personality The total number of ways in which an individual reacts to and interacts with the world around them.

personality–job fit theory A theory that identifies six personality types and proposes that the fit between personality type and occupational environment determines satisfaction and turnover.

personality traits Enduring characteristics that describe an individual's behavior.

person–organization fit A theory that people are attracted to and selected by organizations that match their values and leave when there is no compatibility.

physical abilities The capacity to do tasks that demand stamina, dexterity, strength, and similar characteristics.

piece-rate pay plan A pay plan in which workers are paid a fixed sum for each unit of production completed.

planned change Change activities that are proactive, intentional, and goal-oriented.

planning A process that includes defining goals, establishing strategy, and developing plans to coordinate activities.

political behavior Activities that are not required as part of a person's formal role in the organization but that influence, or attempt to influence, the distribution of advantages and disadvantages within the organization.

political skill The ability to influence others so that one's objectives are attained.

position power The degree of influence derived from one's formal structural position in the organization. This includes the power to hire, fire, discipline, promote, and give salary increases.

positive affect An affective dimension that consists of specific positive emotions such as excitement, enthusiasm, and elation at the high end.

positive diversity climate In an organization, an environment of inclusiveness and an acceptance of diversity.

positive organizational culture A culture that emphasizes building on employee strengths, rewards more than punishes, and emphasizes individual vitality and growth.

positive organizational scholarship An area of OB research that studies how organizations develop human strengths, foster vitality, build resilience, and unlock potential.

positivity offset The tendency of most individuals to experience a mildly positive mood at zero input (when nothing in particular is going on).

power The capacity, discretion, and means to enforce one's will over others.

power distance The degree to which people in a country accept that power in institutions and organizations is distributed unequally.

prearrival stage The period of learning in the socialization process that occurs before a new employee joins the organization.

prejudice An attitude representing broad, generalized feelings toward a group or its members that maintains the hierarchy between that group and other groups.

presenteeism The act of working while ill or injured.

prevention focus A self-regulation strategy that involves striving for goals by fulfilling duties and obligations and avoiding failure.

proactive personality People who identify opportunities, show initiative, take action, and persevere until meaningful change occurs.

problem A discrepancy between the current state and some desired state.

problem formulation The stage of creative behavior that involves identifying a problem or opportunity requiring a solution that is yet unknown.

problem-solving team A team of employees from the same department who meet for a few hours each week to discuss ways of improving quality, efficiency, and the work environment.

procedural justice The perceived fairness of the process used to determine the distribution of rewards.

process conflict Conflict over how work gets done.

process consultation A meeting in which a consultant assists a client in understanding process events with which they must deal and identifying processes that need improvement.

processes Actions that individuals, groups, and organizations engage in as a result of inputs and that lead to certain outcomes.

productivity The combination of the effectiveness and efficiency of an organization.

profit-sharing plan An organization-wide program that distributes compensation based on some established formula designed around a company's profitability.

promotion focus A self-regulation strategy that involves striving for goals through advancement and accomplishment.

psychological contract An unwritten agreement between employees and employers that establishes mutual expectations.

psychological empowerment Employees' belief in the degree to which they affect their work environment, competence, meaningfulness of their job, and autonomy in their work.

psychology The science that seeks to measure, explain, and sometimes change the behavior of humans and other animals.

psychopathy The tendency for a lack of concern for others and a lack of guilt or remorse when actions cause harm.

punctuated-equilibrium model A set of phases that temporary groups go through that involves transitions between inertia and activity.

randomness error The tendency of individuals to believe that they can predict the outcome of random events.

rational A style of decision making characterized by making consistent, value-maximizing choices within specified constraints.

rational decision-making model A decision-making model that describes how individuals should behave to maximize some outcome.

realistic job previews A job tryout given to demonstrate to job seekers what they would be doing on the job if they were hired.

reference groups Important groups to which individuals belong or hope to belong. People are motivated to conform to and adopt the norms of these groups.

referent power Influence based on identification with a person who has desirable resources or personal traits.

referral hiring When a hiring manager decides to hire a job-seeker based on their own previous experiences with that individual, or a recommendation from a referrer (e.g., a previous coworker).

reflexivity A team characteristic of reflecting on and adjusting the master plan when necessary.

reinforcement theory A theory suggesting that behavior is a function of its consequences.

relational job design Constructing jobs so employees see the positive difference they can make in the lives of others directly through their work.

relationship conflict Conflict based on interpersonal relationships.

representative participation A system in which workers participate in organizational decision making through a small group of representative employees.

resilience Resistance to the adverse effects of stress and strain.

resources Factors within an individual's control that can be expended toward fulfilling desires, attaining goals, or meeting task demands.

restraining forces Forces that hinder movement from the existing equilibrium.

reward power Power based on the ability to distribute rewards that others view as valuable.

risk aversion The tendency to prefer a sure gain of a moderate amount over a riskier outcome, even if the riskier outcome might have a higher expected payoff.

rituals Repetitive sequences of activities that express and reinforce the key values of the organization, which goals are most important, which people are important, and which are expendable.

role A set of expected behavior patterns attributed to someone occupying a given position in a social unit.

role conflict A situation in which an individual is confronted by divergent role expectations.

role expectations How others believe a person should act in a given situation.

role perception An individual's view of how to act in a given situation.

selective perception The tendency to choose to interpret what one sees based on one's interests, background, experience, and attitudes.

self-concordance The degree to which people's reasons for pursuing goals are consistent with their interests and core values.

self-determination theory A meta-theory of motivation at work that is concerned with autonomy, intrinsic motivation, extrinsic motivation, and the satisfaction of psychological work needs.

self-efficacy An individual's belief of being capable of performing a task.

self-fulfilling prophecy A situation in which an individual's behavior is determined by others' expectations, even if untrue. In other words, if someone holds misrepresented or unfounded expectations about another person, that person may make these hypothetical, unfounded expectations into a reality.

self-managed work team A team of employees who autonomously implement solutions and take responsibility for the outcomes of the solutions (responsibilities normally adopted by supervisors).

self-monitoring A personality trait that measures an individual's ability to adjust their behavior to external, situational factors.

self-serving bias The tendency for individuals to attribute their own successes to internal factors and put the blame for failures on external factors.

servant leadership A leadership style marked by going beyond the leader's own self-interest and instead focusing on opportunities to help followers grow and develop.

sexual harassment Any unwanted activity of a sexual nature that affects an individual's employment and creates a hostile work environment.

sexual orientation People's patterns of enduring physical, emotional, and/or romantic attraction toward others.

shared leadership theory A theory that suggests leadership can become an emergent state in which leadership roles are distributed across followers, and all are capable of influencing one another.

short-term orientation A national culture attribute that emphasizes the past, honors traditions, and upholds their image.

silence Discretionary withholding of suggestions, concerns, or opinions about work-related issues to persons who might be able to take appropriate action.

simple structure An organizational structure characterized by a low degree of departmentalization, wide spans of control, authority centralized in a single person, and little formalization.

situation strength theory A theory indicating that the way personality translates into behavior depends on the strength of the situation.

situational judgment tests Substantive selection tests that ask applicants how they would perform in a variety of job situations; the answers are then compared to the answers of high-performing employees.

situational leadership theory (SLT) A contingency theory that suggests the appropriate leadership style depends on followers' readiness (e.g., commitment and competence) to accomplish a specific task.

skill variety The degree to which a job requires a variety of activities using different skills or talents.

social categorization A process through which people make sense of others by constructing social categories, or groups sharing similar characteristics.

social dominance theory The theory that prejudice and discrimination are based on a complex hierarchy, with one group dominating over another and the dominating group enjoying privilege not afforded to the subordinate group.

social identity theory Perspective that considers when and why individuals consider themselves members of groups.

social-learning theory The view that we can learn through both observation and direct experience.

social loafing The tendency for individuals to expend less effort when working collectively than when working individually.

social psychology An area of psychology that blends concepts from psychology and sociology to focus on the influence of people on one another.

socialization A process that enables new employees to acquire the social knowledge and necessary skills in order to adapt to the organization's culture.

sociology The study of people in relation to their social environment or culture.

span of control The number of subordinates that a manager can direct efficiently and effectively.

status A socially defined position or rank given to groups or group members by others.

status characteristics theory A theory stating that differences in status characteristics create status hierarchies within groups.

stereotype threat The degree to which we are concerned with being judged by or treated negatively based on a certain stereotype.

stereotyping Judging someone based on one's perception of the group to which that person belongs.

stigma Attributes that cannot be readily seen, are concealable, and convey an identity that is devalued in certain social contexts.

strain The psychological, physiological, and behavioral consequences of stress.

stress A generally unpleasant perception and appraisal of stressors.

stressor Conditions or events that an individual perceives as challenging or threatening.

strong culture A culture in which the core values are intensely held and widely shared.

structured interviews Planned interviews designed to gather job-related information.

subcultures Minicultures within an organization, typically defined by department designations or geographical separation.

substantive selection Methods used to determine the most qualified applicants from among those who meet the basic qualifications.

substitutes Attributes, such as experience and training, that can replace the need for a leader's support or ability to create structure.

surface acting Hiding one's feelings and forgoing emotional expressions in response to display rules.

surface-level diversity Differences in easily perceived characteristics, such as gender, race, ethnicity, or age, that do not necessarily reflect the ways people think or feel but that may activate certain stereotypes.

sustainability Maintaining practices over a long period of time because the tools or structures that support them are not damaged by the processes.

synchronous communication Communication episodes in which both the sender(s) and receiver(s) are present, aware, and focused on the communication exchange.

system justification theory The theory that group members often accept, rationalize, legitimate, or justify their experiences with inequality, prejudice, or discrimination.

systematic study Looking at relationships, attempting to attribute causes and effects, and drawing conclusions based on scientific evidence.

task conflict Conflict over content and goals of the work.

task identity The degree to which a job requires completion of a whole and identifiable piece of work.

task significance The degree to which a job has a substantial impact on the lives or work of other people.

task structure The degree to which job assignments are regimented or structured.

team building High interaction among team members to increase trust and openness.

team efficacy A team's collective belief that they can succeed at their tasks.

team identity A team member's affinity for and sense of belongingness to their team.

team performance The quantity and quality of a group's work output.

team structure An organizational structure that replaces departments with empowered teams, and that eliminates most horizontal boundaries and external barriers between customers and suppliers.

technical skills The ability to apply specialized knowledge or expertise.

technology The way in which an organization transfers its inputs into outputs.

telecommuting Working from home, or anywhere else the employee chooses that is outside the physical workplace.

terminal values Desirable end-states of existence; the goals a person would like to achieve during their lifetime.

tokenism When management makes only a perfunctory effort to enhance representation to make it seem like the company values diversity.

trait activation theory (TAT) A theory that predicts that some situations, events, or interventions "activate" a trait more than others.

trait theories of leadership Theories that consider personal qualities and characteristics that differentiate leaders from nonleaders.

transactional leaders Leaders who guide or motivate their followers in the direction of established goals by clarifying role and task requirements, allocating rewards and punishment where needed, and (passively or actively) intervening when the situation calls for it.

transfer of training Utilizing the knowledge, skills, and abilities learned from training on the job.

transformational leaders Leaders who inspire, act as role models, and intellectually stimulate, develop, or mentor their followers, thus having a profound and extraordinary effect on them.

trust A psychological state of mutual positive expectations between people who both depend on each other and are genuinely concerned for each other's welfare.

trust propensity How likely an employee is to trust a leader.

two-factor theory A theory that relates intrinsic factors to job satisfaction and associates extrinsic factors with dissatisfaction. Also called motivation-hygiene theory.

(un)ethical behavior Any actions that violate widely accepted moral norms. Conversely, ethical behaviors are any actions that meet or exceed widely accepted moral norms.

(Un)ethical leadership The idea that leaders serve as ethical role models to followers and thus demonstrate appropriate (or inappropriate) behavior by using their power in (un)ethical ways and/or by treating others fairly (or unfairly).

uncertainty avoidance A national culture attribute that describes the extent to which a society feels threatened by uncertain and ambiguous situations and tries to avoid them.

unity of command The idea that a subordinate should have only one superior to whom they are directly responsible.

unstructured interviews Short, casual interviews made up of improvised questions.

utilitarianism An ethical perspective in which decisions are made to provide the greatest good for all.

value system A hierarchy based on a ranking of an individual's values in terms of their intensity.

values Basic convictions that some actions and outcomes are more morally, socially, or personally preferable than others.

variable-pay program A pay plan that bases a portion or all of an employee's pay on some individual and/or organizational measure of performance.

virtual structure A small, core organization that outsources major business functions.

virtual team A team of employees that uses technology to tie together physically dispersed members in order to achieve a common goal.

vision A long-term strategy for attaining a goal or goals.

vision statement A formal articulation of an organization's vision or mission.

voice Discretionary communication of suggestions, concerns, or opinions about work-related issues to persons who might be able to take appropriate action.

wellness programs Organizationally supported programs that focus on the employees' total physical and mental health.

whistle-blowers Individuals who report unethical practices by their employer to outsiders.

withdrawal behavior The set of actions employees take to separate themselves from the organization.

work-life spillover When psychological responses to one domain (e.g., positive or negative moods) are carried over into another domain and impact it in some way.

workaholism A maladaptive mental state characterized by feeling compelled to work due to internal pressures, thinking about work even when not working, and going above and beyond what is reasonably expected (to one's own detriment).

worker An individual who contributes to the accomplishment of work goals.

work group A group that interacts primarily to share information and make decisions to help each group member perform within their respective area of responsibility.

work sample tests Hands-on simulations of part or all of the work that applicants for routine jobs must perform.

work specialization The degree to which tasks in an organization are subdivided into separate jobs.

work team A group whose individual efforts result in performance that is greater than the sum of the individual inputs.

workforce diversity The heterogenous characteristics of organizations, work groups, and teams that recognize their workers vary in gender, age, race, ethnicity, sexual orientation, and other characteristics.

workforce inclusion The act of creating and maintaining workplaces that support and leverage the diversity of their members.

workplace spirituality The recognition that people have an inner life that nourishes and is nourished by meaningful work that takes place in the context of community.

zero-sum approach An approach to reward allocation that treats the reward "pie" as fixed so that any gains by one individual are at the expense of another.

Endnotes

Chapter 1

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Chapter 2

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Chapter 3

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Chapter 4

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Chapter 5

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Chapter 6

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Chapter 7

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Chapter 8

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Chapter 9

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Chapter 10

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Chapter 11

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Chapter 12

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Chapter 13

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Chapter 14

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Chapter 15

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Chapter 16

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Chapter 17

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Chapter 18

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