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The shadow side of positive organizational change: practitioners' experience navigating dialectical tensions in appreciative inquiry
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CHAPTER 5: THE LEADERSHIP SHADOW

5.1 Introduction

In the previous chapter, the voice shadow identified the tension of free expression-limited expression. This chapter's leadership shadow introduces a second dialectical tension of hierarchical-collaborative leadership. The dialectical framing of hierarchical-collaborative leadership tension contributes to AI scholarship, allowing us to view leadership assumptions differently. The tension manifests when assumptions about hierarchical leadership bump against assumptions about collaborative leadership in the context of a shared leadership methodology such as AI. Rather than consider hierarchical and collaborative leadership as a binary choice, a dialectical perspective allows us to see interdependencies and possibilities. Hierarchical leadership can support collaborative leadership by allocating resources and sponsorship and limiting shared leadership by defaulting to hierarchical routines. When opportunities for shared leadership are ignored or usurped, the leadership shadow becomes the repository for untapped strengths, such as leadership agility to move back and forth between hierarchical and collaborative decision-making processes. This chapter begins with Cecily's story of using AI to facilitate culture change in an academic institution. Cecily's narrative illustrates practitioners' experiences of hierarchical-collaborative leadership dialectic associated with AI in organizational change efforts. While Cecily's story anchors the analysis, examples drawn from various study participants establish this tension's ubiquitous among AI practitioners. The chapter proceeds with an explication of findings identifying competing assumptions about hierarchical and collaborative leadership relative to decision-making that became evident during the change process. Next, theoretical implications of the tension are discussed, including the sequential stages of the AI process in which tension surfaces and the demand for leadership agility. The

chapter discusses practical strategies practitioners use to navigate tension, including tools to support shared decision-making and coaching to strengthen leadership agility.

Cecily has facilitated hundreds of AI culture change interventions in six countries. She has worked in various settings, including academia, information technology, manufacturing, and community-based organizations. Cecily led an academic institution's three-year culture change initiative. The institution had done some initial work with a firm specializing in Appreciative Inquiry and was interested in more in-depth AI training to promote collaboration and engagement. For nearly three years, Cecily worked with organizational members to transform a culture she described as “very command and control.” Cecily’s AI process included framing the work around core values, engaging organizational members in inquiry, creating shared images of the future, and cycles of action and reflection. Cecily’s experiences identified hierarchical-collaborative leadership tensions that emerged as the AI processes unfolded.

I think when the President learned about Appreciative Inquiry because, he got so excited about it, I think what got him excited was it was going to make everything feel positive. And didn't really...did not really get the whole process. So, the first year was a couple of trainings for the whole systems office and one for management and one for staff, and I don't know why they did that. I tried to get them not to, but they wanted them separate...The senior leaders were not part of that and senior leaders didn't have any interest in being part of that...There were a lot of people at mid-level management and below totally got it, loved it, saw the value...I kept hearing over and over from people, 'Yeah, this is great, we love it, but it's not getting done from the top down.'

So, I worked with the Senior Leadership Team for a year, and they did everything possible to deflect from their own work...instead of learning it themselves...They were very command and control...they were worried politically about things...there was one particular person who kind of handled the President and gave him information that he wanted to hear and not all the information. I think part of what happens in community colleges is there's this political thing that you don't want to air any dirty laundry. And so...you know what surfaced? We did the values assessment with them as well because it felt like that was the only way, especially the President, was going to see the dysfunction in the organization...and you know, he looked at it and he was like, “I guess we can't hide from it anymore. There it is in black and white.” So, he obviously knew, he

knew it was there, even though his handler was saying, 'No, it was fine. It's not a problem.'

And then we did slices by division and even senior leadership got that collaboration and engagement were important. I really think it was a combination of two things: one, this is the way I've always led, and I have been successful, and I'm close to retirement, so why should I change? And I think the other piece was a deep fear of if I say I don't know how to do something or I ask other people how to do it, they are going to suggest something that might not be a good thing for the college—we know better. Because we have greater input and access, and yet, when they got feedback and input from other people...they could see that people gave great suggestions, that it wasn't out of alignment with where they wanted to go. When we did some further inquiry with staff, they had some great ideas for how to bring the desired cultural values to change those things that were most dysfunctional. And there were a couple of senior leaders that were, "This is not appreciative. We're focusing on the dysfunction." And they just got angry. And, I'm like, 'Appreciative Inquiry is not about just focusing on the positive...it's about how you deal with the dysfunction.' The Finance guy actually said, 'I'm not engaging my people...' he flat-out said that.

5.2 Hierarchical-Collaborative Leadership Tension Underlies the Leadership Shadow

Cecily's experience illustrates the hierarchical-collaborative leadership tension underlying the voice shadow. Dialectical tension theory has taught us about the dynamic interplay between opposing but interdependent forces, such as hierarchical leadership and collaborative leadership, that can exist simultaneously (Baxter & Montgomery, 1997). In literature, the term collaborative leadership is often used interchangeably with shared leadership, as Kramer and Crespy (2011) noted. Collaborative leadership is "relinquishing control to the performers so that power is redefined with less of a traditional hierarchy" (Kramer & Crespy, 2011, p.1025). Pearce and Conger (2003) defined shared leadership as "a dynamic, interactive influence process among individuals in groups for which the objective is to lead one another to the achievement of group or organizational goals or both" (p.1). Assumptions about collaborative leadership include formal leaders motivating others to act versus giving directives (Bennis, 1999;

Kramer & Crespy, 2011). Also, shared leadership assumes that power differences are minimized through dialogue and group empowerment to make decisions (Kramer & Crespy, 2011; Fletcher & Kaufer, 2003; Little & Little, 2006). Further, a condition for collaborative leadership success is that the traditional hierarchy is prepared to let go of control (Kramer & Krespy, 2011; Herrington, 2000; Zander & Zander, 2000). Scholars argue that one of the benefits of collaborative leadership for individuals and organizations is the generation of novel ideas for a more inclusive level of employee engagement (Hsieh & Liou, 2018; Kramer & Krespy, 2011; Raelin, 2016).

The centrality of interactions between people goes to the heart of AI methodology and principles. AI has been described as a process that facilitates the integration of shared goals with shared activities and relationships (Fitzgerald et al., 2010), which fits within the paradigm of collaborative leadership. AI's principles also align with a perspective focused on leadership practice. For example, the constructionist principle assumes that reality is socially created through language and conversation; the anticipatory principle assumes that a positive image inspires positive action through an inquiry about "what should be?" or "what might be?" The enactment principle assumes participants act in ways that align with the desired change (Whitney & Trosten-Bloom, 2003). The wholeness principle assumes that bringing all stakeholders together facilitates the sharing of diverse perspectives. The principles underlying the AI ethic infer that organizational members have the power to practice leadership in a way that affects change through dialogue, inquiry, and shared visioning activities.

The theoretical assumptions about hierarchical-collaborative leadership set the stage for tension in AI. Scholarship has described hierarchical leadership as a form of leadership practice that assigns different levels of responsibility and accountability according to position and rank in

an organization (Yukl, 1989). The hierarchical leadership model as a pyramid illustrates leaders at the top of the pyramid setting strategic directions, formulating policy, making structural modifications, and initiating new ways of working (Yukl, 1989). Lower on the pyramid, managers interpret and implement policy and operate within the boundaries established by leaders at the top (Yukl, 1989; Katz & Kahn, 1978). Assumptions about hierarchical leadership are firmly rooted in Max Weber's theory of bureaucracy (1947). Weber argued that hierarchical levels of authority enabled organizations to function rationally and orderly. Characteristics of hierarchical, bureaucratic leadership included honoring the chain of command authority, specialization, and division of labor, detailed job descriptions, rules and procedures, and formal communication.

Hierarchical-collaborative leadership tension has theoretical implications for decisions made in positive organizational change initiatives. Through a hierarchical-collaborative leadership lens, AI represented an opportunity for leaders and others to make joint decisions in the discovery, dream, design, and delivery stages. However, leaders could default to hierarchical practices if unprepared to make joint, collaborative decisions. Joint decision-making is one of five decision processes typically available to leaders. Vroom and Yetton (1973) outlined five different types of decisions available to leaders, including two variations of autocratic decisions, two consultative decisions, and one of collaborative decisions. Autocratic processes include A1 and A2 decisions. A1 decisions involve the leader making decisions alone based on available information. In A2 decisions, the leader obtains information from a subordinate, either openly or covertly, before making the decision alone. Consultative decisions include C1 and C2. C1 describes a consultative decision in which the leader shares the problem separately with a few relevant subordinates, considers whether to use the input, and then decides alone. In C2

decisions, the leader brings a group of subordinates together to solicit their collective ideas and suggestions, which may or may not be considered, before making the decision alone. The collaborative decision process includes G2 decisions. In G2 decisions, the leader shared the problem with subordinates as a group; the leader and the group then worked toward consensus, and the leader accepted the solution that supported the entire group. Understanding the five decision processes adds context to understanding hierarchical-collaborative leadership tension.

Drawing on hierarchical and collaborative leadership attributes, I unpack Cecily's narrative identifying experiences of tension in AI organizational change initiatives. As hierarchical and collaborative leadership practices competed for attention, the neglected pole generated the leadership shadow (Fitzgerald et al., 2010; Kolodziejski, 2004). Scholars have studied the shadow as a repository of attributes an organization has refused to acknowledge, including negative qualities and untapped strengths (Fitzgerald et al., 2010; Kolodziejski, 2004; Bowles, 1991; Jung, 1968). In Cecily's example, tension manifested as hierarchical leadership would sometimes support collaborative leadership processes and, at other times, act in ways that seemed to usurp collaborative leadership processes. Cecily described how she rolled out AI training and seminars for management and staff at the community college.

So, the first year was a couple of trainings for the whole systems office and one for management and one for staff, and I don't know why they did that...I tried to get them not to but they wanted them separate.... The senior leaders were not part of that, and senior leaders didn't have any interest in being part of that... I was never really able to get them to sit down, and I tried in the very beginning—two days offsite, where it's, 'No, we don't have the time for that.'

Cecily had the support of hierarchical leadership to deliver the AI training that would prepare the organization to engage in collaborative leadership culture change efforts. However, the senior leaders' decision to conduct separate training sessions for management and staff seemed to align with hierarchical leadership practices of preserving the hierarchy of authority and maintaining a

division of labor. AI's constructionist principle has advocated for shared conversations that enable the letting go of assumptions that constrain imagination. In this case, the organization missed an opportunity to support collaborative leadership by learning and talking about AI together.

In 26 exemplars, I identified what I describe as the tension of hierarchical-collaborative leadership, which helps to unpack assumptions about the leadership shadow and the two types of leadership. For example, the design of AI summits promoted collaborative leadership, which bumped up against bureaucratic, top-down leadership. As noted in AI literature, the summit methodology was intended to represent a "radical shift away from traditional change management approaches that puts the responsibility for change in the hands of just a few individuals" (Ludema et al., 2003, p. 13). The narratives of study participants indicated the emergence of leadership tension during AI summits. Melanie, an AI practitioner with eight years of experience working in her home country, facilitated a two-day summit for 60 members. The attendees represented 12 geographic areas. Melanie said the summit aimed to "look at how they could communicate, collaborate, and support each other across very different systems." During the summit, attendees identified initiatives, projects, programs, and innovations to meet the diversity of constituents. Melanie noted that the attendees were "jazzed about what things they actually designed and how they were going to keep that going." Melanie said the work initiated over the two-day summit was to continue post-summit. She also noted that momentum was lost when participants returned to their respective states, and the next steps hinged on hierarchical leadership action. Melanie stated that she had prepared summary reports from the event and sent the reports to her internal contact person before the 30-day deadline. However, six weeks following the event, Melanie received a call from one of the state representatives asking when

the report would go out. Melanie reflected, “I’m sure at that Federal level, there are complexities to it. It’s one of those things.” A transition in leadership also occurred, as noted by Melanie:

One of the things that I think contributed to not as much post-momentum was they knew it, but I didn’t know. The head of...for this region was moving into another region, and this other woman, who was like number two or three, was coming into her place, and she was not on the core planning team....and she hadn’t been part of all the conversations that lead up to the use of Appreciative Inquiry that led to these particular focus areas for the summit....and she is the one that would make sure there is monies and time available.

In an AI summit, all organization levels are simultaneously in the room. When the summit ended, a bureaucratic, chain-of-command communication process kicked in. Although the AI summit had generated enthusiasm, a change in leadership slowed momentum. Unlike her predecessor, the new leader had not received an AI orientation, which could have potential funding implications for continuing AI design and delivery steps. The loss of momentum following the summit illustrated how collaborative processes could often run up against hierarchical leadership routines, such as chain of command communication and bureaucratic structures involved in resource allocation.

The experiences of other study participants deepen our understanding of instances when collaborative leadership initiatives in AI have clashed with hierarchical leadership. An AI summit for an academic institution was the setting. Karima, an AI practitioner since 2008, has led AI initiatives in three countries. Karima used AI with an academic institution to foster collaborative leadership in the strategic planning process. The college had twice failed at strategic planning before turning to AI. Karima described how faculty, deans, students, graduates, and employees were invited to participate in an AI summit. The leadership provided funding for the event and supported follow-up sessions, bringing people back to solicit their input on the strategic plan. Karima described the positive effect of the process:

The process made the planning process more transparent, and people did feel that they were involved and understood how the plan had been created. And this sort of groundswell of positive conversations, and positive stories, and exceptional positive moments...you could feel a change.

In this case, the AI process modeled the attributes of collaborative leadership. Participants from different hierarchical levels were involved in shared dialogue to co-create positive change.

Karima described a slowdown in momentum following the summit. Karima explained that during the design phase of the summit, the participants had identified initiatives. Karima noted:

I think that what slowed us down was when the new Vice President of Academics came because a lot of the initiatives needed to be prioritized and led by him...and we worked really hard at it, and at one point, I remember meeting with him...we just weren't coming to terms with things. So, you know, it was a good two years of continuing to move it along.

This situation highlighted competing assumptions about collaborative and hierarchical leadership. The AI summit employed a joint decision process to identify initiatives for action. Conversely, the Vice-President appeared to employ a C2, consultative decision process, bringing participants together to provide input. Still, the leader was not obligated to follow through on their ideas before deciding alone (Vroom-Yetton, 1973). The practitioner assumed joint decision-making processes in which they would "come to terms." The Vice-President was responsible for leading and prioritizing initiatives and may have held different assumptions about decisions in the context of an AI initiative.

The narratives of study participants, like Juanita, continued to illuminate how competing assumptions about hierarchical-collaborative leadership generated tension in AI. Juanita has practiced AI for more than 20 years in three countries. Juanita facilitated an AI summit for a team she said desperately needed help. According to the team leader, the team was falling apart. During the summit, Juanita described the team dynamics: "This is a group of people who have no voice, who have been marginalized, and all of a sudden, the leader is sitting back and

listening to them for the first time, and they are just stepping up.” Juanita checked in with the team monthly and made this observation:

A month later, we check-in, and the task forces are going strong; people are excited, things are happening, everybody’s happy. Month two, things are still going strong and then we’re going to have this big meeting month three to come back together again and talk about where we are and how to go forward and stuff. So, we’re at month three at the meeting, I come in, the leader goes to the front of the room and says, ‘alright, all this has to stop. This is just out of control.... you’ve got this going on, this going on...I don’t know what’s going on,’ ...and he just killed everything.

Over a three-month time period, team members stepped up to take active roles in moving tasks forward. As the team adapted behaviors consistent with a collaborative leadership approach to change, bureaucratic assumptions about hierarchical leadership surfaced. The leader’s decision to “kill everything” was consistent with autocratic or consultative decision-making that granted the hierarchical leader the final say.

Hierarchical-collaborative leadership tension, identified in the experiences of study participants, gave us further insight into the leadership shadow. For example, Cassie, a practitioner with over 20 years of experience working with various organizations, including Fortune 500 companies, used AI to help a power plant develop a performance excellence plan. The plant had a 3-month window to replace the main generator. The generator replacement would mean the plant would have to undergo an outage. The plant had experienced problems with the previous outage, so there was pressure to get this one right. The AI agenda was “outage excellence.” Cassie described her process of engaging organizational members in the initiative:

We put together what I call an AI learning team...and they were from all aspects of the plant...we were seeing just leaps and bounds of ideas... Before we were even done with the interview process, the data was starting to emerge with themes of low-hanging fruit that we could do stuff with right away.

Instead of a top-down approach to managing the retrofit process, AI’s collaborative leadership approach to change catalyzed practical ideas from organizational members across the plant.

However, things changed when a new plant manager entered the scene. Cassie described her experience of meeting the manager for the first time:

About halfway through the process...they hired a new plant manager. He comes in, having never touched this process, heard of this process, thought of this process, and went, 'What in the hell are you doing...taking 26 of my people, two hours every couple of weeks? I can't have this.'

The clash of decision styles (autocratic versus joint) exposed the leadership shadow. The plant manager came into the process without having the same grounding in AI as the rest of the team. The pressure was high to get the retrofit right. From a hierarchical leadership perspective, taking people off production to participate in an AI planning team may have seemed counterintuitive to the task at hand. From a collaborative leadership vantage point, pulling 26 people out of production for two hours every couple of weeks had facilitated "leaps and bounds of ideas."

This section identified the experiences of dialectical tension associated with AI in organizational change efforts and established the assumptions about the tension that became evident during the change process. I identified how enacting AI processes can trigger hierarchical-collaborative leadership tension—a tension not previously studied in AI. A dialectical tension is two opposing but interdependent forces existing simultaneously. AI's theoretical assumptions about collaborative leadership bumped against assumptions about traditional, top-down leadership. Neglecting one pole of tension generated the leadership shadow.

5.3 Implications of the Leadership Dialectic

In this section, I discuss several implications the leadership dialectic had on the process and how leaders and AI facilitators managed it. In particular, findings indicate that a) the context

in which the tension arose happened during the sequence of AI stages, b) data indicate that hierarchical leadership was the default setting utilized by organizational leaders when the dialectic presented itself, and c) that one effect on the process was a demand for leadership agility. Leadership agility manifested in reframing by leaders and was encouraged by the specific practices utilized in the face of the dialectic.

5.3.1 Discovery, Design, and Delivery Stages Surfaced Tension

Analysis showed that the context in which hierarchical-collaborative leadership tension surfaced was in three of the four critical stages of the AI process: discovery, design, and delivery. The tension was rooted in autocratic or consultative decisions made by leaders that veered away from collaboration. Interestingly, participant data did not point to tension in the dream stages of AI. According to AI practices (Ludema et al., 2003), the dream stage of AI is intended to build excitement for change as participants imagine what they want for the organization, share their dreams with others, build upon one another's dreams and create collective dream statements (Ludema et al. 2003). One possibility for the absence of hierarchical-collaborative leadership tension at the dream stage was that dream statements are constructed and shared without a push for a group decision. Jasmine, a practitioner with 20 years of experience, has used AI with various organizations in seven countries. Jasmine described her observations of an AI summit with school board representatives as they worked through contentious issues around fiscal accountability. Jasmine reflected, "In the dream, hands down, the room came alive...that's when the love affair flourished...they realized that they could actually be hopeful at a time that was otherwise dark." AI practitioners consider the dream stage the imaginative part of the summit that builds excitement for change (Ludema et al., 2003).

In six of the 26 exemplars, tension surfaced at the discovery stage when senior leaders decided to let others engage in the process without them. The discovery stage included a context setting, an orientation to AI, and participant interviews with each other to identify core organizational strengths (Ludema et al., 2003). The discovery phase introduces participants to reframing problems into possibilities for action. The data pointed to an absence of leaders in the discovery stage of AI as a source of complaints of change not happening from the top down. In one example, Renata, a practitioner who has facilitated more than 100 AI interventions in three countries over ten years, told how senior leaders were absent at the discovery stage of an academic institution's strategic planning process. Renata talked about the absence and said, "It would have been quite powerful if we had had the executive participation around the tables as a way to achieve shared understanding of the context. It's very human nature for people to fill in their own narratives." Returning to Cecily's narrative, she noted that as staff and mid-level managers learned about and began practicing AI, the senior leadership team "did everything possible to deflect from their own work...instead of learning it themselves." According to Cecily, organizational complained, "this is great, we love it, but it's not getting done from the top."

Similarly, Sonita's experience of facilitating an AI culture change initiative to foster cohesion within a non-governmental organization surfaced tension when leaders made an autocratic decision not to participate in the AI orientation. Sonita stated that the leadership team "wanted me to change the staff. They wanted me to offer them programs and training and then to sort of follow along with them and to see all that change." Sonita said the leaders excluded themselves from the process and told her, "Our problems are so deeply ingrained...a little AI isn't going to help us." According to Sonita, the staff and mid-level managers said, "We can't

actually do this until the senior management changes.” Sonita noted that some mid-level managers were “so embittered and feeling very badly treated by senior management and felt very jerked around. And so, they wouldn’t really engage.” Sonita explained that many of the mid-level leaders decided to leave the organization, saying things like, “I can’t believe that they would first of all spend all of this money to bring somebody in and have us spend all of this time, and we’re having good results, and they’re not supporting it.”

Hierarchical-collaborative tension surfaced in 10 out of 26 exemplars at the design stage of AI when leaders made decisions that cut out others from imagining, planning, and implementing provocative designs. The design phase bridges the discovery of the positive core and the dream of what the organization could be (Ludema et al., 2003). The purpose of the design stage was for participants to co-construct their ideal future by writing a set of provocative propositions about the social architecture that would facilitate change—meaning systems, structures, strategies, processes, and procedures (Ludema et al., 2003). Design was also the stage where participants committed to organizing work, collaborating across divisional boundaries, and planning and implementing work assignments. (Ludema et al., 2003). The design stage typically happened during the summit but, at times, could continue beyond the summit. The experiences of study participants identified tension at the design stage when leaders made autocratic decisions that circumvented collaborative decision processes. Thomas, a practitioner with 20 years of experience, has led over 100 AI interventions in four countries. Thomas conducted an AI summit designed to produce draft plans to address feedback from an employee survey. Immediately following the summit, Thomas observed that the senior leaders were planning to continue working on the provocative propositions without input from organizational members. Thomas recalled giving this feedback to the leaders: “This is a plan that all of you

were a part of creating...and there's going to be implications of shifting the framework, and you're going to need to bring them back together just to talk about why." The leadership team made the autocratic decision to carry on with their design plan without organizational input. Thomas decided to bow out of his work with the organization.

Another practitioner's experience further illustrated an experience of tension at the design stage of AI. In her 16 years of experience, Carla has led over 100 AI initiatives in three countries. She facilitated an AI summit for a hospital undergoing a massive leadership restructuring. Carla described the situation as a "hot mess." According to Carla, the hospital replaced the executive team and the board. The hospital needed to develop a strategy to rebuild its trauma center and chose the AI process to solicit input from various stakeholders. The AI process engaged 3,200 people in 42 discovery sessions. Participants included diverse stakeholders, special interest groups, physicians, and academicians.

Carla noted people sitting and talking to someone who was their arch-nemesis. According to Carla, "They had the most amazing experiences...It was the best thing that happened to that hospital during their transition. Because they were demonstrating listening." But at the design stage of the process, Carla stated the CEO had a plan for what she had heard from these meetings, so she said, "Forget all of those things; this is how I want it done." By taking over the process, the CEO had veered away from the commitments people had made about how to own the change. Carla noted that trust was damaged in the organization, stating, "You get people excited. You ask them to share their ideas, to be vulnerable...you better use it." The CEO eventually moved on. Carla subsequently worked with a new administrator to re-engage the organization's stakeholders, with what Carla described as an understanding "to be meaningful and not just the lip service that they are suspicious it's going to be anyway."

Tension also surfaced in 10 of 26 exemplars at the delivery stage of AI when leaders made autocratic or consultative decisions rather than joint decisions about the next steps for action. The intended agenda of the delivery stage of AI was to inspire and support positive self-organizing, which could include time, human resources, funding, training, or coaching from senior leadership (Ludema et al., 2003). Sonita recounted her experience leading an 11-day AI summit with a relief organization in one example. The focus of the event was to educate organizational members about sociocracy. Sociocracy is a process that “relies on consent-based decision-making through active self-disclosure and feedback” (Saxena and Jagota, 2016, p.173). According to Sonita, feedback from the event was highly positive. The next step in the process was for leaders to formalize commitments to operationalize the process across the organization. However, a year after the event, the process was not widely adopted due to a lack of funding. According to Sonita, “The organization was perfectly set up at that time to really take this way of working further. And they just wouldn’t do it.”

In another example, an autocratic decision surfaced tension during the delivery stage of an AI restructuring initiative. The leader made an autocratic decision to return to business as usual without consulting with his team about what they needed from him to operationalize the restructuring. The leader made assumptions about the team’s preparedness to operationalize the plan, but it appeared the team needed additional mentoring from the leader. The managers interpreted the leader’s return to focus on his work as a broken promise to the process and the people involved.

A final example comes from Sienna, a practitioner who has led more than 40 AI interventions in one country over 18 years. Sienna supported an AI initiative with a hospital to improve nurse retention in the delivery stage when an autocratic decision by leaders surfaced the

dialectical tension. The initiative involved 400 nurses and a supportive Chief Nursing Officer (CNO). The nurses and the CNO participated in AI's orientation, discovery, dream, and design phases. The process had progressed to the delivery stage, during which time Sienna reported that the efforts of nurses were yielding results. According to Sienna, the efforts of nurses had reduced nurse turnover by 13%, reduced vacancy rates by 30%, improved nurse rating of the hospital as a desired place to work by 16%, and improved survey results that measured patient satisfaction with nurses by 20 points. Tension surfaced when the hospital was sold, and an autocratic, top-down decision directly affected the nurses. Sienna said, "It was like, we want to hear none of that. All we want to hear is how long did you spend with the patient and how can you do it faster?" As a result of the change, the CNO moved to a different hospital; many of the nurses left or were fired, and the remaining nurses lacked an advocate to help sustain the delivery phase of the nurse retention AI initiative.

The findings in this section contributed to AI and POS literature by identifying the implications of the tension, specifically, the context in which the leadership tension was likely to surface. The data identified tension that arose in AI's sequential process and identified missed opportunities for leaders to mitigate tension at critical stages of positive change. At the discovery stage, tension was likely to surface when leaders were absent from the process. Missed opportunities for leadership development included being a part of a context setting so that organizational members saw that it was "getting done from the top." Also, at the discovery stage, leaders missed the opportunity to gain a solid orientation to AI, which included the skill of reframing problems into possibilities. This skill would be essential for navigating tension throughout the AI process. Tension at the design stage of AI surfaced when leaders made decisions that prevented others from imagining, planning, and implementing provocative designs

for change. The design stage of AI signaled an opportunity for leaders to learn how to encourage organizational members to take ownership of the elements they wanted to change. In the delivery stage, tension surfaced when leaders engaged in decision processes that precluded joint decision-making with organizational members. An opportunity for leadership development was for leaders to learn how to engage in collaborative decision processes. Also, at the delivery stage, there were missed opportunities for leaders to reinforce self-organizing efforts by providing needed resources, mentoring, or advocacy.

5.3.2 Hierarchical Leadership as the Default Setting

Over one-third of exemplars of a hierarchical-collaborative leadership tension in AI, there was a default to hierarchical leadership. Literature has discussed hierarchical leadership as formal authority enacted through legitimate power (French & Raven, 1959; Yukl, 1989). Yukl (1989) defined formal authority as “the perceived right of one position occupant to influence specified aspects of the behavior of other position occupants. The agent has the right to make particular types of requests, and the target person has the duty to obey” (p.15). Yukl describes formal authority as an implicit social contract between leaders and organizational members that allows organizations to function effectively.

The experiences of study participants established formal leaders often reverted to hierarchical leadership as hierarchical-collaborative leadership tension emerged in AI. For example, in Cecily’s culture change work with the community college, the staff prioritized the elevation of values to address organizational dysfunction. However, several senior leaders had different opinions about focusing on the change effort. Cecily noted:

And there were a couple of senior leaders that were, ‘This is not appreciative. We’re focusing on the dysfunction.’ And they just got angry...the Finance guy actually said, ‘I’m not engaging my people...’ he flat out said that.

The leadership shadow emerged when leaders had different assumptions about the strategic focus of AI, which led senior leaders to reject ideas that seemed to veer away from positivity and appreciation. In AI, collaborative leadership efforts can sometimes compete with hierarchical leadership. As illustrated in this case, tension can trigger a default to formal authority routines, where the leader has the right to make a request, and the target person is obligated to obey (Yukl, 1989). In another example, Sonita, a seasoned AI practitioner, was a mentor consultant to a more junior practitioner. Sonita has practiced AI since the late 1990s. The junior practitioner had led an AI summit for an international organization and had called Sonita to debrief the event. In her debrief conversation with the practitioner, Sonita asked about the next steps in the design stage of AI:

And I said, ‘Well, how did you put the teams together for carrying the design work forward?’ And he said, ‘Well, we turned it over to the management team.’ And I said, ‘But those people didn’t get to carry on with the work on the issues.’ And he said, ‘no, we turned it over to the departments....and I said, ‘how do you think it’s going to turn out?’” And he said....’ Oh my God.... we went back to business as usual.’

The phrase “back to business as usual” epitomized leadership falling back into familiar work routines and directing tasks from a hierarchical perch. The decision to take over the design phase of the AI process bumped up against AI’s embedded assumption to promote collaborative leadership. Sonita’s coaching allowed the junior consultant to reflect on his intentions and the impact on the process.

Data showed further examples of when leadership tension triggered a return to the default hierarchical setting. Thomas, a practitioner who has used AI since the late 1990s, held a debrief session with senior leaders to review the design ideas that organizational members generated during a 2-day AI summit. During the debrief, Thomas observed the leadership team’s response to the design output:

I would say that was the point where it went back into the old hierarchical of structure...all of a sudden, there was kind of like that “old shit moment” of we’ve got to take this inside, we’ve got to re-work it. Let’s get the senior leadership team, let’s reorganize the plan like that.

Although the summit had engaged participants in a collaborative process, leadership’s return to native communication steered the process to familiar routines, in which leaders exercised their formal authority to rework the plan. In another similar example, Carla, a practitioner of AI since 2002, experienced hierarchical leadership routines coming up against collaborative leadership initiatives. Carla worked with a medical facility to help rebuild the reputation of their trauma center. Carla had successfully guided the organization through 42 discovery and dream sessions with 3,200 stakeholders, including physicians, special interest groups, and academics. When the AI process shifted to the design stage, there was a pivot to native communication. According to Carla, “The CEO really had a plan for what she’d heard from these meetings, so she said, ‘forget all those things; this is how I want it done.’ A default to hierarchical leadership pre-empted the opportunity for organizational members to co-design the way forward.

Nine out of 26 exemplars showed an organizational tendency to slip back into top-down leadership routines when new leaders entered the scene. Sienna, an AI practitioner since 2001, described her work with a hospital to elevate the nursing profession—the initiative aimed to provide nurses with training and resources to improve working conditions and departmental collaborations. According to Sienna, nurses had developed protocols for interviewing and onboarding nurses, created one-on-one instructions for novice nurses, and implemented mentoring and coaching for nurses. Sienna stated that the hospital was sold during her work with the nurses. Sienna explained how the new president had a different agenda for the organization:

The problem that happened there, it’s a very heavily doctor-run hospital. Nurses really don’t count. Doctors really do. And they hired a new president of the hospital...and he came in, and it became even more about doctors and less about nurses. And if you have

that position and you put all the money and the energy into doctors and not nurses, you struggle.

AI's focus on involving nurses in solving the problem of nurse retention has facilitated the flourishing of collaborative leadership in a bureaucratic organization. Investing in providing nurses with training and resources enabled nurses to enact significant changes before the leadership transition. However, the sale of the hospital and a change in top leadership spiraled the organization back to familiar routines, and resources and energy shifted to the doctors. Sienna would experience a similar situation in a different hospital. In the second hospital, nurses developed education and training programs for nurses and doctors on talking appreciatively to patients. The nurses continued developing training when a new Chief Nursing Officer (CNO) came on board. Speaking about the CNO, Sienna recalled, "She disavowed anything, from the day she came in...and the people that hired me got literally removed to a far out building...they were the people who were educating and developing nurses." Within six months, the people who had hired Sienna had left the organization.

There was further evidence of leaders defaulting to hierarchical practices when new leaders came on board. During Cassie's AI work with the power plant. The 26-member AI team had been conducting discovery interviews when a new plant manager objected to pulling people out of production to engage in the AI process. Cassie noted the culture of the plant as "being regulated to pieces," which hinted at the leadership routines grounded in bureaucracy (Weber, 1947). Although the discovery interviews had generated what Cassie described as "leaps and bounds of ideas," the default setting for the new plant manager was to exercise his formal authority to get people back to work. In another example, a manufacturing firm had used AI summits for several years to foster collaborative leadership up and down the supply chain. Ralph, an internal practitioner who had used AI since 2004, noticed a shift when the organization

brought in two new top executives. Ralph stated, “All the pockets of the organization went back to their old silos of responsibility and metrics of success.” The execution of formal authority returned the organization to more traditional ways of working and away from AI.

For Karima, an academic institution’s AI strategic planning process was in jeopardy when a new leadership team took charge. The AI strategy focused on educational innovation and putting students first. According to Karima, the board had approved the plan, but then there was a leadership change. Karima noted the new leaders did not understand AI’s importance in “keeping it front and center and actually resourcing and executing the strategy.” Karima added, “The college sort of fell back a little bit...I think that can happen in AI...there is a learning process ...particularly the Vice-President of Academics, he was an engineer. He had a difficult time understanding...it wasn’t business as usual.” Reflecting on the situation, Karima said, “This is a strategic plan meant to take us in a different direction. And I think he was so bogged down with operational things.” The new leaders in these scenarios missed the opportunity to understand the value of AI to the organization and organizational members.

Accordingly, these data contribute to AI scholarship by establishing hierarchical leadership as the default setting when tension surfaces in AI. A default setting indicated a return to native communication practices, wherein leaders acted from a position of authority to decide how AI initiatives should be strategically focused and how AI design plans should be framed and executed. Leaders needed to be better prepared to support collaborative leadership efforts, specifically by having a solid grounding in AI, seeking to understand the benefits of collaborative leadership initiatives to the organization and its members, and having a greater self-awareness of how leadership decisions and actions influence the AI agenda and positive organizational change.

5.3.3 The Demand for Leadership Agility

One implication of the tension and its effect on the process is the demonstration of leadership agility. Scholarship on leadership agility includes four key attributes: context setting, stakeholder agility, creative agility, and self-leadership agility (Joiner, Rademakers, Scheepstra, & Stokes., 2019). Context setting enabled leaders to scan the environment, anticipate change, and assess what needs to happen to achieve desired outcomes. Stakeholder agility enabled leaders to appreciate stakeholders' views and perspectives and to work toward alignment. Creative agility involves challenging assumptions and gaining broader perspectives about issues and solutions. Leadership agility focuses on self-development, soliciting feedback, and acting on lessons learned.

Three notable examples from study participants showed evidence of several of the four attributes of leadership agility, as defined by Joiner et al. (2019). The first example showed leadership agility in context setting and stakeholder agility. Reagan, a practitioner, has used AI since 2004 in three countries with various sectors. One of Reagan's AI projects was with a large manufacturing organization. The project was to make diversity and inclusion a strategic imperative. The client leader had heard about AI and believed in the process. The plan involved training 24 internal organizational members to conduct discovery interviews. The next step was to invite all 400 organization members to an AI summit to participate in a dream and design process. The senior leadership team was skeptical of bringing close to 400 people together in a room to design the strategy, mainly because the organization had invited external experts to help inform the strategic agenda in previous years. Senior leaders' primary concern was whether the AI process would generate meaningful data. Reagan observed how the CEO carefully prepared for the event, taking care of the upfront planning and what would happen afterward. According

to Reagan, the leader “positioned it very well, that it would be in service to the organization; and people would take ownership for what they were going to do after the event.” Reagan described her interactions with the leader, noting, “She was really very professional in the sense that It was always focused on, what is the process? What are the metrics? How are we going to do it? Give me the plan.” Reagan described how the CEO wanted to provide her leadership peers with data to convince them that the AI summit would be a good investment. The CEO also required that a senior leader agree to have an organizational member conduct a discovery interview with him live in front of a room of 400 people. The CEO intended to model the organization’s commitment to diversity and inclusion. According to Reagan, the summit was hugely successful. And five years following the event, diversity and inclusion are operationalized and remain on the strategic agenda. The leader demonstrated agility by setting the context for the AI summit and ensuring 400 stakeholders could participate.

An AI initiative led by Cassie is an illustration of context setting and self-leadership agility. The situation was an AI summit for a large organization that brought together 400 HR professionals. The vice president wanted to engage with participants intentionally, staying attuned to her desire to have a free flow of ideas unencumbered by bureaucracy. The Vice-President solicited coaching from Cassie on how she should best show up in the room. The leader asked Cassie’s advice about whether she should join a group or exclude herself from the process. Cassie’s coaching to the leader was to participate and join in discussions that she was passionate about. Cassie observed the leader fully engaged in the process, not from a hierarchical stance. Cassie noted the dynamics in the room, “leadership just emerged, totally on its own...totally organically...and the Vice-President wasn’t one of them. The leader’s report to Cassie was, “I just got to chime in with what I was thinking, and they are not just saying, okay,

do I have to do that? And I'm like, no, they are totally empowered." The leader was able to scan the environment and assess what was needed. In addition, the leader solicited feedback from the practitioner and acted on the feedback immediately.

The third example of leadership agility illustrates context setting, stakeholder, creative, and self-leadership agility. Thomas facilitated an AI culture-building initiative with a 500-person business unit of a construction company. The company was involved in research, production, operations, supply chain, and facilities management. The AI agenda was to build a culture that would accelerate impact. However, Thomas explained that the organization's financial performance declined around six months into the project, and a forced restructuring would involve job losses. Rather than default to hierarchical leadership, the senior leaders leaned into collaborative leadership. Leadership agility was evident in the leader's decision not to abandon the AI process but to re-focus the AI work on strategic and operational alignment. Thomas also noted that the senior leaders were committed to having the culture change initiative owned by the organization's members. Instead of top-down edicts from HR and senior leaders, Thomas explained, "What wound up happening was the culture building team put together what I would call the change management plan or the transformation plan...it was awesome!" Thomas also described how organizational members and leaders spent dedicated time talking about their reflections on the change—a conversation the leaders did not shy away from. According to Thomas, the organization participated in AI interviews that helped people build on past experiences where they have been successful in times of change. Thomas noted, "It definitely moved from a reflection on the best of the past to more of a deep dive of what would support people." According to Thomas, ideas emerged from those interviews that the organization acted upon. The leaders in this situation demonstrated context setting by scanning the environment,

anticipating change, and assessing what is next. The leaders also demonstrated stakeholder and creative agility by engaging organizational members in developing a culture-building plan. Lastly, the leaders demonstrated self-leadership agility by actively self-reflecting on the change.

5.3.4 Leadership Practices That Demonstrated Agility

The analysis of study participants' responses to tension showed that in 15 exemplars, practitioners framed tension as complementary dialectics, such that the two poles were no longer viewed as opposites (Tracy, 2004). In seven exemplars, practitioners vacillated between the two poles, moving between the leaders' authority and collaborative leadership. In four exemplars, practitioners selected the hierarchical pole, deferring to the authority of organizational leaders. The examples cited in previous sections of this chapter described how a default to hierarchical leadership bumped up against collaborative leadership practices, which created tension and demonstrated missed opportunities for top-down support for collaborative leadership.

Participant data established reframing as an effective leadership practice when the dialectic surfaced in AI. For example, Cassie's AI initiative with a nuclear power plant involved a leader's success at reframing hierarchical-collaborative leadership tension. The plant was preparing for an outage to install a new generator. The vice president of the organization, who hired Cassie, told her that the experts in the field thought that a 90-day lead time for outage preparation was "nuts." The confidence of the nearly 700 workers was low. The plant had already experienced two previous outage failures. Cassie stated the plant was heavily regulated and that people were expected to find problems. According to Cassie, people felt browbeaten for making a mistake. Rather than reinforce the tension of top-down regulation, the Vice-President opted to reframe the tension. The first step was to frame the project as "outage excellence." The reframe focused on the ideal outcome, not the past failures. The next reframe was to look at

existing solutions that people believed would work well and expand on those solutions. The third reframe was that the plant began recognizing people for their innovative solutions instead of brow-beating people for mistakes. Ultimately, the plant successfully replaced the generator three days ahead of schedule and three million dollars under budget.

In a similar example of reframing, Leanne, a practitioner with 19 years of experience leading 20 AI initiatives, described an AI intervention with a large university. The university chair had put five-million dollars on the table for faculty to develop new program ideas. However, in the first year, only a handful of proposals were submitted, and only five thousand dollars had been spent. The provost wanted to use AI to help bolster the faculty's confidence in developing curricula and programs. Instead of focusing on the disappointment of receiving a small number of proposals, the leader took another tact. According to Leanne, the reframe focused on elevating strengths, such as past successes of writing new curricula and sharing how that came to be with peers. Leanne noted they convened up to 70 faculty in a huge room to share their stories. Leanne noted, "You have to picture the easels at each table with the list of programs they wanted to work on and voting for each other's stuff." The dialectic of hierarchical-collaborative leadership could have led to the shaming of people for not stepping up to the plate. Instead, organizational members had renewed faith in proposing and developing new curricula.

In a final example of reframing, Thomas described how, during an AI intervention with a construction organization aimed at accelerating impact, a downward financial performance forced layoffs and required people to re-apply for their jobs. The leaders decided to carry on the AI work that had begun to foster collaborative leadership activities. According to Thomas, the leaders acknowledged that there was stress and anxiety in the system and made a conscious decision not to spiral into deficit thinking. Instead, the leaders took a reframed response to the

tension and chose to focus the organization's attention on strategies to support each. The reframe of "support" grounded the AI discovery interview process, in which organizational members interviewed each other about what had helped them in times of significant change. Thomas reported that the reframe supported people in building a culture of "we."

The experiences of practitioners established that the practice of reframing tension added to Joiner et al. (2019) scholarship on leadership agility. Leaders and organizational members were able to continue the practice of reframing, introduced in the discovery stage of AI, to reframe organizational tensions such that past failures became opportunities for excellence; the search for problems turned into the search for innovative solutions; shortcomings became opportunities to elevate strengths; and organizational upheaval were opportunities to build a culture of support.

5.4 Practitioner Strategies for Navigating Tension and Fostering Agility

AI practitioners offered leaders practical strategies to navigate tension and foster leadership agility that went beyond reframing problems into possibilities. The tension of hierarchical-collaborative leadership illuminated underdeveloped strengths, such as leaders' ability to engage in collaborative decision-making processes at critical stages of AI and leadership agility to resist the default setting of hierarchical leadership. Kolodziejski (2004) has argued that untapped strengths become trapped in the shadow. Leaders can potentially take lessons from the shadow regarding supporting collaborative leadership practices from a hierarchy position. However, tapping into and acting on underutilized skills demanded leadership agility. Participants introduced leaders to several practical strategies to navigate the tension of hierarchical-collaborative leadership, including sociocracy decision processes, a transformation

playbook, and individual leadership coaching (Table 9). These practices developed greater precision for understanding how leadership agility can support leaders moving back and forth between hierarchical and collaborative leadership.

Table 9

Strategies to navigate hierarchical-collaborative leadership tension

Strategy	Navigates the tension by...
Sociocracy	Teaching leaders and organizational members how to engage in joint, democratic decision-making processes
Transformation playbook	Engaging a cross-functional, multi-level team in developing a road map for change. The plan supports collaborative leadership in crucial planning areas, such as leaders stepping up.
Individual leadership coaching	Coaching leaders on how to support collaborative leadership initiatives, such as AI.

A practical strategy to navigate tension was to train leaders and organizational members in a democratic decision process called sociocracy. Sociocracy is a process that “relies on consent-based decision-making through active self-disclosure and feedback” (Saxena and Jagota, 2016, p.173). Sonita planned and facilitated an 11-day AI summit for an international relief organization, which included educating attendees on the benefits and applicability of sociocracy decision processes. The organization wanted to prepare people in different countries worldwide to feel empowered to make decisions versus relying on top-down decision processes. Sonita worked with a planning team to organize an 11-day AI summit to introduce participants to the process and give them opportunities to practice. Sonita recalled positive feedback from senior leaders about the model's usefulness in guiding collaborative decisions. From a leadership agility

perspective, the sociocracy model gives leaders a tool to facilitate collaborative leadership and allows leaders to break free of the possibility of reverting to bureaucratic, top-down decisions.

The concept of a transformation playbook emerged from an AI change intervention facilitated by Thomas. The construction organization focused the AI work on creating a culture of “we.” The formation of a culture-building team aimed to move the organization forward. The team comprised 40 members representing different geographic locations, functions, and levels, including senior-level leaders. According to Thomas, the culture-building team created a change management plan with a transformation playbook. The playbook outlined plans for how change and transition would be managed. The plan included work streams to address values integration, engagement, and communication. Thomas shared that a playbook section was dedicated to “leaders stepping up.” Thomas noted:

They said at this time, we are going to need all of our leaders to step up and step into this. They were making suggestions not just to be the change themselves and guiding the transformation but also had a handful of other things that included leadership would need to do and how they would need to operate from a place of values.

Remember that the culture team responsible for creating the playbook was cross-functional and multi-level and demonstrated both collaborative leadership and leadership agility.

Study participants identified individual coaching as a practical approach to developing agility in formal leaders involved in AI initiatives. Of the 26 study participants, 14 mentioned coaching as part of their AI practice. Practitioners used inquiry to help leaders build awareness of the need for agility. Questions directed leaders to consider who should be involved in change efforts, behavioral changes demonstrating a willingness to let go of untested assumptions, and actions to facilitate change. (Table 10).

Table 10

Leadership agility coaching

Practitioner	Examples
Vivian	If we are going to be successful in making a change here, who would we need to get in the room?
Travis	What are the challenges of personnel? What do you need to do differently? If it was different, what would happen?
Lori	What do you need to let go of to fully embody the potential? What is the value of doing that?
Lita	How are you showing up? What might be going on that you absolutely have no clue about and are just making assumptions? What do people care most about? What would it look like if it were working? How is it that you may be potentially contributing to the problem?
Nate	What are you going to do to help the rest of the organization appreciate and understand this situation and these changes? How are we going to do that?

Lita coached leaders in advance of an initiative to clarify the role they would play in AI. Rayelle noted the benefit of coaching leaders in advance, “when the leader gets it, the leader can be a big part...like she just had the ability to flow with it.” Other practitioners coached leaders on agility. For example, Carla helped to prepare leaders by coaching them through the various stages of AI. George, a practitioner who has led over 50 AI interventions in eight years, mentioned how he used coaching when an AI meeting was “going off the rails” due to a lack of leadership focus. Renata stated, “I think having someone external who can coach and support and advise and guide...is helpful to clients to be successful.” The experiences of study participants suggested that coaching leaders before or during AI has been a helpful development tool.

Data indicates practical strategies for navigating tension and fostering leadership agility. Leadership agility goes beyond reframing problems into possibilities. Agility in AI requires that leaders respond to calls for collaborative leadership and move back and forth between hierarchical and collaborative leadership. Practitioners provided leaders with guidance, training, and support in three specific areas: the use of sociocracy as a tool to facilitate collaborative decisions, the development of a transformation playbook jointly created by leaders and organizational members as a guide for positive change, and executive coaching to foster agility to know how and when to support collaborative leadership initiatives.

As I moderated IFGs and individual interviews to test the validity of my findings, participants shared 17 stories related to hierarchical-collaborative leadership tension, specifically about buy-in to AI's shared leadership philosophy. Jackson reflected, "It's not just the leaders—the identified leaders, but it's really for everyone as we look at leadership. Lorenzo noted, "When I look at the leadership structures, how many of them are authentically interested in having a full involvement model?" Lorenzo added, "I'm coming and saying, is there a flattened model where people are really invited in...is their voice really going to be valued?" Julia stated, "I sometimes feel like leaders are like they're used to being at the top, and now they are with the whole." Tracy noted, "Even if they are not like super hierarchical people, they're still leaders who have a need to know and to have the answers."

Further, Grace noted that in her experience, organizational members worry about "can the organization, can the department, can the leader really sustain that...or will it go back to, you know, the way it used to be?" Lorenzo added that even if leaders are intentional about empowering others, he has noticed that, at times, the leaders "weren't as sharp with their practice and in their oversight. Julian described his experience of AI being scary for leaders. Donald

reflected, “I also tell leaders, the leaders that I’ve worked with, that yes, it might be scary at times, but it might actually alleviate a lot of the weights you’re actually carrying on as a leader. Donald spoke further about how leaders are prepared to engage in AI, noting, “Maybe we have prepared them for the first summit. But coming month three, we still need to prepare them. It’s ongoing handholding and coaching and enabling them to flow with that process and everything that it brings up.”

Participants described situations highlighting leadership tension, including when leaders say “no” to things Tracy believes are “healthy.” However, Tracy has seen it become an issue if there are a lot of “no” responses. Grace noted, “You may have a wonderful leader today, but then a new leader comes in two months from now and is oppressive.” Nancy recalled a situation in which new leaders made many promises to be different from the previous leadership but soon defaulted to the same behaviors. Donald leverages the wisdom of others in the organization to coach the leaders, noting that “someone in the room knows what’s going on, or parts of what’s going on.” Iris stated, “It does way more damage to invite this kind of process and then shut it down, to never invite people’s voices in.” Jade reflected that in her experience, “If top leadership hasn’t brought into it, it can be almost worse to do it than to not do it.” Julia concurred, noting, “If you know in your in your mind, in your heart, that the leadership team is not buying into this, you have to have the moral courage to say, I don’t think you’re ready.”

Practitioners offered additional strategies to navigate leadership tension in A, including taking a break during AI conversations to coach leaders on how to stay present, acknowledging that AI can be scary at times for leaders but also liberating and transforming, helping the leader identify low-hanging fruit that the leader can say “yes” to immediately during the design phase of the AI process; preparing a guide to help leaders prepare for high engagement processes;

teaching leaders to have genuine conversations; and using the core AI team as a coaching resource for leaders.

5.5 Conclusion

The first part of this chapter established the leadership shadow as the second dominant shadow in POC. While the concept of shadow has been studied relative to the polarity of positivity versus problems, AI literature has been largely silent on the implications of power-related tensions on positive change discourse. The findings constructed the leadership shadow not as good or bad but as a complex model requiring different skills at different times. Next, I introduced hierarchical-collaborative leadership tension as the second prominent dialectic in AI. The dialectic represents oppositional needs associated with the need to make hierarchical decisions, such as allocating time and resources, that can sometimes run counter to collaborative decision-making processes valued in AI. The findings demonstrated the dialectic surfaced at different stages of the AI process, including the discovery, design, and delivery phases. The triggering of tension during different phases of the process illuminated missed opportunities for hierarchical leaders to set the context for positive change, encourage organizational members to take ownership of change elements and reinforce self-organizing efforts by providing needed resources, mentoring, or advocacy.

The second half of the chapter established collaborative leadership was a new way of working for hierarchical leaders that called for leadership development. This study furthers the work of Srithika and Bhattacharyya (2009), who noted that tensions often surfaced when leaders had to unlearn routines and embrace AI. The data also established four attributes of leadership agility as opportunities for development: context setting, stakeholder agility, creative agility, and self-leadership agility (Joiner, 2018). While there was evidence in the data of practitioners demonstrating several of the four attributes, there was also evidence cited throughout the chapter that more was needed in agility to navigate dialectical tension.

Lastly, the chapter identified three strategies for navigating tension: sociocracy, a democratic decision-making process that enables hierarchical leaders to engage in joint decision-making; creating a transformation playbook to facilitate leaders and stakeholders in collaborative planning processes; and leadership coaching to prepare leaders to address emerging tensions in AI. Practical navigation strategies supported leaders in knowing when and how to move in and out of hierarchical and collaborative ways of working to initiate positive change.

The increased demand for positive organizational change in the wake of racial and social justice unrest emphasizes the timeliness of this research. Leaders are being called upon to exercise agility to lead from a place of authority while engaging with emergent collaborative leadership. A recent webinar sponsored by The Stanford Innovation and Entrepreneurship Program focused on leading in turbulent times. The session taught participants how to decide what matters most (and least) during a complex and surprising crisis, how to use this time as an opportunity to change outdated practices and strategies, how to reset expectations and operations—and why it's the best time to do so; and how to avoid burning out and stay healthy. The O.C. Tanner Institute recently released its 2020 Global Culture Report, which studied more than 20,000 employees and leaders worldwide. The report revealed a crisis in leadership. Only 26% felt that their leaders encouraged collaboration. More than half said their leader would not give up control over anything. The report called for leaders to mentor, encourage collaboration; and help employees build their own social networks within teams and with others in the organization. The time is ripe for leaders to learn and practice new routines to effectively navigate tensions inherent in organizational change.