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USEFUL IDEAS ON RECRUITING, RETENTION & OTHER HUMAN CAPITAL CHALLENGES

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*July-August 2023*

## **Executives who confront new challenges with old formulas often fail.**

The best leaders tailor their approach, recalibrating their "action orientation" to address the problem at hand. Here's three action orientations and how leaders can harness them.

And here's wishing you a great rest of the summer. We're off to Truro on the outer Cape.

See you in September.



## **WHAT KIND OF LEADER ARE YOU?**

*How Three Action Orientations  
Can Help You Meet the Moment*

Organizations rarely reinvent themselves in a perfectly straight line. More often than not, reinvention is like riding a roller-coaster, with the highest of highs and lowest of lows. This is true even at the best organizations, despite leaders who may be able to minimize periods of disruption.

Because change is the only constant, leadership is never one-size-fits-all. Different challenges require different leadership styles. A [recent note](#) from Harvard Business School suggests that an organization's success rides on the ability of its leaders to adapt their leadership style to the problems at hand. Ironically, a leader's past success can often become their greatest liability.

Ryan Raffaelli, the Marvin Bower Associate Professor at Harvard Business School, says leaders often fall into one of three "action orientations" that govern how they take action in unfamiliar settings: analytical, contextual, or relational. The challenge for leaders is to develop a style that blends elements of all three, because "an overreliance on any one orientation can lead to poor action plans that may derail your ability to execute," the note explains.

"Leaders develop a recipe that they assume will work based on their past experience ... and then the context shifts, and they try to apply the same recipe, and it fails."

The analysis stems from one of Raffaelli's core research interests: the qualities of leaders who successfully reinvent themselves to tackle new and different challenges. It reflects insights gleaned from teaching his MBA course, [Leadership: Execution and Action Planning](#) (LEAP), and from classroom observations of mid-career managers in executive education. Over the past decade, Raffaelli has asked hundreds of students and managers to think about what orientation persona best describes them and why.

"I've been studying the traps that organizations and leaders face when trying to reinvent themselves," Raffaelli says. "Leaders develop a recipe that they assume will work based on their past experience, transforming an organization in one context, and then the context shifts, and they try to apply the same recipe, and it fails."

## **The three action orientations in depth**

In studying individuals attempting to reinvent their organization—and themselves—at critical moments, some patterns emerged, which Raffaelli used to develop the action orientations:

**Analytical.** Leaders with an analytical orientation often find comfort in data, leaning on numbers or models to develop a plan that provides the best chance for success (e.g., “data is king”).

**Contextual.** Individuals with a contextual orientation tend to focus on how the situation is influenced by external factors beyond the specific task at hand (e.g., an appreciation for broader market changes, competitor behaviors, or emergent industry trends).

**Relational.** Relational leaders design a plan of action based on how others will perceive and be affected by the course of action (e.g., a focus on power dynamics, social networks, or personal impact).

Each orientation has advantages and disadvantages. Analytical leaders might rely too heavily on data, while relational leaders may try too hard to appease. No single approach is the answer.

## **How action orientations play out in the real world**

Raffaelli has co-authored several case studies to highlight the challenges leaders face when attempting to apply the right orientation.

Consider the Boston Ballet under the tenure of Executive Director [Max Hodges](#). HBS Senior Lecturer David Fubini and Raffaelli tracked how Hodges led a successful turnaround after her appointment at the ballet. Hodges tackled the role with an analytical mindset, instituting data-focused challenges, such as dynamic ticket pricing, and finances improved quickly.

Then came a curveball: The ballet learned it would soon lose its lease on its successful ballet school. Hodges had to shelve additional data-driven changes to address the potential for losing millions should the school have to close. This required a different orientation and set of leadership skills.

Not all leaders catch the cues. A case by Professors Das Narayandas, Joshua Margolis, and Raffaelli documented the short tenure of [Ron Johnson](#) as chief executive officer of JCPenney. Johnson joined from Target and previously worked for Apple, where he’s credited with developing the Apple Store concept.

“The trap is when you rely too heavily on one orientation, the environment shifts around you, and you expect that it will produce the same sorts of results.”

Given his prior success in reading the market, Johnson relied on a contextual orientation to develop various plans to reinvent the JCPenney way, including new concepts in retailing and new compensation plans that drew inspiration from emerging trends across the industry.

While Johnson’s prescription might have been strategically correct, JCPenney wasn’t ready for such dramatic changes. Johnson never got the buy-in he needed from employees, requiring a more relational action orientation, and resigned after 18 months.

“An orientation may serve you well for many years and in many circumstances,” Raffaelli says. “But the trap is when you rely too heavily on one orientation, the environment shifts around you, and you expect that it will produce the same sorts of results.”

## **When to lean into your action orientation**

Insofar as past success can become a liability, Raffaelli’s research also has good news: Nothing stops you from developing capabilities reflective of all three orientations. The key is self-awareness: Recognizing what type of orientation to lean on, how to get the skills to grow, and when to apply an orientation to management and leadership challenges.

Raffaelli challenges students and executives to identify their own “default” orientation. Many find it hard to do so, and he advises them to ask the people around them, such as coworkers, spouses, or partners. He says a way to learn is to invite others with different experiences and perspectives to challenge your action orientation and to point out areas you might be missing.

[Kwame Spearman](#), who left a job at a promising start-up to purchase and reinvigorate Tattered Cover, a revered Denver-area independent bookstore, has had to rethink his action orientation several times in the last few years, according to a new case by Raffaelli.

Spearman and his team quickly changed the trajectory of the iconic bookstore, with new locations and exciting new concepts, such as

developing a wine bar in-store. Spearman's contextual orientation helped him introduce ideas he had seen work well in other industries.

"We don't always realize the impact our orientation can have on our way of thinking, or how others experience us as a leader."

Recently Spearman made a more dramatic change: he resigned his role as CEO to instead pursue a political career. He remains the owner of Tattered Cover but is now focused on public service and running for elected office.

"Career transitions represent yet another critical moment when leaders need to pay close attention to their action orientation," says Raffaelli. "We don't always realize the impact our orientation can have on our way of thinking, or how others experience us as a leader."

*Source: Harvard Business School-Working Knowledge*

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