

The success of situational leadership during the COVID-19 pandemic: fact or furore?

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Lessons learnt from the recent, devastating COVID-19 pandemic are reported in this interpretive investigation. Outcomes confirm that project managers who implement a management leadership style that skilfully integrates the needs of the client and the workforce, admitting available skills and resources in the company, have a better chance to facilitate successful projects and secure opportunities for the future.

The researchers are participants in the Latin American Council of Management Schools (CLADEA) Project Management Research Group focusing on the "impact of situational leadership in times of crisis on project outcome".

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Contents

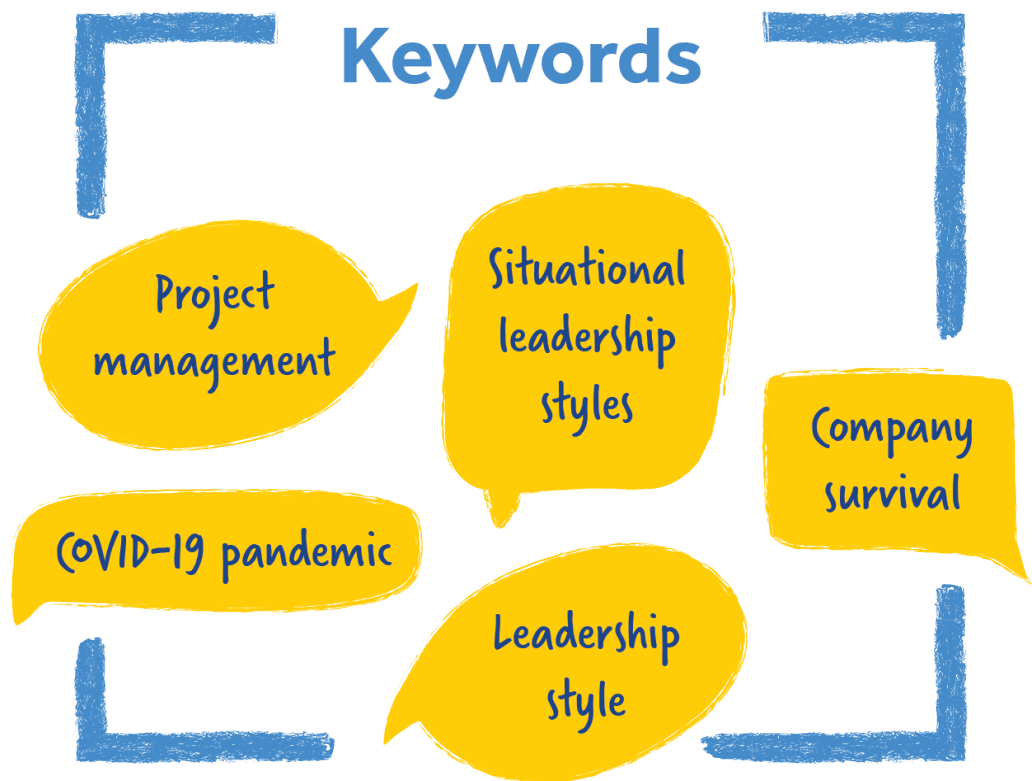
Acknowledgement	2
Abstract	4
The COVID-19 onslaught: 'adapt or die'	5
The crux of the matter	6
From projects to project management	6
Noting the stakeholders	6
Why situational leadership?	6
The investigation	8
Aim and approach	8
Why the critical incident technique?	8
Going into action	8
<i>What is a critical incident?</i>	8
<i>Reporting a critical incident</i>	9
<i>Sample and sampling</i>	9
<i>Interview protocol and data collection</i>	9
<i>Data analysis</i>	10
The findings	10
<i>Predominant leadership styles</i>	10
<i>Critical incidents relating to the leadership styles</i>	11
<i>Critical incidents relating to project success</i>	13
<i>Factors related to projects' success</i>	14
Discussion and conclusion	16
Recommendations and limitations	17
References	18



Abstract

Implementing the critical incident technique, this study qualitatively explores why certain businesses survived and even thrived amid trying circumstances that shook the world during the COVID-19 pandemic in 2020/2021. Involving two diverse sectors – technology and health – virtual interviews with representatives of 17 companies produced insightful evidence concerning the merit of situational management styles. Measures to prevent businesses' downfall and facilitating conditions for growth and success are reported, amplifying the importance of manager-employee-client interaction, and a balanced work-home life. Furthermore, subtle differences between the two sectors concerning the factors that are conducive to achieve successful project outcomes accentuate the relevance of a particular situation/context.





The COVID-19 onslaught: 'adapt or die'

For many companies, the challenges encountered during the COVID-19 pandemic – with its sudden, severe, global onslaught – seemed insurmountable. In an atmosphere of 'adapt or die', good leadership emerged as the only solution to facilitate rapid change, and the agility needed to survive in a highly volatile global marketplace.

The value of a successful leader lies in the ability to motivate and inspire a team, manage conflict, and guide decisions to accomplish successful project outcomes, notwithstanding the circumstances (Lategan and Fore, 2015).

Situational leadership is an approach where leaders adapt their leadership style according to the prevailing circumstances. The idea was initially presented by Hersey and Blanchard (1969), explaining that four distinct leadership styles – namely *directing*,

coaching, *supporting*, and *delegating* – can be used to optimise a team's performance in terms of the demands of a particular situation.

Therefore, in the aftermath of the recent global pandemic, the question that arose to facilitate an understanding of the survival (or demise) of companies during this trying period, was:

So, what types of situational leadership helped to manage projects successfully during the COVID-19 pandemic?

Before introducing the investigation, related constructs are explicated in context.

The crux of the matter

From projects to project management

Simply stated, a **project** represents a temporary, unique effort that is defined by its complexity, size, and scope, is shaped through selected processes and standards, and has a definite start and end (Gardiner, 2017; Ford and Lyneis, 2019). It is always directed by a purpose (Anantatmula, 2020) and governed by detailed inputs and outputs. The success of any project is influenced by multiple variables that are not equally dominant.

Project management was first introduced in the United States in the 1950s, incorporating various theories, tools, and techniques to manage large budget- and schedule-driven projects (Carayannis et al., 2005). Therefore, through project management, measures are employed to ensure that the processes, methods, skills, knowledge, and experience used to achieve the objectives of the project, are apt to satisfy the parameters that the parties of interest have agreed on (Kerzner, 2014). Projects are managed in terms of *project processes*, in distinct phases, namely: an *initiating process* (when the project and its feasibility are approved); a *planning process* (where attainable goals are defined); the *executing process* (when deliverables are carried out); and *final control* (to check completion dates and deadlines) (Davis, 2017).

Project managers are the leaders who oversee projects and implement *strategic plans/ management strategies* that eventually determine the success of the project, integrating operational priorities, production details, and resource availability in terms of the scope of the project. Project managers keep the team united – particularly when challenges arise, chasing a common goal (Gardiner, 2017).

Noting the stakeholders

Project stakeholders have a vested interest in the success of a project. They can be internal or external to the organisation that is driving the project and may be directly or indirectly impacted by the project (Seele and Lock, 2017). *Stakeholder management* is where stakeholders are identified, prioritised, and engaged throughout the different stages of a project (Lindson et al., 2017). For project managers, stakeholder engagement and the related interaction concerning outputs and benefits of the project is an integral part of the success of project delivery (Di Maddaloni and Davis, 2017).

Why situational leadership?

Situational leadership explains that there is no single leadership style that adequately addresses the needs of an organisation. Rather, leaders must adapt their style according to the prevailing context or situation (e.g., an emerging economy, the COVID-19 crisis, or a combination of both), determining the most appropriate form of leadership considering the characteristics of the leader (at the time) and the followers/employees amid the situation (Hersey and Blanchard, 1982). A revised version of leaders' initial leadership styles presented as a situational leadership model (see Figure 1) was published by Blanchard et al. (1986), coined 'Situational Leadership II' (SLII).

Accordingly, with situational leadership, when opting for a leadership type, team leaders will consider the *degree of direction versus the level of support* that their members need, considering *directive versus supportive behaviour* per four levels (Blanchard et al., 1986).



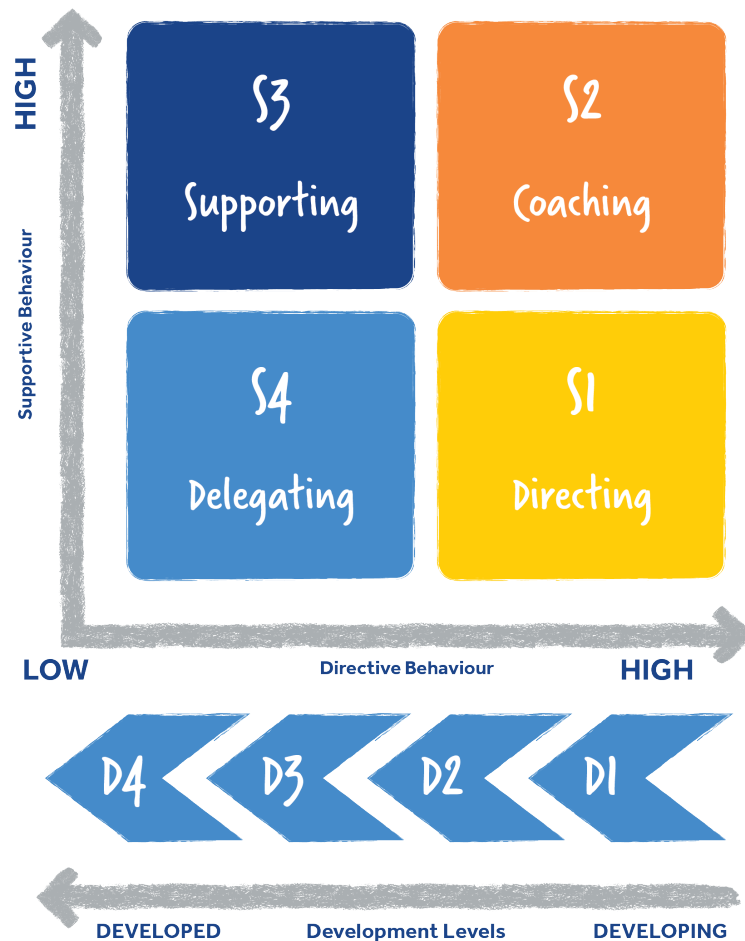


Figure 1: Situational Leadership II model
Source: Adapted from Blanchard et al. (1986)

With situational leadership:

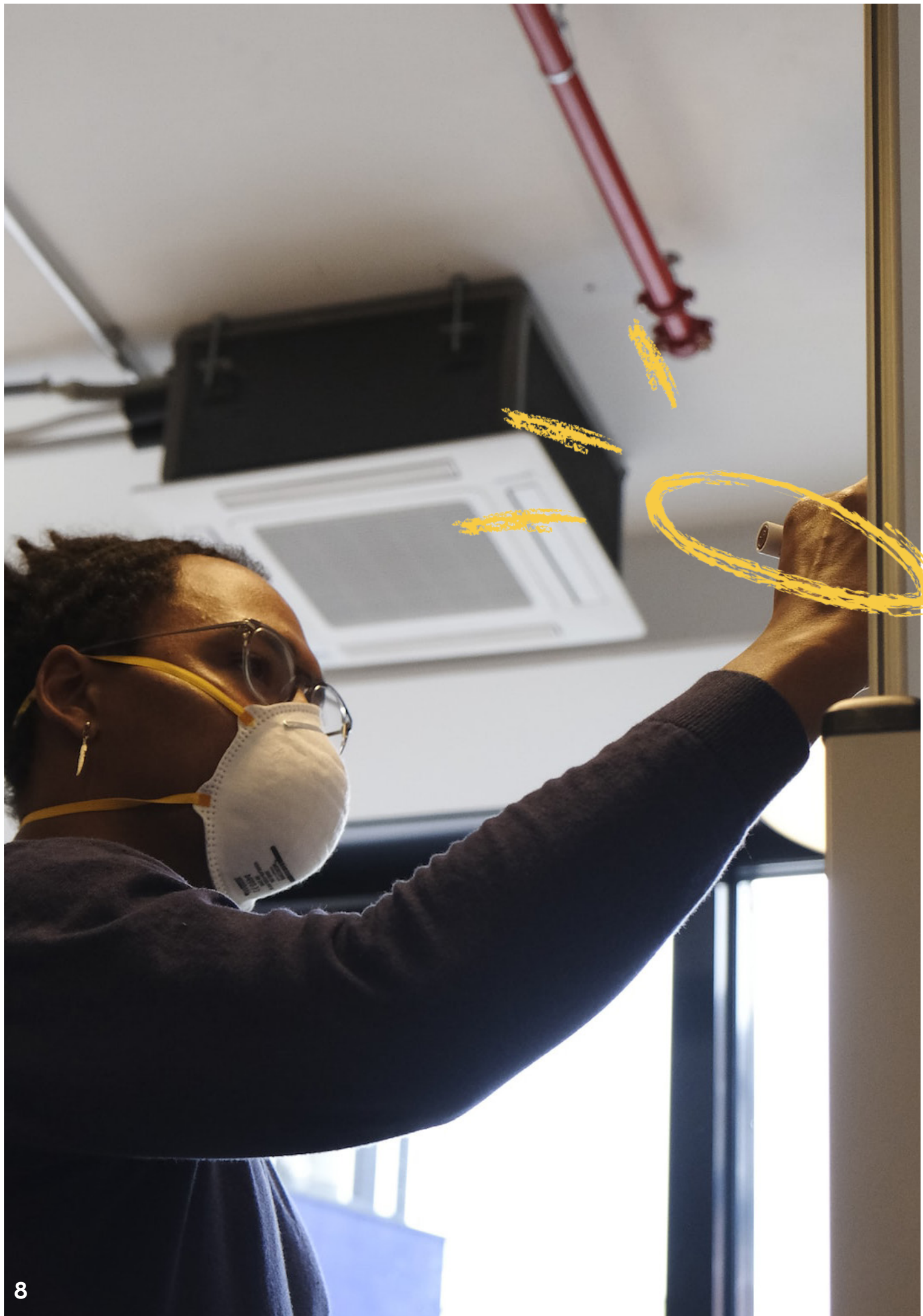
- **when directing (S1)**, leaders provide more direction than support to the team;
- **when coaching (S2)**, leaders provide high levels of direction, also supporting the team;
- **when supporting (S3)**, leaders provide more support than direction to the team; and
- **when delegating (S4)**, leaders provide limited direction and support to team members.

The *development level* indicates to what extent someone/the team has mastered the skills required for the task at hand, considering two dimensions: competence and commitment. It is argued that competence is acquired and can be developed, whereas commitment indicates a natural ability/noesis. Although a person's commitment may diminish over time, it differs from the term 'willingness' captured in the original model, which may indicate stubborn resistance (Blanchard et al., 1993). A specific development level is reached when team members progress from S1 (directing) to S4 (delegating), with D1 denoting *developing a team member* and D4 indicating a *developed team leader*.

The need to implement the right leadership style was confirmed in a study (i.e., Zigarmi and Roberts, 2017) that tested the application of the leadership styles of the SLII framework. The conclusion was that team performance is enhanced when team members experience a fit between the style required and the style they received.

In as much as the project management process is both information-intensive and information dependent, the effective implementation of information management strategies will undoubtedly contribute toward goals to reduce overall project cost and schedule.

(Back and Moreau, 2001: 10)





The investigation

Aim and approach

The study investigated the **impact of situational leadership** during the **COVID-19 pandemic**, specifically between January 2020 and December 2021. The research focused on **critical incidents** that impacted the commercial projects of companies **from the perspective of project leaders and team members** to identify influences from other organisational actors as well as contextual factors that influenced their behaviours and actions during the time.

Why the critical incident technique?

The critical incident technique (CIT) is useful to collect data based on observations recalled from memory and is ideal when incidents are recent, and when the observers are encouraged to make detailed evaluations and observations. Using CIT in this explorative, interpretive study (Tuuli and Rowlinson, 2010; Ramseook-Munhurrin, 2016) provided an opportunity to:

- Learn from participants' spontaneous disclosure of a collection of incidents based on salient and memorable experiences;
- Identify the most significant positive and negative critical incidents about the projects;
- Generate new, relevant research evidence based on personal experiences;
- Optimise the information shared to improve projects in the future; and
- Evaluate participants' attitudes across various projects and settings.

Going into action

What is a critical incident?

A critical incident refers to a decision and/or action of a team member or person directly or indirectly involved in the project, which significantly influences the outcome of the project in terms of its:

I.C.E

- Impact on participants/beneficiaries and other stakeholders;
- Contribution to business sustainability; and/or
- Efficiency measured as duration/cost/resources required.

Therefore, a critical incident is not necessarily a crisis and/or negative event

Reporting a critical incident

A participant who reports a critical incident is usually given time to think about the incident and must be confident that the incident has had a causal relationship with the outcome in terms of the success or failure of the project (Davis, 2006). Carefully crafted follow-up questions are generally used to reveal other incidents, including competencies, knowledge, context, or other attributes related to the specific incident, such as alternative behaviours during the strict lockdown periods.

Probes used for the CIT differ from standard interview questions (Davis, 2006) in that a participant has to think of a project (successful or not) and then describe a specific time/incident when someone/something contributed to the success/failure of the project. Typical questions/instructions are (Mallak et al., 2003; Davis, 2006):

- *Identify the events that led up to the critical incident.*
- *What did the pivotal individual do to make it a critical incident?*
- *Identify the outcomes of the particular critical incident.*
- *Identify possible implications of the critical incident.*

Researchers should be aware that participants tend to focus on negative incidents, compromising the completeness of the insights gained (Dasborough, 2006 cited in Davis, 2006).

Sample and sampling

The **purposive sampling** (Gremier, 2004; Crouch and McKenzie, 2006) method was employed to intentionally recruit an array of participants with the relevant expertise, given that the goal of the study was to understand what worked during the recent crisis, rather than to understand how all, or even most, companies responded to the crisis. A **diverse sample** of 18 participants, including project managers, project sponsors, project team members, engineers, designers, and analysts, were recruited. They formed part of 17 South African organisations, which promised a more comprehensive report of incidents and different perspectives in various project settings (Flanagan, 1954). Participants were predominantly in information technology, including start-ups, and multinational companies and the health sector, including a pharmacy, a hospital, and a pharmacologist at a university.

Some of the *projects* included establishing a command centre for private hospitals that navigated the challenges and opportunities posed by COVID-19, delivering laptops to learners at different colleges, offering innovative technology solutions to large manufacturing and retail banking companies, and shifting a call centre to agents' homes. ***The diversity of projects together with the precarious financial positions of some of the companies strengthened the data set and contributed to its reliability.***

Interview protocol and data collection

Data were collected via **semi-structured, virtual interviews**. An **interview guide** was emailed to willing participants in advance to allow them to contemplate positive and negative critical incidents for discussion during the interviews (Bott and Tourish, 2016). The participants were alerted not to focus on negative incidents only, which generally have longer-lasting, more intense consequences (Davis, 2006). Leadership behaviours were not specified at the onset. Interviews had a **limited structure** and were driven by what the participants considered

important. Probes merely served to find a balance between dialogue and clarity without raising unneeded response bias.

The **interviews** lasted approximately one hour and were halted after 18 interviews, when data saturation became evident, procuring a total of 128 incidents for analysis. In CIT studies, **the sample size** is based on the number of critical incidents, instead of the number of interviews to adequately cover the subject of study and the complexity of the research problem (Tuuli and Rowlinson, 2010).

Data analysis

Transcriptions were analysed to identify narrative structures that produced insight concerning critical incidents that impacted the success of projects. Information was *categorised as per the four types of situational leadership* of Blanchard et al. (1993) using the steps of analysis of Butterfield et al. (2005), namely to:

- State the frame of reference;
- Formulate the categories inductively (relying on insight, experience, and judgement), involving experts/fellow researchers to validate the categories – the most challenging step to retain detail, specificity, and validity (Flanagan, 1954); and
- Determine the level of specificity in the data (general versus specific behaviours).

The findings

Predominant leadership styles

In the majority of the projects, *more than one situational leadership style* was implemented to achieve success (see Table 1). Two of the three projects in the health sector combined three situational leadership styles, while almost 80% of the technology projects implemented two or three situational leadership styles to reach their goals.

Table 1: Situational leadership (SL) styles implemented by the companies

Sector	One SL style	Two SL styles	Three SL styles	Four SL styles
Health	0	1	2	0
Technology	3	5	5	1
Total	3	6	7	1

Source: Authors' analysis

The only company that implemented four leadership styles delivered a unique project, rolling out a multidisciplinary team to deal with the COVID-19 predicament that almost brought the company down. Through ongoing training, team members developed a full understanding of all aspects of the business, even incorporating virtual social activities to keep members engaged and enable growth. The clients now perceive the company as a partner in the growth and development of their business, while the company has remained in business and offers a unique service to its clients, with multiple growth opportunities. The managing director explained:

We did lots of team building exercises ... lots of training ... getting the remaining staff's knowledge of the business up to a certain level ... it just gives our customer opportunity to face people with more knowledge....

Critical incidents relating to the leadership styles

Concerning the application of the situational leadership styles, 82% of the project managers used the directing type of situational leadership (S1) to deliver their respective projects, 65% implemented coaching (S2), 53% utilised the supporting style (S3); and 41% delegated (S4). Refer to Figure 2.

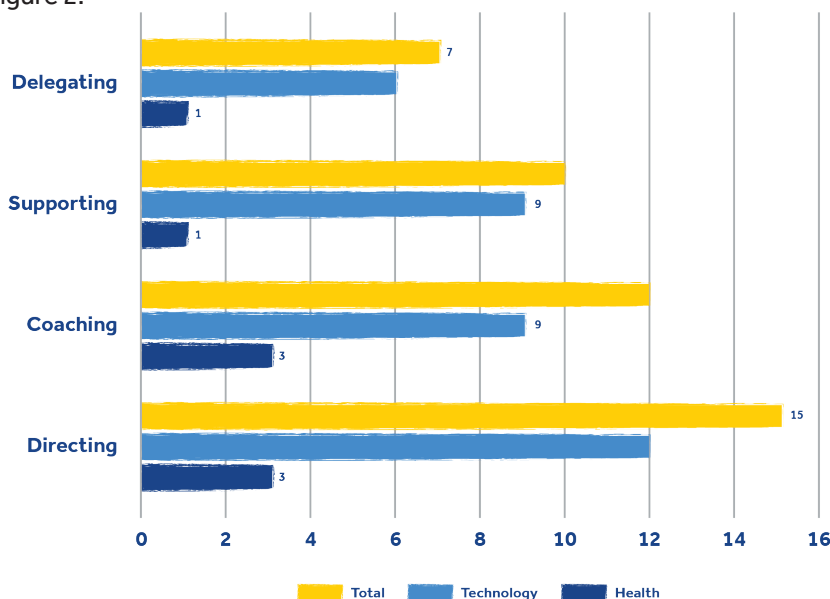


Figure 2: Types of situational leadership by sector

The critical incidents relating to the four leadership styles differed.

The directing style (S1) comprised decisions to continue offering services during the various iterations of COVID-19 lockdowns through a multitude of activities and was employed by majority of the participants.

Critical incidents included: going online, allowing/enabling employees to work remotely; offering new services/products; creating new structures to mitigate the impact of COVID-19; adapting traditional project management methodologies by reducing the planning phase; conducting more risk assessment meetings; extending status meetings to enhance learning and bonding; delineating tasks to keep team members connected; retrenching employees to preserve members critical to delivery; investing in IT infrastructure; adequately resourcing projects; and guarding against bankruptcy.

Outcomes included: a technology company preserved its employees, regarding them as the real asset of the business, although scrapping bonuses temporarily. Another company that lost nearly 80% of its revenue during the lockdown retrenched employees and retained others who could take the company further. A health company that owns private hospitals established a command centre to facilitate the delivery of health services during the pandemic.

The coaching style (S2) was used by two thirds of project managers to provide emotional support and keep employees connected during the pandemic.

Critical incidents included: additional training; complementing regular online risk assessment meetings with longer routine project status meetings; sharing information continuously; and providing clear frameworks for operations. Branches were allowed to adapt operating procedures to their unique contexts; certain skills were transferred to partner organisations; clients were guided concerning how services and products are delivered in organisational cultures; employees were encouraged to voice their ideas and concerns during online meetings; and employees were trusted to work remotely.

Outcomes included: The pharmacologist shared his expertise with another remotely located research facility to produce alcohol-based hand sanitiser to meet the growing demand. A technology company that depended on its call centre enabled its agents to effectively work from home, trusting them, and securing success through daily meetings, continuously sharing information, having training sessions, and ensuring that the team remained connected. The team's productivity increased significantly, earning them unbudgeted bonuses. The project manager explained:

The big value that we got out of that, was that we realised that we could trust our staff to do the right thing, to try something new... we got massive, massive value out of this working from home, and even after COVID, I will never let them come back to the office.

In a health project, a company ran a pilot at the head office to demonstrate that their participation in the COVID-19 testing and vaccination was feasible. Senior managers were deployed to retail stores to provide support to employees working at the coalface of delivering essential COVID-19 services. One participant explained:

The first vaccine we did was at the head office itself ... all the skilled people were here. In four weeks, we changed the process about 50 times ... all the regional managers from throughout South Africa came and spent the day at the mass vaccination site....

A technology company was tasked by a client to amalgamate 80 human resource systems and move them to cloud computing. The project manager set up a governance committee to keep the client's management informed, establishing a working relationship that turned them into genuine collaborators. The project team was supported through virtual social events to further a healthy balance between work and personal time. The project was delivered on time, and on budget, making them 'experts' in the relevant sector due to their intense collaboration with the client.

The supporting style (S3) was employed by nearly half of the project managers.

Critical incidents included: drawing on the company's physical and intellectual resources; increasing the frequency of reporting to project team members; helping team members to remain connected while working remotely; creating virtual social events; employing counsellors to help employees cope with COVID-19 and working remotely; building trust among team members; understanding the cultural diversity of employees; and ensuring that meetings were purposeful and impactful.

Outcomes included: in a health project, the project manager asked the organisation for physical and intellectual resources to conduct a project outside of the organisation's core business. The participant explained:

I asked if anybody in the community had an overhead stirrer and no one had. One of the professors in physics responded and roped the technician and chemist in physics in on it ... they came and they measured up and they made a stirrer calibrated to the right speed.

Project managers who had to move employees to remote working during the various iterations of COVID-19 lockdowns reported increased productivity. Nevertheless, one company failed to address the human element, subsequently experiencing conflict among employees, despite significant investments in tracking resources to make remote working transparent to everyone. The issue was resolved by employing counsellors, and moving back to newly rented office space designed in collaboration with the employees. The project manager explained:

One of the biggest mistakes that we made during that time is not taking people factors into consideration ... being a technology company, we just threw more technology, more technology, more transparency, more openness ... the human element got horribly lost.

The delegating style (S4) was mainly used by project managers who had to deliver on large and complex tasks, involving multidisciplinary teams.

Critical incidents included: daily meetings to do risk assessment; providing clear instructions and standard operating procedures; authorising team leaders to make final decisions; and entrusting team members. A project manager hailed the value of this approach:

I think just the agile methodology of having daily stand-ups, having sprints do some proper sprint planning and stuff like that. So just around the agile methodology of running projects....

Outcomes: The only company using the delegating situational leadership style was experienced in this practice, has offices across the globe, and offers services in diverse country jurisdictions, involving multidisciplinary teams with members from different offices. The COVID-19 lockdown that reduced face-to-face interactions with clients had limited impact on their teams. Nonetheless, some changes were made, generally meeting more frequently online. Projects were delivered earlier than planned.

Critical incidents relating to project success

Participating project managers indicated that while delivering projects *on time and within budget* was important amid the ongoing business risks induced by COVID-19, the success of their endeavours was strongly influenced (as shown in Figure 3) by *providing products and services that satisfied clients, maintained business and commercial performance/sustainability, and ensured quality performance*.

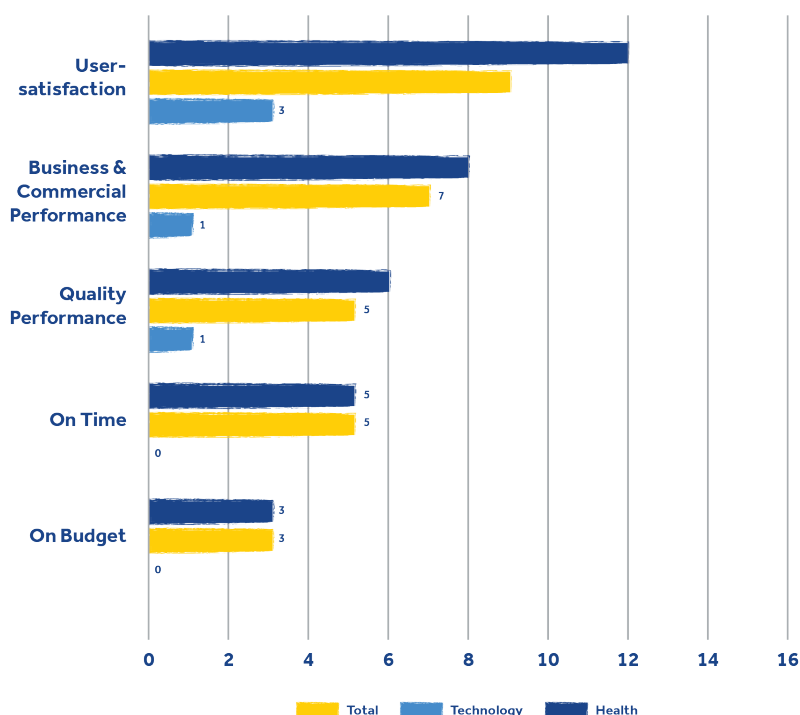


Figure 3: Criteria for project success by sector
Source: Authors' analysis

Since *time* and *resources* were crucial during the pandemic, projects were handled with urgency and intent. A project manager from a multinational technology company explained:

We as South Africans ... the pandemic has given us a purpose of now ... the end question is how do we shorten time to market. What are those key things that influence the organisation from a service delivery, from a capacity perspective to mobilise them now ... it affects all economic layers.... There needed to be a heightened sense of urgency and service delivery.

The leaders of a project that delivered 733 000 laptops to educational institutions understood the importance of the delivery in preventing loss of learning. Project management capabilities centred on securing the safety of employees during delivery and securing distribution to the right learners. Challenges encountered included student political interference concerning the suppliers and destiny of the merchandise, potential robbery of valuable merchandise, and the risk that employees could contract the disease. The project manager explained:

In each and every university or school, there's different political challenges ... you have to deal with all ... they will say: 'Oh, you got this big project ... can't you employ me as well?' we have to deal with the politics of students, and manage that carefully.

Factors related to projects' success

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Project success factors refer to conditions that enhance the success of projects, differentiating (Radujkovic and Sjekavica, 2017):

- **M**anagement competence;
- **O**rganisation structure and culture; and
- **M**ethodologies, tools, and techniques.

Overall, the findings of this study (summarised in Figure 4) conclude that for both the technology and health sectors, three factors emerged as most important to secure projects' success: *clear goals, adequate resources, and skilled talent integrating management competence* and the *right methodologies, tools, and techniques*, as per Radujkovic and Sjekavica (2017). Success factors, presented in Figure 4, emerged from spontaneous discussions with participants, who were not asked to prioritise so-called success factors. However, it is interesting that the technology sector that was represented by a larger number of participants neither mentioned the importance of a *reputable project manager*, nor *leveraging positive relationships with all stakeholders*. Similarly, no reference was made by the health sector about *regarding employees as assets*, the *importance of experience, team commitment, an understanding of cultural diversity, remote working, and labour arbitrage*. Therefore, to conclude, certain success factors are universal, but the prevalence of factors may differ per sector.

Health sector participants singled out two factors, namely *clear goals* and *adequate resources* (management- and methodologies/tools-related), as being the most crucial to achieve positive outcomes. They indicated eight other conditions/factors (mostly related to organisation structure and culture, methodologies, and techniques) as equally important, although less so than the former: *skilled talent; building trust* with stakeholders; an **enabling company culture**; *collaboration* with stakeholders; *communication* with stakeholders; creation of business opportunities; *leveraging existing positive relationships*; and having a *reputable manager* (reflecting management competence).

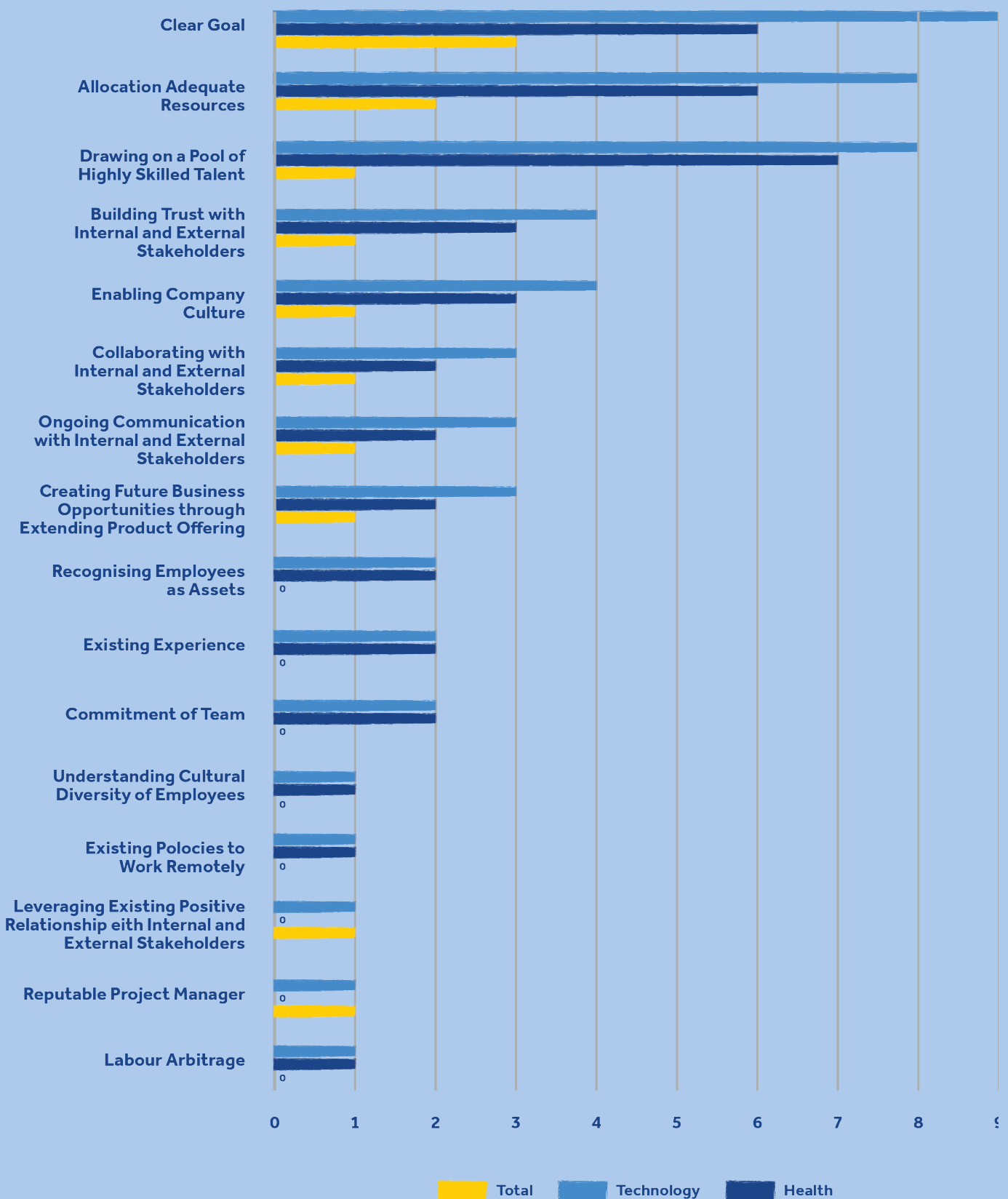


Figure 4: Factors that contribute to project success
Source: Authors' analysis

The health project that conducted COVID-19 testing and vaccinations at primary healthcare clinics experienced the importance of *trust and competence* in their relationship with the Department of Health and during their delivery of mass testing and vaccination. At the company level, success was achieved through increased communication, allocation of adequate resources, and the leadership of senior management. The company obtained additional business opportunities and has now partnered with the Department of Basic Education to roll out other vaccines at schools.

Technology sector participants indicated a larger array of conditions to achieve success, aligned with the health sector to some extent, but more strongly emphasising organisational structure and culture than the health sector, mentioning: *recognition of employees as assets; experience; commitment; cultural diversity; policies to work remotely; and labour arbitrage*. For example, the technology company that struggled to get its team to effectively work remotely realised the importance of soft skills. Management collaborated closely with employees when designing the new premises they moved into after the pandemic, commenting:

So we spent a lot of time chatting to the team about what would work for them ... it was a deeply interactive process for everybody. We were able to accommodate everybody's needs ... people looked forward to going back to the office.

For most of the complex technology projects, building trust with their clients and within their teams was considered critical to the success of the projects in these difficult times. Regular risk assessment meetings were held to boost confidence. The connectedness among team members was advanced through longer project status meetings allowing time to share experiences and provide feedback, also arranging enjoyable virtual social sessions. Project management was adapted to integrate soft skills, such as understanding the cultural diversity of team members and regarding them as an asset rather than a resource.

Discussion and conclusion

At the onset of the COVID-19 lockdowns, project managers had to *make decisions quickly* to ensure all their business functions were apt, that new services and products could be offered in response to the exigencies of the pandemic, that revenue streams were sound, that their businesses would survive, and to safeguard employees' well-being. Understandably the, *majority of project managers implemented a directing situational leadership style*. The exception was technology companies that had historically worked with teams dispersed across offices and countries, having experienced working remotely, and being focused on improving their coaching and delegation situational leadership capabilities.

Working remotely during the COVID-19 pandemic *elevated the importance of enabling and supporting functions*. Accordingly, project managers *combined a directing leadership style with coaching, supporting, and delegating capabilities*.

A coaching leadership approach was frequently used to build trust among employees by, for example, increasing their technical and emotional capabilities through online training and support. Supporting situational leadership capabilities was highly suitable to keep employees connected during the pandemic when people felt isolated while dealing with health-related concerns and the reality of job losses.

The pandemic was a catalyst that promoted remote working, but it underscored companies' soft skills, as companies often neglected the importance of company culture and individual well-being. A notable finding is that traditional project management methodologies were adapted in response to the COVID-19 pandemic. Project managers realised that to successfully deliver on projects while team members worked remotely and with limited face-to-face interaction with clients, it was *crucial to frequently provide evidence of progress*.

Subsequently, five changes were made to the traditional project management methodology in response to so many variables that increased risk and uncertainty, namely:

- *Reducing planning time so that clients would experience a 'heightened' sense of urgency towards the critical delivery;*
- *Emphasising 'incremental delivery', delineating outputs so that smaller projects could be assessed and reported on more frequently;*
- *Conducting frequent risk assessment meetings for a quick assessment of team members' progress and emotional well-being, and to mitigate any new risks;*
- *Running longer project status meetings that included learning and feedback opportunities to keep team members connected; and*
- *Offering virtual social opportunities for team members and clients to remain connected and to ensure overall emotional well-being.*

Project managers regarded the importance of time and resources as a given during the COVID 19 pandemic, rather focusing on user satisfaction, business and commercial performance, and quality performance to enhance the success of their projects and the sustainability of their businesses. Additional project success factors included building trust, collaborating, and ongoing communications with all stakeholders.

The study confirms that situational leadership presents a useful model to understand the nature of leadership required in project management due to its contingency-based assumption. The COVID-19 pandemic offered an opportunity to affirm this assumption and to examine the model's veracity. In this study, project managers' decisions were not only shaped by the exigencies of the pandemic, but also by the level of development or maturity of teams and clients, and the complexity of the projects. The pandemic underscored the significance of clear goals, availability of resources, and relevant skills as project success factors. Project managers, who recognised these enabling factors, combined directing with coaching as their situational leadership types, investing time and effort in enhancing trust, guarded company culture, and continued to collaborate and communicate to foster new business opportunities.

Recommendations and limitations

The diverse sample provided invaluable insight concerning businesses' behaviour and management styles during the COVID-19 pandemic. Findings confirmed the relevance and fluidity of situational management styles during the devastating global crisis that brought many businesses to their knees. The disclosure of facilitating conditions for success revealed subtle differences between the two sectors that were involved. The findings acknowledge important similarities in businesses' approaches to project management. The two sectors agreed about the need for a *goal-orientated approach* and the *importance*

of resources, skilled talent, and trust to enhance success during a crisis period. However, these findings also highlighted the uniqueness of different working environments, cautioning that a 'one-size-fits-all' approach to project management does not reflect the realities that diverse companies have to manage under trying conditions. Certain aspects, such as the role of a competent manager, team commitment, experience, and leveraging existing positive relationships, deserve further attention to detail their relevance in terms of projects' success in general.





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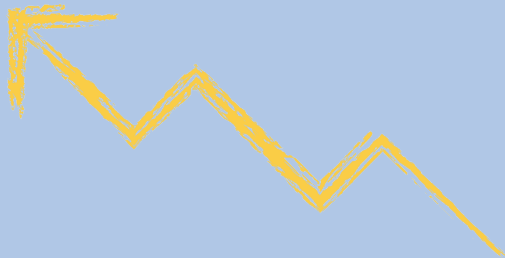
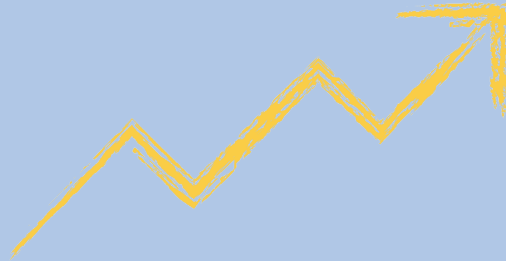
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