Management derailment in South Africa across generation and gender

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by

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DECLARATION OF OWN WORK

I declare that this research project is my own work. Submitted in partial fulfilment of the requirements for the degree of Master of Business Administration for the Graduate School of Business Leadership, University of South Africa, it has not been submitted before for any degree or examination at any other university.

The research data used was provided by Jopie van Rooyen and Partners (Pty) Ltd and Hogan Assessment Systems.

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EXECUTIVE SUMMARY

In South Africa, the drive for companies to remain competitive has never been more important. Managers and leaders across industries are faced with demands from both their internal and external environment: they are required to remain up to date with an ever changing work environment, remain competitive in a difficult economy, compete with international counterparts: and all of this is done within the context of a multi-cultural and strained internal environment. It is therefore not surprising that failure occurs as often as success does, and failure at executive level can be devastating. Managerial derailment occurs when managers whose careers are expected to prosper, unexpectedly fail. The distressing outcome of managerial derailment is even more compounded when considering South Africa's small talent pool characterised by hypercompetition for that talent.

South African companies are faced with extreme demands on their talent management and succession planning programmes: not only are certain managers or 'talents' highly mobile between companies, but fast-tracked or talented individuals are also leaving the country in vast numbers. Retaining and developing high potential managers as part of a leadership pipeline is a critical aspect for business, and understanding not only the strengths these managers bring, but also how they derail and how interventions could be tailored to avoid derailment, or at least lessen the impact, is imperative for sustainable growth.

In an effort to develop a clearer understanding of derailment in the South African context, a sample of South African managers across gender and generations was selected. A quantitative analysis was completed to measure the incidence of derailment across managers as a group, and highlight any similarities and differences between gender and generations across industries in South Africa. This study is considered exploratory, in order to serve for future planned studies.

The aim of the research is to highlight differences, if any, between gender and generations, in order to ascertain whether unique developmental programmes or derailment interventions would be required based on an individual's gender or age.

A key limitation of the research is a lack of data on the tenure of the managers participating in the research, as well as a lack of research regarding the potential impact of cultural differences on derailment behaviour.

The findings of the study indicate little difference in derailment behaviour across age groups and gender. Women have a tendency towards being more Cautious, and Generation Y tend to be more Dutiful. In terms of incidence, South African managers tend toward Bold or Dutiful as main derailers, and individuals manifest on average one main derailer.

The study concludes that programmes to address potential derailment do not necessarily need to be adjusted based on gender or age differences, but rather on specific derailment behaviour. In conclusion, further research is strongly recommended to provide further insight into derailment in a unique South African context.

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CHAPTER 1: PROBLEM IN CONTEXT

1.1 INTRODUCTION

This study will introduce and describe the occurrence and some of the attributes of management derailment behaviour across gender and generations within South Africa. Managerial derailment occurs when a promising career is halted or otherwise derailed from upward progression due to personality or behavioural characteristics. The result of derailment is usually failed business projects or opportunities, or strained or difficult interpersonal relationships. The potential implications for the workplace are therefore immense.

South Africa competes in the global business arena, and with the country's history and context, managers face unique challenges. Due to a variety of factors, talented individuals are being fast-tracked at extremely high paces, and are often pushed beyond their competency levels by being placed in high level or leadership positions before they have had the time to develop the required skills. Talent management, specifically coaching, development and succession planning initiatives are largely still adopted from international practice, and this research hypothesises that an understanding of the South African manager will enable improved adaptation of these models, improving talent management and succession planning.

Chapter 1 will provide background to the study, define the research problem and attempt to elucidate the value of a clearer understanding of management derailment in South Africa.

1.2 PROBLEM IN CONTEXT

Derailment is the destructive behaviour exhibited by managers across their work environment and interpersonal relationships. Whether the behaviour is exhibited as excessive arrogance, scepticism or even paranoia, or becoming subservient and perfectionistic, the effects of the behaviour on own career and relationships with others can be far-reaching; be it that arrogance and a refusal to accept feedback causes frustration on the part of a mentor, or a failed product launch at a cost of millions.

The South African media is a rich source of examples of leadership derailment in South Africa, with Eskom, Airlink, the South African Police Service (SAPS), the ANC Youth League or the South African Broadcasting Corporation (SABC) serving as potent reminders of how destructive poor leadership and the lack of effective talent management, and particularly succession planning, can be. These examples encompass the destructive power of not only executive boards, but also of individuals, and range from financial problems to reputational decline, to the potential for creating significant conflict.

Grant (2008) describes the new role of the CEO as leader of organisational climate and culture; someone responsible for maintaining a shared vision and strategy, and aligning organisational design and human resources. This view of leadership shows its pragmatic value in, for example, the February 2010 ministerial report (Sabinet, 2010) on the SABC's current situation, which highlights the need for stronger collective management and the nurturing of younger personnel for management positions as key recommendations toward improvement of the organisation. Other South African organisations face a number of problems that could be indicative of leadership issues: violent and destructive municipal strikes by the South African Municipal Worker's Union (SAMWU), poor service delivery strikes and protests which could be ascribed to a failure on the part of governmental leadership to create a culture with open feedback or constructive conflict resolution; the violent, ill-disciplined and corrupt reputation of the SAPS and recurring rumours of corrupt government officials could be the result of a similar situation; and the battle for leadership at Eskom after CEO Jacob Maroga's departure points to a deeper complexity in a chaotic South African industry: insufficient or poorly maintained succession planning. The reputational impact of this type of derailment can be seen in the rich variance of case studies to be found in the local press.

Leadership across business, politics and the military is considered a crucial factor for success. Companies invest signifiant resources in development programmes for their top performers, and numerous new leadership models and development methodologies emerge each year; the question though is whether these programs or interventions are effective at delivering what they promise. Interpersonal ability has become equally important to technical skill – leading not only the self, but also

leading others and leading teams. Further additions to competency frameworks are usually leading change, networking and business acumen, and effective leaders are expected to show competence across these categories.

Despite the progress made in identifying the characteristics that make for successful leadership, little agreement exists on exactly what makes a good leader. The awareness of, and interest in understanding poor leadership, has only recently become a topic of interest, with most authors first publishing from the late 1980s (Padilla, Hogan and Kaiser (2007). Fully emerging in the 1990s as an area of interest, managerial derailment is a relatively novel topic compared to the plethora of publications generated over the past 100 years of research on management and leadership. Knowledge of the topic has become more sophisticated over the last two decades. Initial discussion revolved around charisma; the research then progressed to a study of narcissism, and finally evolved into a broader view of derailment behaviours, not only related to narcissism, but to broader personality attributes that result in derailment or destructive leadership.

The cost of management derailment is not just measured in the costs associated with dismissing a poor manager, before recruiting, selecting and training a new one. Hidden costs such as reputational decline, costs of failed projects, lost opportunities, resignations of star performers and destroyed team morale amongst those left behind all contribute to the actual cost of a derailed manager within an organisation. (Hogan, Hogan and Kaiser, 2009). Added to this is the loss of time and skill when a manager who had been part of a succession plan or leadership pipeline is lost; the investment in training and development of such a person is lost as well.

The costs and the risks associated with derailment escalate with seniority and scope, as the high-profile executive derailments can attest at companies like Tiger Brands, Airlink and Eskom. However, these often quoted and highly visible managerial derailments are not the only incidences of derailment. Burke (2006) estimates that half of those in leadership positions are falling short; not necessarily derailing to a point of unethical or criminal behaviour, but still not achieving their full potential. Hogan and Hogan (2001) estimate that 50% to 75% of leaders are performing below expectation, and the number of leaders fired for failure to perform is steadily

increasing, and the tenure of leaders is steadily dropping. This points to derailment at an individual level, with significant consequences for companies and industries, often because of the subtlety of individual derailment and it potentially going undetected by those who could intervene, or a slow response to intervene, as well as the tendency to believe that negative behaviour will correct itself, or improve with the help of generic development initiatives. A further issue caused by derailment or poor management is the derailment or demotivation of others. If a leader's principal responsibility is to lead others and motivate them towards a common vision, his own derailment and resulting destructive behaviour could very well also derail those around him – poor leadership can therefore not only impact on productivity and achieving goals, but also on culture, morale and teamwork.

Derailment can end a potentially successful career, but it is also the case that a manager could derail in one environment, or during a specific time, only to recover successfully. Leaders with reputations as effective or successful, could potentially also exhibit derailment behaviour. Alan Knott-Craig (Sr) has a reputation as an extremely effective leader, but allegations of nepotism have been made against him. Maria Ramos turned Transnet around, but has been described as ruthless and less than willing to consult with stakeholders; former president Thabo Mbeki's style progressively turned more paranoid. Raymond Ackerman is often described as the ideal example of a servant leader, but has also been described as overbearing in the boardroom. And former Eskom CEO, Jacob Maroga's style has been described as intimidating, flammable and defiant. These leaders are examples of successful managers who at times derail, with various levels of consequences ranging from reputational decline to complete derailment in Maroga's case, as an example.

The leaders named above are arguably examples of excellent business leaders in their own right, despite some derailment behaviour being present. At another extreme though, is the example of Jacob Maroga – the events leading up to Eskom's search for a new CEO indicates clear derailment. Reports of his intimidating and feedback-defiant behaviour, and the subsequent reputational impact on Eskom, as well as financial losses, non-delivery complaints and strategic problems the company faced, show not only his personal derailment, but the immense negative impact that a leader's derailment has on a company.

South Africa faces many of the same patterns that international counterparts face in terms of a workforce characterised by significant changes to its demographic. Women are entering more leadership positions, and it is becoming more acceptable for them to exhibit the same type of ambitious behaviour and work ethic (the job comes first) as men in some environments. The number of women as breadwinners is also increasing, which is likely to bring a unique set of stressors as they try to balance career and family.

An aging workforce is a further demographic that impacts on business, be it at management level, or when it comes to succession planning and skills management. Generations of workers share similar contextual experiences (for example, Generation X's experience of the start of a new South Africa differs from the younger Generation Y). Whilst four generations co-exist in the current workforce, Generation Y dominates literature at present. The generation gaps, engaging and motivating Generation Y, and the optimal leadership approach for this generation, is at the forefront of current research. Another area for concern, is the looming mass retirement of Baby Boomers, as this first members of this age group reach retirement age in 2010/2011. Skills have become more important than experience in the current workplace, and it is not uncommon for a manager to oversee a number of older individuals. This results in a unique social dynamic, with integration of motivation incentives to tailor to different generations being a pertinent challenge, along with the challenge of finding mentors for young executives as they progress through ranks no longer defined by age.

A top managerial position is not a guarantee for future success, as a manager has to stay in touch with realities and remain aware of changes affecting him or her and the organisation as a whole (Denton and Van Lill, 2006). Achieving a desired position might relax some of the stressors induced by the effort required for fast-tracked promotion, but could bring an entirely new set of stressors, as a person is suddenly faced with new challenges that tax skills and competencies not previously required or practiced. Complacency could also be a risk factor for the negative behaviours associated with destructive leadership to occur, as achieving a desired position could diminish the need to behave according to expectations.

Talent management in South Africa has a number of key challenges. Authors like Kerr-Phillips and Thomas (2009) describe the current 'brain drain' of knowledge workers as a crisis, resulting in the depletion or loss of intellectual and technical skill. Talent retention is therefore vital for South Africa in order to maintain economic growth.

This is not the only challenge posed by the macro environment. Companies are also pressured to improve BEE ratings, often resulting in fast-tracking of high potentials at an unrealistic pace. Not only does this place immense pressure on individuals who are not necessarily able to adapt quickly enough to the demands of their changing roles, but it also impacts on companies' performance, as individuals are at times less experienced or skilled than what is required for good performance.

The 'war for talent' (Kerr-Phillips and Thomas, 2009) is also an internal challenge for companies who struggle to retain their top talent. The mobility of top talent between organisations and even industries, results in great difficulty to maintain succession plans – managers who form part of succession plans, and as a result are part of development initiatives, can easily leave the organisation, leaving behind a gap in the company's succession plan.

1.3 PROBLEM REVIEW

In reviewing the problem in context, the following emerging themes need further consideration: derailment, leadership, gender differentiation, generation differentiation, talent management and succession planning.

1.3.1 Managerial Derailment

South Africa, while still a third world country, boasts global leaders in a number of industries: companies like Sappi, SABMiller, Murray and Roberts, Barloworld, Impala Platinum and De Beers Consolidated are considered amongst the world's best. Conversely, organisations like Eskom, the SABC and the SAPS are considered to be organisations in crisis or consistently underperforming. The difference between being an industry leader and a company in trouble is conceivably more than just technical or technological ability or a healthy market share. It can be argued that few capabilities are more important to an organisation than its leadership capability.

It could be reasoned that each of these organisations' leadership face significant pressure: well-performing organisations must maintain performance at the least, and ideally even further improve performance. And the poor-performing organisations have to affect change in order to transform their organisations to remain competitive. These key challenges all fall within the larger context of macro and micro challenges as discussed previously; and added pressure results from the current economic crisis. Even for well-performing organisations, continued success is not guaranteed.

It is therefore conceivable that leaders are faced with significant pressures, which would inadvertently impact their personal ability to manage and cope with stress, continuously work on personal development, and avoid burnout and derailment.

Many derailed executives demonstrated at least one failure or 'derailer' early in their careers, but were promoted despite it, in the belief that the developmental area would be addressed as the new position is learnt (Van Velsor and Leslie, 1995). It appears that, in these cases, developmental initiatives are relied on to address developmental issues, without necessarily having the ability to clearly identify shortcomings other than through 360° type feedback; information based on personality attributes causing derailment behaviour is not as readily available.

1.3.2 Leadership

Successful leadership is about communicating a vision, organising and motivating teams, managing effectively and pragmatic standards for success. Research into the psychological and demographic characteristics of successful leaders shows few consistent or robust relationships – successful leaders are not characterised by specific personality type, ethnicity, age or gender. Some attributes do point to success(Grant, 2008): self-awareness, self-management, social awareness and social skill. In terms of interpersonal ability, these four attributes create an interesting dynamic: self-awareness is required for self-management, and social awareness is a likely requirement for social skill and interaction. Without self-insight, little can be achieved in the sense of successful management of others.

Poor leadership is arguably not simply the absence of these skills, but instead dysfunctional dispositions and the associated behaviours degrade or neutralise the

skills and competencies of a leader (Hogan and Hogan, 2009). Technical competence does not make up for interpersonal inadequacy, and it could be reasoned that interpersonal adequacy thus not only means the absence of interpersonal skill, but also the presence of behaviours that would detract from performance. So if a leader must possess a certain set up important skills for success, he or she must also not possess the behaviour sets that could impede success.

Alternatively, it could be argued that the characteristics that detract from success, could stem from strengths that are being overused. So it is not purely a question of underusing specific skills (and hence practising them), but also learning to avoid overusing specific skills. Management writing is full of models supporting the concept that inadequate performance results from managers "underdoing" specific skills, and this focus on required skill sets is further transferred to recruitment, selection and career advancement: often newly promoted but previously successful executives struggle greatly with adjusting their skills to the requirements of a new job. For example, a useful ability to become involved in operational issues at one level could result in a reputation for micromanaging at the next level.

The concept of overdoing strengths brings about an additional facet to understanding managerial behaviour. It is not purely a question of learning to do more of a specific behaviour, but instead becomes a question of learning to balance strengths leading to that behaviour. For instance, it would be worthwhile to phrase a developmental plan as balancing a tendency towards diligence (defined by Hogan*, et al.,* (2007) as potentially perfectionistic, micromanaging and unable to delegate) as opposed to becoming more strategically oriented.

1.3.3 Gender Differentiation

Women in leadership is a popular topic in South Africa, with organisations such as the Businesswomen's Association (BWA) and the University of Cape Town Graduate School of Business's *Women in Leadership* Programme serving as examples of the focus on women in business leadership. It could however be reasoned that the focus on women in leadership could be indicative of the fact that much still has to be done to diminish the divide between women and men. Differences or perceived

differences in leadership style might amount to differences in what is considered to be acceptable or even efficient or successful leadership between the genders.

The progress of women in South African leadership positions mirrors that of the global context: women are seeing increased representation in leadership roles, but the increase in numbers is slow and often limited to certain environments or job roles. Women make up 52% of the South African adult population, and 41% of the workforce; however, they hold only 7% of directorships. 3% of chairs of boards are female, with 2% of CEOs (Lewis-Enright, Crafford and Crous, 2009). Women are internationally greatly underrepresented in top leadership positions and overrepresented at the bottom of the most influential leadership hierarchies; women account for about a third of MBA classes, but only 2% of Fortune 500 CEOs; and not one female featured in a recent *Fortune* magazine survey of the twenty-five highest-paid CEOs in Europe (Kellerman and Rhode, 2007).

There is an alternative, more optimistic view. *Fortune* magazine has an annual category that honours the *50 most powerful women*, and alongside that also publishes an annual report on the *25 highest-paid women* (Fortune, 2010a; Fortune 2010b). *Top Women In Business and Government* is a South African organisation dedicated to the empowerment of women, and offers similar publications on women in business (TWBA, 2010). Whilst this is questionably not an indication of the equality of the genders in business, it does indicate a growing awareness of the contribution of both genders in the business arena. However, debatably, the existence of categories for males, females and combined groups indicate some distinction between the genders, and what is seen as success for them. It could also be reasoned that the focus on women in leadership, compared to less media coverage of what it means to be a man in leadership, could point to the still present inequality – not necessarily only in the positions of women in organisations, but also in the perceptions of what is acceptable and successful behaviour for each of the genders.

The equality of the genders, and inequality of recognition and opportunities (for example development opportunities) are all issues that have arguably not been resolved. As women become a more prominent presence as managers and

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executives in organisations, the possibility of differences in managerial style becomes a key question. If these differences exist, it is necessary to understand them: the benefits and downside to gender difference. Conceivably difference could lead to conflict; however, a key issue would be to establish the extent of potential differences, and the extent to which these should be acknowledged and incorporated into development and succession programmes.

It is however reality that males and females work together in most corporates, and women are increasingly occupying a greater proportion of the workforce. Differences between the genders are multitude: men are stereotypically physically stronger and more aggressive, and as a result, it is more acceptable for them to be assertive in work contexts. Females are supposedly more sensitive, socially skilled and willing to co-operate rather than compete. These stereotypes can be the cause of great frustration to individuals, and sources of conflict and stress for co-workers if an individual does not adhere to the expected stereotypes. The question can therefore be asked whether gender differences due to socialisation, genetics and other factors can also lead to variations in typical derailment behaviour.

Lewis-Enright *et al.,* (2009) offer that organisations need to change their cultures and retention strategies in order to overcome some of the barriers that women face and become better able to tap into the pool of available female talent – not only as part of social fairness, but as a critical resource of competitive advantage for companies.

Gender differences could potentially pose complexities for those responsible for coaching and development, and if part of development is to improve skills to avoid derailment, understanding likely derailment behaviour, and whether it fits within an expected pattern or not, could likely be beneficial for a development process.

1.3.4 Generation differentiation

The workforce is faced with a continuously changing demographic. A growing number of older workers, females and dual-career couples are transforming the workforce, alongside forces like globalisation and information technology. Generational groups have shared life experiences due to world and environmental events, and the specific experience of these events are unique to their ages. It is

therefore conceivable that their shared contexts and mutual experiences could lead to some common personality or behavioural traits as a result. Shared characteristics could imply mutual skill sets or shared developmental areas, which could arguably be significant for organisational development drives and succession planning as these managers are groomed to move up the ranks.

It can be reasoned that the effects of derailment would become more serious as a person advances his or her career, as they would have more responsibility (and therefore incorporated risk) as well as freedom of action. A benefit of understanding potential trends in derailment across career progression (and therefore across life span) could be that it highlights risk for managerial progression as depicted by Drotter, Noel and Charan's (2001) leadership pipeline: generational differences in management style could translate into generational differences in derailment. When one considers that some authors see derailers as 'strengths being overused' or 'virtues that become obstacles' (Hogan, *et al.,* 2007; Kaplan and Kaiser, 2006, Shambaugh, 2008; Girrell, 2004), not only can the potential benefits of derailment be leveraged more beneficially within a manager's context, but the potentially destructive derailment behaviour of generations of managers could conceivably be lessened through targeted development practices across organisations.

Emotional intelligence, judgement and wisdom could be argued to develop as a person matures and ages. Through mentoring, training and self-insight and self-development, individuals are able to address behavioural and interpersonal insufficiencies, resulting in improved relationships and performance. It is therefore possible that derailment behaviour is a fluid construct that changes at least to some extent, across life stages.

If development and experience could be shared or similar for individuals sharing the same background, experiences and environment, as with different generational groups, arguably these generations could produce distinctive tendencies towards derailment and the manner in which these behaviours are exhibited.

1.3.5 Talent Management

South Africa ranked 48th out of 55 nations in the World Competitiveness Report (IMD, 2009) on overall competitiveness, and 30th on Business Efficiency. Organisations that are intent on becoming more competitive must rely on talented and dedicated employees (Kerr-Phillips and Thomas, 2009). Succession planning and development practices often focus on improving the existing strengths of an organisation's talents or high potentials in order to optimise competitiveness. Also understanding the behaviour that derails them would add a further dimension to these practices. However, derailment in one organisation does not have to mean the end of a manager's career. It is possible for these individuals to leave an organisation in which they derailed for an industry or environment better suited to their unique talents and needs, where they are more successful. Trends within industries could therefore be useful in order to highlight potential matches between organisations and individuals.

Understanding the unique attributes of managers in South Africa in relation to the global arena is important for companies expanding into the international market, as well as companies engaging in secondments and transfers of individuals. Understanding the similarities and differences between South African managers and their worldwide counterparts should assist companies in creating development processes, leadership pipelines and even identifying appropriate high potential managers across borders, or based on individual needs.

Coaching remains a popular method of developing managers and preventing potential derailment, and uses many of the principles of psychology. It is arguably one of the most strategic approaches in business when it comes to talent management, as it has the ability to enhance strengths and establish skills previously absent or weak (Maritz, Poggenpoel and Myburgh, 2009). It provides intellectual and emotional support and development to managers, avoiding derailment and better equipping individuals to deal with the complexities of modern business. The adaptation of coaching and development methodologies for the South African context could be seen as a strategic imperative for those responsible for talent management in South African organisations.

1.3.6 Psychometric assessment

Using a psychometric instrument as part of the development process to predict behaviour can supply valuable information not gleaned in interviews or performance reviews. Psychometric assessments provide valid and reliable information, more so than interviews or other techniques, and this research aims to provide additional depth to the predictive value of psychometrics in identifying and managing derailment behaviour in managers. Comparing similarities and differences in derailment behaviour across demographics as well as comparing incidence of derailment with international counterparts, could improve the choice of development and selection processes of managers, resulting in more effective and efficient placement and advancement of individuals.

1.4 PROBLEM STATEMENT

Managerial derailment in South Africa is a relatively new but growing field of interest. The themes from previous chapters highlight a complexity related to managerial derailment within a South African context. These themes combine to create a topic for the research.

The problem statement:

Managerial derailment behaviour is differentiated across gender and generation groups in South Africa.

1.5 OBJECTIVES

The objectives of this study are:

- To identify the occurrence of derailers amongst South African managers
- To identify generational differences, if any, in derailers amongst South African managers
- To identify gender differences in derailers, if any, amongst South African managers

1.6 IMPORTANCE OF THE RESEARCH

Managerial derailment is successfully measured across the world, in particular in first world countries across Europe and the USA. This enables the prediction and management of this behaviour to harness the positive attributes found in the underpinning behaviour, while potentially avoiding the destruction that could follow if derailment is left unchecked or remains misunderstood. Companies benefit in reduced costs associated with derailment, and individuals benefit from stronger career pathing and interpersonal relationships. This research explores the incidence of derailment for South African managers.

1.7 ASSUMPTIONS AND LIMITATIONS

The use of the Hogan Development Survey (HDS) offers the advantage that it is a standardised psychometric instrument, normed for use in South Africa. Further, up until the end of 2008, approximately 750 000 respondents have completed the HDS across the world (Hogan and Hogan, 2009). This offers results than can easily be quantified and compared.

A limitation of this study is the sole focus on HDS results, without additional comparison against performance data or other forms of feedback from organisations or individual practitioners. Whilst this aspect was considered, the study relies on the proven predictive validity of the instrument.

A further limitation is that the research can only provide insight into the likelihood of derailers occurring, but does not provide insight into how these derailers will be exhibited by different individuals, generations or genders.

Finally, the research explores the concept of development to decrease the risk of derailment, to a limited extent.

1.8 OVERVIEW OF THE REPORT

Chapter 2 will highlight relevant business theory related to derailment, and offer an exploration of models to provide further information on derailment and the strategic value of incorporating derailment development systems into current talent management and leadership pipeline processes.

Chapter 3 provides a literature review of current theory and use of derailment, as well as clarification on the concepts gender and generations within the South African context. **Chapter 4** will explain the research methodology and reliability and validity of the instrument used in this quantitative study. **Chapter 5** is the discussion of the results, and **Chapter 6** concludes the study.

1.9 SUMMARY

Chapter 1 reviewed the background to derailment behaviour, and linked this to the current local and international context. Key themes emerging from the background are the need for developmental processes to incorporate derailment behaviour, and an understanding of the unique requirements of managers in the South African context. This theme will be further interrogated in Chapter 2 in order to develop a theoretical framework for the study.

CHAPTER 2: RELEVANT BUSINESS THEORY

2.1 INTRODUCTION

In Chapter 1 several themes emerged. In South Africa, with its unique context and background, managerial derailment differences between generations and gender could potentially exist. In this Chapter, theory on managerial derailment will be highlighted that is relevant for the purposes of this study. The aim is to conceptualise the derailment characteristics as used in the research conducted. Current models will be used firstly to discuss effective leadership and management, and then an integration with derailment follows.

2.2 COMPETENCE IN LEADERSHIP OR MANAGEMENT

Kaiser (2005) creates context for preparing for future leadership needs in terms of the organisational context within the larger business environment. And within the organisational context, development systems for individuals play a key role. The relationships between the key variables in this dynamic are depicted in **Figure 1: Key considerations in building a leadership pipeline (Kaiser, 2005).**
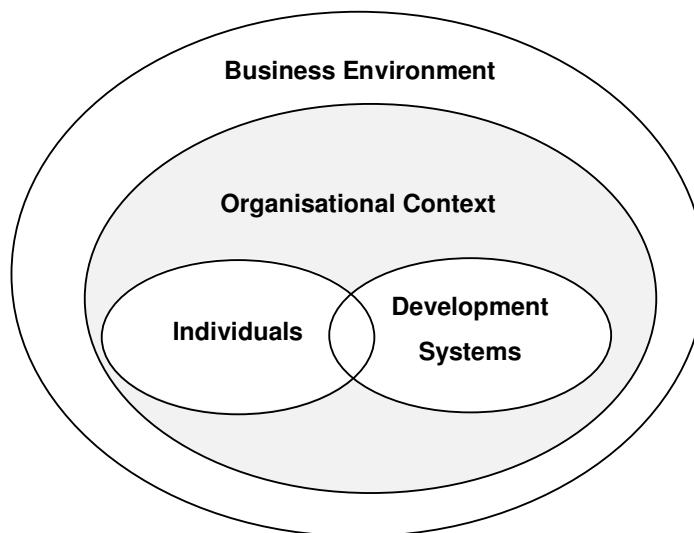
Figure 1: Key considerations in building a leadership pipeline (Kaiser, 2005)

The need for development systems that address the needs of individuals within the context of the organisational requirements or demands they face, is strategic in nature. Development systems to allow individuals to grow into key role players for

their company's strategies focus provide competitive edge and continued prosperity for an organisation. These systems cannot be only focused outward, though. If an approach is not integrated with the wants and needs of individuals, it is unlikely that employees will be neither engaged nor motivated to achieve the goals of both the development systems and the company's strategies. Similarly, the development system cannot be only focused on the individual, without considering the organisation's business context, as this could create development programs not necessarily guided by strategic requirement, but by individual aspiration.

Generic development plans serve to improve the competencies that organisations have identified as required for their managerial ranks; in other words, they address the organisational context. They do not, however, offer tailored interventions based on individual requirements, contexts and preferences. Generic plans therefore do not always cater for the individual.

Filling the leadership pipeline is a new priority in most organisations (Kaiser, 2005; Kates and Downey, 2005). Leonard (2005) comments on the content of development efforts in many organisations: in an effort to create leaders out of managers, companies in their haste often overlook fundamental management skills such as delegation and project management. The result of this practice is that leaders often enter advanced positions without the fundamental skills of management. Leonard (2005) cautions that development plans need to be designed for specific organisational levels, as a generic approach is ultimately shortsighted.

Kotter (1998) makes a clear distinction between leadership and management, as does Allen and Kuter (2009), who rates management as equally as important as leadership, but states that the distinction between management and leadership is quite difficult for the average leader or manager. The terms management and leadership are used interchangeably for this study. It is not because of an assumption that leadership and management are identical in nature, but rather because of the view that these functions share similarities and overlap to create an appropriate mix for success in an organisation (McCartney and Campbell, 2006).

Figure 2 offers a platform to interrogate how competency in management or leadership could combine for success. For instance, a leader with high managerial skill but low leadership skill will be seen as a candidate for development; similarly, high leadership skills with low managerial skill allow room for development. Simply put, having one strength in hand allows for development of that which is still outstanding. Successful combination of skills incorporate both managerial and leadership ability. Moderate to low ability in both categories could lead to derailment, according to this model. It could be postulated that derailment in this sense occurs because an individual does not have the ability or skill to cope with the demands of a leadership or management role. This skill gap might go unseen in the early stages of an individual's career, as they have, for example, moderate managerial skill. Once the individual reaches positions that require some leadership skill into the required combination, the individual might be taxed beyond what they can deliver, and derailment may occur.
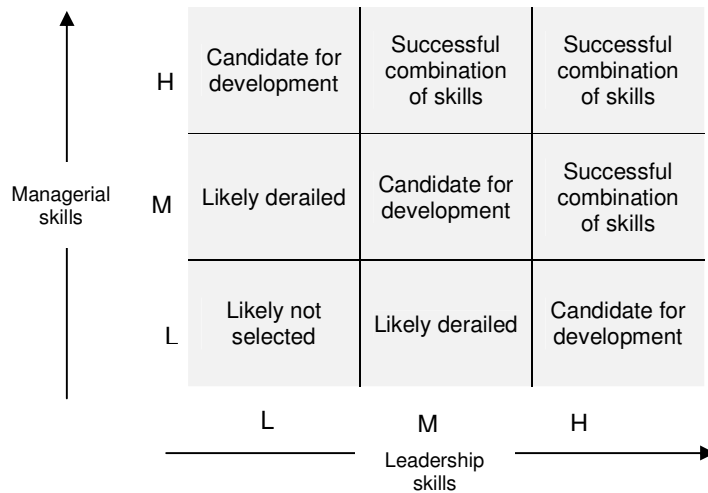
Figure 2: Model of individual success and failure (McCartney and Campbell, 2006)

The optimal mix of skills required for success may change as an individual moves vertically or horizontally in an organisation. Further, a certain qualifying level of skill must be present in each of the two areas for an individual to be selected for a leadership/management role or to avoid premature derailment. A further point of importance from this model is that development is not only necessary for managers already derailing or close to derailing – development is also a requirement for high potential managers to avoid future derailment. This would allow deficiencies to be

identified early on in a leader's career, with associated development plans to increase opportunities for success.

Hogan and Warrenfeltz (2003, in Hogan and Hogan, 2009) propose a model that integrates managerial competence into four domains: intrapersonal skills, interpersonal skills, technical skills and leadership skills (Figure **3**). The domains form an overlapping developmental sequence, with later skills depending on the appropriate development of the earlier skills.

This links with the model by McCartney and Campbell (2006) in that certain competencies overlap, and is carried over in the progression from management to leadership. The domains as proposed by Hogan and Warrenfeltz (2003, in Hogan and Hogan, 2009) also can be trained within a hierarchy, where earlier skills are harder to train than later skills. The relationship between the HDS scales, personality and motives scales, and competency domains is depicted in Figure **3** below. Definitions are provided in Appendix 1.
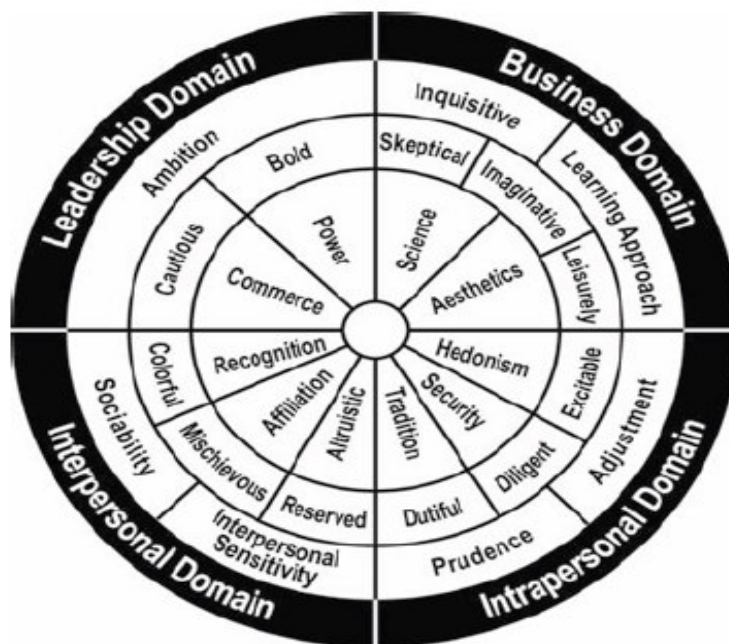
Figure 3: Domain Model of Organisational Performance (Hogan and Hogan, 2009)

The underlying theme of the model highlights from the middle specific motivators or values, and based on these drivers or individual motivators, they fit into specific

performance domains. However, over these drivers or motivators, derailers appear that create obstacles for managers to overcome. The outer layer of the model touches on personality traits used in attaining success.

Two components underlie the **intrapersonal** domain: self-esteem and resilience (people with core self-esteem are self-confident, even-tempered and positive; resilient individuals bounce back from setbacks quickly) and self-control (self-controlled people are conforming and socially appropriate). In the **interpersonal domain**, the focus is on building and sustaining relationships. People with good skills here are socially adept, approachable and rewarding to deal with. **Technical skills**, while included in most models of performance, can be taught, but are dependent on being able to deal with other people. Interest in training and acquiring new knowledge is essential to this domain. The **leadership skills** domain concerns building and maintaining effective teams, and can be broken into recruiting, retaining and motivating teams, developing a vision, and finally being persistent.

Each competency domain therefore carries positive personality traits, healthy values or motivators, and the derailing behaviour. The value of this model is in its ability to organise performance and highlight not only a focus on developing the positive skills, but also developing individuals' ability to cope with derailment. A further complexity is introduced in this model: that personality attributes that are considered to be strengths, could be overused, causing derailment. Strengths that guide a manager or leader to success in the initial phases of his or her career, could therefore either be developed even further for future success, or could be overused and lead to derailment.

The concept of earlier skills forming the foundation of later skills, but being harder to train is also found in Drotter, Noel and Charan's (2001) theory on the leadership pipeline. The pipeline (**Figure 4**) illustrates a series of passages or turns that are to be successfully navigated as a manager's career progresses. Initial phases involve managing the self first, and then other individuals with increasing scope and responsibility. Freedman (2005:25) asserts that "when upwardly mobile persons are promoted from lower, individual contributor roles to higher, managerial roles, they

are confronted by the challenge of negotiating a series of ... crossroads ... or shifts in their careers".

Enterprise Manager

Passage 5

Group Manager

Passage 6

Business Manager

Passage 3

Functional Manager

Passage 4

Manage Manager

Passage 1

Manage Others

Passage 2

Manage Self
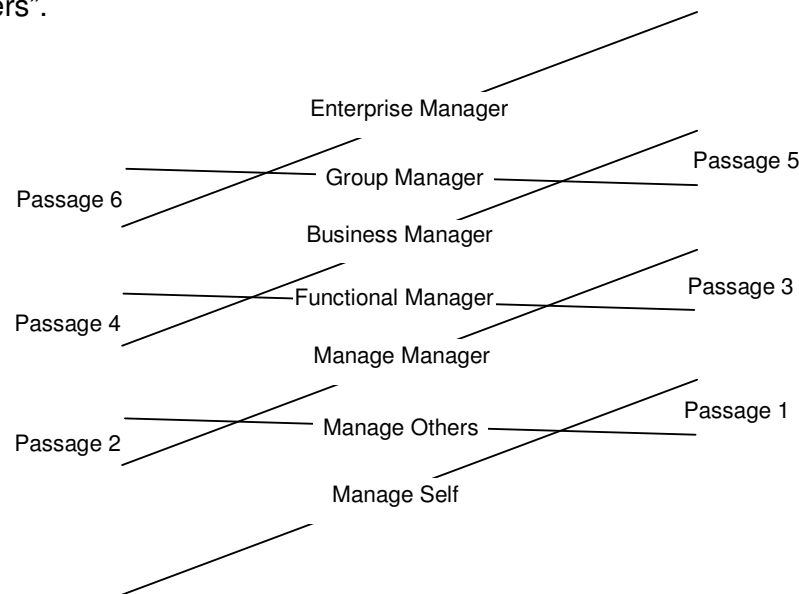
Figure 4: The Leadership Pipeline (Drotter, Noel and Charan, 2001)

As individuals progress through these passages, the complexity increases. A first promotion therefore would require of a professional to move away from managing only own performance, to overseeing the performance of others. Considering the previous competency domain discussed, this first transition for example brings about a shift from a purely intrapersonal focus to an interpersonal focus, plus the first level of complexity for management: understanding the interpersonal dynamics in relation to the context in which the individuals function, and seeing the bigger picture involving performance, finance and human resources, amongst other components.

Each passage or transition will require that a manager deals with previously unknown demands, likely to impact on their self-confidence as they navigate problem-solving in an unfamiliar environment. Managers in transition must recognise and respond to the demands and responsibilities of each higher-level position, and to ensure effectiveness, must be ready to alter beliefs, perspectives, attitudes, relationships, and behaviour patterns at each crossroad (Freedman, 2005). Freedman (2005) further states that few organisations feel that they are successful in preparing upwardly mobile persons to assume more senior roles; most companies seem to hold the implicit belief that it is acceptable for new managers to either sink or swim in their roles.

This development system is inefficient, as it places the responsibility to make a successful transition with each individual. Freedman (2005) holds that major upward transitions move managers out of their comfort zone, triggering strong emotional responses as confidence and competence must be gained again in a new role where opportunities to perform well-practiced tasks diminish. It holds that these crossroads or transition periods hold great potential for derailment. Kates and Downey (2005) confirm that making the transition to the general manager role is fraught with difficulty, and it is at this point that successful careers derail most often.

2.3 DEVELOPMENT PROCESSES

Mentoring is critical to managerial success in modern organisations. Having multiple mentors is strongly correlated with high promotion rates (de Janasz *et al.,* 2003 in Groves, 2006). Mentoring has long been a popular developmental approach to developing high potential managers, but the effectiveness of these programs is largely dependent on the quality of the relationship, type of program, and manner in which the program is developed and maintained (Groves, 2006).

Develop pervasive mentoring relationships	Identify and codify leadership talent	Assign developmental activities	Identify and codify leadership talent

• Contribute to the Mentor network
  ○ Mentor direct reports *and* high potentials from other work units
• Career planning
• Strengths/areas of improvement
• Leadership Competency Development
	• Multiple methods to identify high potential managers
	  ○ Committee
	  ○ Survey tool
	  ○ Coding system
	• Assess managerial bench strength
	• Avoid heir apparent designation
		• Internal courses and workshops taught by managers
		• Action learning projects facilitated by managers
		• Stretch assignments
		• 360degree assessments
		• Executive coaching
		
		Enhance high potentials' visibility
		• Expose leadership talent through organisation-wide forums
		• Leadership academy
			• Consider a diverse pool of candidates; not only direct reports
			• Consider opportunities to enhance diversity
			• Board engagement

Reinforce an organisational culture of leadership development

• Strong CEO commitment to Leadership Development Programs
  ○ Active participation in teaching courses and facilitating action learning projects
• Managerial performance appraisal and reward process
  ○ Identify and develop high potentials
  ○ Succession planning progress as performance criterion

Figure 5: Role of active manager participation in an integrated leadership development and succession planning process (Groves, 2006)

Various points within the process allow for assessment of strengths and areas of improvement (highlighted, **Figure 5**). Identifying potential developmental areas for candidates beforehand will enable mentors and coaches to implement bespoke developmental plans into the mentoring process. A final area of focus should be the assessment of improvement. Measurement of progress could take the form of a 360 degree assessment, to measure not only self-report feedback, but also reputational feedback from colleagues.

A standard leadership program may be the best investment for high potentials, who would benefit most from these types of programs (Leonard, 2005). However, some remedial programs may need to be offered for those managers who are derailing. One model of development does not fit all; different challenges require different skills, and leaders must go through a personal, transformational change at each of the career crossroads (Leonard, 2005).

Maritz, Poggenpoel and Myburgh (2009) state that developing management is at the heart of Southern African progress. Unique pressures are created by the coming together of different cultures in the workplace and the number of unskilled workers who need to be developed quickly. The authors also name the pressure to perform in the context of globalisation as a pressure in the South African context (Maritz, Poggenpoel and Myburgh, 2009). Without support and intervention, Van Jaarsveld (2004, in Maritz, Poggenpoel and Myburgh, 2009) offers that the prevention of managerial degeneration should be a corporate priority, as managers can derail at enormous cost to themselves, their companies and the economy.

Organisational Development (Fields, 2009) is a long-term planned effort that focuses on improvement of the processes used by members of the organisation. Such a program focuses on improving organisational functioning through work teams and groups. Despite having a long-term orientation, these programs tend to be implemented as organisational problems arise. A benefit of these programmes though is that they can target processes at different levels of the organisation, from individual to the entire organisation (Fields, 2009).

Gender stereotypes have been one of the most enduring stereotypes (Durik, *et al.,* 2006). Attention to specific emotion, however, reveals a more complex pattern. Durik, *et al.,* 2006 highlight that women are seen to be more likely than men to display communal emotions such as empathy, and men are seen as more likely than women to display self-oriented emotions like anger and envy. Similarly, women are believed to express love, sadness and fear more easily than men, and men are believed to express anger more often than women (Durik, *et al.,* 2006). Other emotion, like amusement, contempt, disgust, interest and jealousy, are not stereotyped. Further research quoted by Durik, *et al.,* (2006) offer that stereotypes ascribed to men reflect their greater power, and similarly, stereotypes ascribed to women reflect their lesser power.

One approach to the study of leadership is the Leader-Member Exchange (LMX) Theory (Milner, *et al.,* 2007). This model emphasises the exchanges between leader and follower. Milner, *et al.,* (2007) conducted research using the LMX to examine the impact of gender on the leader-member exchange, and found that men experience a more positive leader-member exchange relationship under male supervision, and females experience a more positive leader-member exchange relationship under female supervision. Different patterns of exchange between the two gender groups could indicate different acceptable behaviour patterns, especially when considered in conjunction with the gender stereotypes regarding acceptable expression of emotion.

A modern trend in leadership theory is the movement away from the concept of one person as leader, toward the concept that leadership resides in the relationship between individuals (MacNeil, 2006). This highlights the movement of leadership focus from individual to group over the past number of years. Leadership focuses to an extent on authority (influence and decision-making power), which is honed and learned in the context of practising leadership (MacNeil, 2006). This implies a focus on learning and applying new skills in the work environment. Phelan (2005) cautions that an intergenerational leadership program is important. Dries, Pepermans and De Kerpel (2008) offer six career types, and their research point to differences between these career types based on generation.

Specifically, Dries, Pepermans and De Kerpel's (2008) results point to the Silent Generation and Baby Boomers, as well as Generation Y attaching significantly more importance to organisational security than Generation X.

A leadership focus that has shifted from the individual to the group and their interpersonal relationships, along with a multigenerational work force, implies that some attention should be paid to the different generations' view of job satisfaction, job security and as a result, the need to tailor behaviour according to an environment, rather than change the environment to suit preferred behaviour.

2.4 SUMMARY

In this chapter, relevant business models were used to explore the difference and similarities between the requirements for managers and leaders. Further, potential risk for derailment in terms of career progression has been discussed using the leadership pipeline, and the place and purpose of development for derailment within an integrated leadership development and succession planning process, explained. These constructs will be taken further into the literature review (Chapter 3) in order to develop a broader theoretical framework.

CHAPTER 3: LITERATURE REVIEW

3.1 INTRODUCTION

Chapter 3 aims to provide an overview of current available literature on the topic of managerial derailment, as well as theoretical information on generational studies and gender differences.

3.2 LEADERSHIP

Derailment varies in scale and degree from psychopathy (Babiak and Hare, 2006) to regular people 'acting out' under stressful circumstances. Babiak and Hare (2006) describe individuals whose grandiosity, sense of entitlement and lack of personal insight lead to conflict and rivalry, and their impulsivity lead them to repeating these dysfunctional behaviours despite intervention and training. Conning, abuse, deceit and bullying therefore become part of these individuals' behavioural portfolios. The authors (Babiak and Hare, 2006) further bring a concerning insight: not only do these attributes go undetected in most job interviews, but at times appear attractive in job applicants – charm, social and verbal skill can mask darker personality traits, and easily fool even experienced interviewers. Pathology within the corporate environment exists, but this is at one extreme end of the continuum. Destructive behaviour is however not limited to these individuals: regular individuals with the best of intentions, training, values and abilities also derail when experiencing stress, illness or complacency. At the other end of the continuum therefore are people who exhibit destructive behaviour at times of difficulty, before reverting back to more productive behaviour.

Derailment within this context holds serious consequences for individuals in terms of their ability to successfully manage careers and relationships. Individual differences in performance and work style exist based on experience, genetics, personality, context, education and other environmental forces. Differences in derailment behaviour also exist, necessitating a broader understanding of derailers and the way they play out in the work environment, for anyone who needs to recruit new members into their teams.

Managers who derail can cost their companies over twenty times an executive salary, both due to direct and indirect costs (Gentry, Mondore and Cox, 2007), and in extreme cases millions in losses or fines.

The focus on good leadership can be seen as rooted in a view that any other form of behaviour is not leadership (Higgs, 2009). Within this lies the association of leadership with a position and by a focus on the extrinsic outcomes of either the characteristics or behaviours of the leader; for example, if it is unethical or immoral, it cannot be described as leadership (Higgs, 2009). Alimo-Metcalfe (1995) is quoted in Higgs (2009) as critiquing this approach, because much of the decades of research on leadership focused on the behaviour of white, male, American CEOs. This statement does bring about an awareness that cultural focus, especially that of the researchers, should be taken into account when interpreting findings on managerial derailment. To survive in the knowledge economy, organisations must become focused on and capable of managing employees as their most critical resource; companies have to use people, instead of technologies, factories and capital. The talent management process should be an ongoing, holistic and proactive exercise, something that few organisations embrace, according to Schweyer (2004).

Derailment can be defined as occurring when a manager, expected to be promoted based on ability or seen to have high potential for success, is instead fired, demoted or plateaued below the levels he or she was expected to achieve (Gentry, Mondore and Cox, 2007; McCartney and Campbell, 2006; Van Velsor and Leslie, 1995; Buttner, Gryskiewicz and Hidore, 1999). Gentry, Katz and McFeeters (2009) add outright failure and burnout to this definition.

Horney (1950, in Hogan, *et al.*, 2007) provides a useful model to understand derailment behaviour. She identified ten 'neurotic needs' as the first categorisation of imperfect interpersonal tendencies. These ten needs were later summarised into three main themes:

Moving away from people	Managing feelings of inadequacy by avoiding contact with others
Moving against people	Managing self-doubt by dominating and intimidating others
Moving toward people	Managing insecurities by building alliances

Figure 6: Main themes in derailment (adapted from Horney, 1950, in Hogan, et al., 2007)

These three themes were used as a first step in classifying performance risk (derailment behaviour) across eleven performance risks that interfere with an individual's ability to build relationships and create teams. These counterproductive behaviours negatively influence careers, relationships and life satisfaction. The derailers will be seen in situations where the person is not actively managing his or her public image, such as stressful situations, change, multitasking, accomplishment, complacency or poor person-job fit. Table **1** provides a list of the derailers, as well as the clusters or themes they fit into, according to Horney's theory (Hogan*, et al.,* 2007).

The eleven scales used on the HDS are summarised as follows:

Main theme	Scale	Theme
Moving away from	Excitable	Moody and hard to please; intense, but short-lived enthusiasm for people, projects or things
	Skeptical	Cynical, distrustful, and doubting others' true intentions
	Cautious	Reluctant to take risks for fear of being rejected or negatively evaluated
	Reserved	Aloof, detached, and uncommunicative; lacking interest in or awareness of the feelings of others
	Leisurely	Independent; ignoring people's requests and becoming irritated or argumentative if they persist
Moving against	Bold	Unusually self-confident; feelings of grandiosity and entitlement; overevaluation of one's capabilities
	Mischievous	Enjoying risk taking and testing limits; needing excitement; manipulative, deceitful, cunning, and exploitative
	Colourful	Expressive, animated, and dramatic; wanting to be noticed and needing to be the center of attention
	Imaginative	Acting and thinking in creative and sometimes odd or unusual ways
Moving toward	Diligent	Meticulous, precise, and perfectionistic; inflexible about rules and procedures; critical of others' performance
	Dutiful	Eager to please and reliant on others for support and guidance; reluctant to take independent action or go against popular opinion

Table 1: Summary of the Hogan Development Survey (adapted from Hogan, Hogan and Warrenfeltz, 2007)

Examples of derailment (McCartney and Campbell, 2006) include managers who demonstrate self-defeating behaviours, who have not learned from previous experience, or whose area of strength is not sufficient to offset a critical weakness in another area.

The literature shows much overlap in characteristics shared by derailed managers. In Gentry, Mondore and Cox's (2007) study, the characteristics provided by

Lombardo *et is al.* (1999) are provided. Derailed managers have problems with interpersonal relationships, difficulty leading teams, difficulty in changing or adapting, having a narrow focus, and show failure to meet business objectives. These findings are again supplied in Gentry, Katz and McFeeters (2009), who add that derailment also involves a disconnect between a person's own strengths, weaknesses and skills, with the requirements of their job.

Higgs (2009) summarises central themes of derailment: the abuse of power (to achieve personal gain), inflicting damage on others (for example bulling or coercion), over-exercise of control to satisfy personal needs (like obsession with detail) and rule breaking to serve own purposes (to an extreme of illegal behaviour). Kovach (1989) attribute causes of derailment to personality characteristics such as overly strong self-determination, inability to negotiate, insensitivity to others, coldness, arrogance, and failure to build a team. She offers that these are the strengths that had led fast-track managers to early promotions, but further on turn into weaknesses. Shipper and Dillard (2000) attribute derailment to personality flaws such as compulsiveness, untrustworthiness, overcontrolling tendencies, insensitivity and abrasiveness.

Failure to maintain positive interpersonal relationships is the most commonly cited reason for derailment (Hogan and Hogan, 2001; Gentry, Mondore and Cox, 2007; Lombardo and McCauley, 1998 in McCartney and Campbell, 2006).

In the previous chapter, the concept of derailment behaviour as strengths being overused, was introduced, (Kaplan and Kaiser, 2003; Hogan, *et al.,* 2007; Kaplan and Kaiser, 2006, Shambaugh, 2008; Girrell, 2004). Hogan and Hogan (2001) confirm the notion of overused strengths, but also suggest that derailment can be due to the presence of undesirable personality characteristics rather than the absence of desirable ones. These two views do not necessarily conflict, but instead provide different perspectives to what could cause an individual to derail. It is therefore either the presence of a strength that is overused, or the presence of undesirable characteristics, rather than the absence of an ability or desirable trait. This perspective holds significant value for development of derailing managers, as it becomes not a question of learning absent skills, but instead of learning to manage existing traits are. Some authors caution against the tendency to ignore the positive

benefits to organisations of, for example, narcissism in senior leaders (Higgs, 2009), highlighting again the potential value of the fundamental attributes of derailment behaviour.

The value of identifying characteristics associated with already derailed managers lie in the ability to identify individuals in danger of derailing, because they are exhibiting these same characteristics (Gentry, Katz and McFeeters, 2009).

Buttner, Gryskiewicz and Hidore (1999) provide evidence that gender, race and age influence self ratings in multi-rater feedback instruments, also quoting the research of Brutus, Fleenor and McCauley (1996). Related studies also indicated that characteristics of managers such as race, age, gender and personality also affect how others evaluate them, both on the part of the rater and ratee (Eagley, Karau and Makhijami, 1995; Lawrence, 1988; London and Wohlers, 1991 all cited in Buttner, Gryskiewicz and Hidore, 1999). Discrepancies between self and others' ratings in multi-rater feedback is noteworthy according to Buttner, Gryskiewicz and Hidore (1999), because of the characteristics associated with derailment is an inflated perception of own skills compared to others perceptions.

Gentry, Katz and McFeeters (2009) found that the more an individual is willing to improve, and the more others believe an individual is willing to improve, the less likely it is that superiors believe the individual displays behaviours associated with derailment. This is because the ability to realize own strengths and weaknesses is an important part of leadership, along with the willingness to improve. Those who are willing to improve want to understand why they behave in certain ways and how their strengths and weaknesses impact themselves and others. Managers who display derailment behaviour tend to neither learn from mistakes nor understand their own strengths and weaknesses (Gentry, Katz and McFeeters, 2009). Further, they do not realize if a lack of fit exists between own skills and characteristics and the requirements of the job. Development aimed at avoiding or recovering from derailment could be structured to develop both self-awareness and specific managerial skills, according to Shipper and Dillard (2000).

3.3 GENERATIONS

A generation is defined as an identifiable group, sharing birth year, location and events at critical development stages (Dries, Pepermans and De Kerpel, 2008).

By 2011 the oldest baby boomers will be 65 years old (Hedge, Borman and Lammlein (2006) and retirement will become a reality for this generation. The executive, administrative and managerial occupations are expected to experience the greatest turnover. This could result in a significant loss of managerial skills and experience, leaving a younger and less experienced generation in place to cope with the gap created.

Career progress is a concept that is integrated with social context: careers are influenced by political, economic, historical and socio-cultural developments in society (Dries, Pepermans and De Kerpel, 2008). Dries, Pepermans and De Kerpel (2008) describe an evolution from "jobs" to "experiences". D'Amato and Herzfeldt (2008) state that the concept of "job for life" is outdated: lifetime employment with a single employer is no longer guaranteed as a reward for good performance, and employees no longer rely on organisations for job security.

Most organisations are not prepared to meet the challenges associated with older workers, and according to Hedge, Borman and Lammlein (2006), little research has been done to address development and implementation of effective HR management practices specifically aimed at an aging workforce.

Hedge, Borman and Lammlein (2006) report cross-sectional studies that indicate a small positive correlation between chronological age and job satisfaction. Some researchers estimated the relationship to be quite modest, while others have posited a more complex relationship, with job satisfaction being quite high very early in a career, for example in the early twenties, lower mid twenties to early thirties, and then rising through the forties and beyond. (Hedge, Borman and Lammlein, 2006). The researchers pose a central question: how coherent and consistent is personality across time? Helson (2002, in Hedge, Borman and Lammlein, 2006) found in a longitudinal study that for both women and men, there were increases with age in several norm-adherence dimensions like self-control. Their results also suggest that

personality changes with age are very similar across culture, cohort and gender. Hedge, Borman and Lammlein (2006) further report that environmental, event-related change in personality also occurs: the researchers report a curvilinear change in dominance and independence, which peaks when most individuals attain maximum power and status.

Dries, Pepermans and De Kerpel (2008:909) define a generation as "an identifiable group that shares birth year, age location, and significant life events at critical development stages". D'Amato and Herzfeldt (2008) call this generational cohort theory: a generational cohort is defined as people born at about the same time, who experience historical events at about the same point in their development, and as a result, share similar values, opinions and life experiences.

Hedge, Borman and Lammlein (2006) suggests that cohort birth effects can create some complexity. For example, cohorts of older individuals may be more prudent because of their stricter upbringing rather than because of any maturational changes. McCrae (1999, in Hedge, Borman and Lammlein, 2006) analysed personality data from Germany, Italy, Portugal, Croatia and South Korea, based on their substantial historical differences. His hypothesis was that if similar age differences in personality could be demonstrated across five countries, the differences could not be attributed to birth cohort effects. Results showed significant differences amongst age groups across certain personality dimensions, with moderate and small differences across others. For example, conscientiousness (dutifulness) showed the largest difference. Further, differences in the age patterns for the five countries were small: in other words, differences in personality between younger and older adults were quite similar across all five counties.

Hedge, Borman and Lammlein (2006) pose a basic question: do the job and the work environment bring about change in personality, or is the effect to the opposite direction, where personality leads to choice of job and environment. Researchers have argued for both posits, for example Schneider, Smith, Taylor and Fleenor (1998) finding that personality leads to choice of job, and Roberts, Caspi and Moffitt (2003) offering evidence of the impact of the work environment on personality. Roberts, Caspi and Moffitt (2003) found that work experiences will elaborate traits

already present in personality; the implication for older generations is likely to be larger because of their longer exposure to the work environment (Hedge, Borman and Lammlein, 2006)

Four major generations have been labelled in the twentieth century, although these labels and the years they represent are not always used consistently among authors (Dries, Pepermans and De Kerpel, 2008); these generations are the Silent Generation, the Baby Boomers, Generation X and Generation Y, which combined make up the vast majority of the world's population.

Each generation is characterised by specific general values, work-related values, and an individual credo.

Generation	Birth Year	General Values	Work-related Values	Credo
Silent Generation	1925-1945	Conformism Maturity Conscientiousness Thrift	Obedience Loyalty Obligation Security (stability)	"We must pay our dues and work hard"
Baby Boomers	1946-1964	Idealism Creativity Tolerance Freedom Self-fulfilment	Challenge Workaholism Criticism Innovativeness Advancement Materialism	"If you have it, flash it"
Generation X	1965-1980	Individualism Scepticism Flexibility Control Fun	Free agency Learning Entrepreneurship Materialism Balance	"Whatever"
Generation Y	1981-2001	Collectivism Positivity Moralism Confidence Civic mindedness	Balance Passion Learning Security (not stability) Willingness to work	"Let's make this world a better place"

Table 2: Synopsis of the four generations (Dries, Pepermans and De Kerpel, 2008)

Kupperschmidt (2000) in Dries, Pepermans and De Kerpel (2008) states that employees from different generations are seen to have different value systems and react differently to common life events. It is thus well possible that people's beliefs about their careers and career success reflect their social context.

D'Amato and Herzfeldt (2008) found that younger generations are less willing to remain in the same organisation and have lower organisational commitment. Generations X and Y show stronger learning orientation and lower organisational commitment than older generations, and learning orientation predicted the intention to remain in the same organisation for Generation X.

The characteristics and work-related values of each generation are very different from one another. Older and younger employees differ in their beliefs about their psychological work contract between employees and employers, the importance of career development, as well as loyalty towards employers (D'Amato and Herzfeldt, 2008). Younger generations do not share the same loyalty, and prefer to believe that they themselves carry responsibility for their careers. This tends to make them more prepared to leave an organisation for a good opportunity, or if their needs are not being met by an employer.

In the past, job scarcity faced the workforce, but this has changed to organisations facing a talent scarcity as older generations move out of the workforce. This has lead to talented people of all generations, especially younger generations, being in great demand in organisations (D'Amato and Herzfeldt, 2008). This has brought about the "War for Talent" in the Western world (D'Amato and Herzfeldt, 2008:930). Strong competition exists amongst companies in South Africa to attract the best talent, and a key challenge for companies is to retain the existing senior talent who can contribute to organisational competitiveness (Kerr-Phillips and Thomas, 2009)

Changing demographics of the workforce point to a future shortage of younger employees and an increase in the proportion of women and older workers in the workforce (Hedge, Borman and Lammlein, 2006).

The above changes to the world of work and differences between generations highlight the need for retention as an increasingly critical resource issue. Because of the increased and large financial investments in managers, the need for retention is particularly important for these groups. Considering that managerial derailment either plateaus, halts or demotes even a high potential manager's career, a clearer understanding of derailment across generations could assist not only in prevention of

individual derailment, but with adopting a variety of bespoke tactics to retain their talent; a requirement highlighted by D'Amato and Herzfeldt (2008).

3.4 GENDER

Van Rooyen (2009) defines 'sex' as the genetic, biological division into male and female, whereas 'gender' is a sociological classification assigning roles and expectations to men and women. 'Gender' encompasses the beliefs and assumptions at individual and societal level that ultimately affect the behaviour and treatment of men and women (Van Rooyen, 2009). In developing as leaders, women have to deal with barriers caused by their own and general assumptions about their roles and behaviours. Many authors considered the different socialisation of men and women as the main reason for differences in behaviour in organisations related to gender (Fogarty, Parker and Robinson, 1998). Through the early 1990s, much of the debate as to whether female and male managers use different leadership styles, revolved around the idea that no gender differences existed. More recent studies, despite not yet offering conclusive evidence, do point toward differences in management styles related to gender (Burke and Collins, 2001; Hall-Taylor, 1997).

Hall-Taylor (1997) offers that proponents of a gender-centred approach argue that gender influences women's and men's behaviour, attitudes, traits and the like. Differences and deficits of women in management are often highlighted: women's behaviour deviates from the male norm; personality traits and behaviour patterns are contrary to the demands of managerial roles. Some authors, according to Hall-Taylor (1997) offer that females lack confidence and assertiveness, fail to undertake appropriate training to develop executive skills, are reluctant to compete for senior positions, and have lower aspirations and inappropriate expectations. Further, women fail to plan their careers, build networks and support systems, locate and maintain effective mentoring and tend to place their careers second to family. These findings remain inconclusive (Hall-Taylor, 1997, Van Rooyen, 2009). In 1965 an article in the Harvard Business Review quoted the results of a USA survey, where women were perceived as soft, emotional, dependent, uncritical, introverted and often absent from work; males were seen as strong, independent and able to deal with crises as they arose (Van Rooyen, 2009). Kellerman and Rhode (2007) confirm that gender stereotypes leave women dealing with a double standard: most

characteristics associated with leadership are masculine: dominance, authority, assertiveness. Only in recent years has the juncture between femininity and leadership lessened, and not necessarily because of more modern standards, but because women have become more willing to display the qualities associated with authority (Kellerman and Rhode, 2007). The stereotype also leaves women in a double-bind: those who do not display the qualities associated with leadership are seen as "soft" and lacking in ability; those who display the qualities associated with leadership can appear abrasive, strident and overly aggressive, where males would appear assertive in displaying those same qualities. Kellerman and Rhode (2007) quote a meta-analysis of a hundred studies that confirm that women are rated lower as leaders when they adopt authoritative and seemingly masculine styles, and particularly so when their evaluators are men.

Women have been found to see career success as a process of personal development which involves interesting or challenging work, rather than the more male-oriented view of career driven by salary and rank (Dries, Pepermans and De Kerpel, 2008). Women also tend to view acceptable work-life balance as more important than men.

A study on gender differences by Burke and Collins (2001) found that female accountants are more likely than males to indicate that they prefer transformational leadership, which is a more interactive style of management, and correlated with several management skills associated with success. This study was based on information obtained from self-report questionnaires, indicating not evidence of gender differences, but differences in self-report of differences between genders.

Research conducted by independent research organisation Catalyst on 353 *Fortune 500* companies found that the companies with the most women in top management positions provided a total return to shareholders that was 35% better than in companies with more male-centric executive teams (Shambaugh, 2008). Instead of a competition between the genders, this finding supports the notion that a more diverse spectrum of leadership perspectives and thinking improve performance, especially since women are proving themselves to be increasingly instrumental in strategy, decision making, and leadership (Shambaugh, 2008). Companies that

cultivate a broader mix of leaders will better equip themselves in a continuously evolving business environment.

Fogarty, Parker and Robinson (1998), quoting a variety of research findings supporting little difference between the genders, propose that trait-based arguments on gender differences do not offer much information: for instance, men and women do not seem to vary in ability, work-relevant personality dimensions, cognitive styles, professional and organisational commitment, values, or work-life balance. The authors note, though, that male attributes tend not to be examined, since they are assumed to parallel the essential nature of organisations, whereas female qualities are portrayed as ranging from that which is supportive but unnecessary, to that which is alien and opposite the organisation (Fogarty, Parker and Robinson, 1998). This could pit false dichotomies based on gender: rationality versus emotionality, caring versus both confidence and consistency, consensus formation versus leadership, and even zero sum and non-zero sum solutions.

Loo (2003) found in a study on gender differences related to ethical behaviour, that gender does have some effect in judging the ethics of behaviours presented in a series of vignettes to managers. Across all three of the studies, indications were that women were more ethical than men in their judgements of the behaviours presented in the vignettes. However, one study showed higher scores for men in some situations, indicating that men are more ethical than women in some situations. Loo's (2003) findings concur with many other studies (Betz, *et al.,* 1989; Glover, *et al.,* 2002; Lane, 1995; Whipple and Swords, 1992, all cited in Loo, 2003). The studies concluded that men are more ethical in scenarios where the moral intensity is extreme. In other words, men tend to show more ethical behaviour in clearly unethical or ethical environments; women fare better in the 'grey' areas where the choices are not as clear. Loo (2003) describes these differences as conservative, since the statistical differences were not significant in some of the studies.

Females perceive their effectiveness on coaching and developing, as well as communication as higher than that of males. Burke and Collins' (2001) study also suggests that female accountants receive more developmental opportunities that their male counterparts. This finding is important for derailment studies, as the ability

to be an effective leader and to achieve success in an organisation is aided in part by the opportunities for development that an individual has access to (Burke and Collins, 2001). Kovack (1989) believes that development is a key factor in avoiding derailment, and if differences in development opportunities exist between genders, this might impact on the occurrence of derailment for males and females.

The ultimate question remains, and broad generalisation does not provide an answer: do women lead differently? Individual women display different styles of leadership, just as men have done and will do (Kellerman and Rhode, 2007). Not all women in positions of leadership will behave according to a female leadership model. However, gender differences still have observable and durable implications for how an individual might come to power, prefer development during and before that role, and exhibit the required behaviour to keep them in power. Kellerman and Rhode (2007) question whether women in power set different goals to men (for example, would they be more likely to advance policies that deal with family life), whether they are more likely to occupy specific types of positions (for example HR directors), and whether they face different requirements in leadership style because of subordinate preference (for example subordinates could be uncomfortable with overtly assertive behaviour).

A point of importance in the study of derailment differences between genders, is the possible effects of the perception of derailment behaviour: if a manager is exhibiting derailment behaviour, the risk exists that the behaviour could be wrongly identified as caused by gender characteristics, and not as derailment behaviour. This in turn would impact on development, feedback and inefficient management of the derailing behaviour.

3.5 SUMMARY

Chapter 3 highlighted conflicting theory on the difference between gender and generations and their management styles, and also indicated how sparse research on derailment in South Africa is. From the literature review it is clear that no school of thought has won the debate over whether women are different to men in terms of management, or whether there should be differences between the genders. Similarly, some research findings indicate generational differences, and at the very least prove the existence of generational cohorts that share similar characteristics.

CHAPTER 4: RESEARCH METHODOLOGY

4.1 INTRODUCTION

This chapter discusses the research method employed to address the research questions of the study. The main features of the research design and research variables and defined, and the attributes of respondents are described.

Data collection methods, potential bias and limitations and delimitations are discussed, and the psychometric properties of the instrument used in the study are examined.

4.2 PURPOSE OF THE RESEARCH

Consultants who integrate psychological assessment results into selection, development or coaching processes are often faced by a difficult choice: use valid and reliable assessments from overseas, or choose from a limited range of South African assessments available on the market, often with outdated norms, some dating back to pre-1994. South African psychologists have fallen into the habit of using good quality international assessments, but "interpreting with caution" (Foxcroft and Roodt, 2007). As discussed in 4.10, the Hogan Development Survey is a valid and reliable instrument, already normed for use in South Africa. This research aims to provide consultants and other users of derailment theory an added set of data: information on how demographic factors impact on individual results.

4.3 RESEARCH APPROACH

Qualitative approaches are defined by Haslam and McGarty (2003) as procedures for studying psychological and behavioural phenomena that do not involve their quantification. Quantitative approaches generally involve the collection of primary data followed by the projecting of the results to a wide population (Coldwell and Herbst, 2004).

A quantitative approach was chosen for this study because of the ability to project the results from a sample onto the wider or general population. Some interpretation

of results will however demand a qualitative approach, resulting in research incorporating both qualitative and quantitative data.

Commonly used experimental designs are *randomised* or *true experiment*, *quasi-experimental* and *non-experimental* designs. True experiments allow the researcher to control the situation so that casual relationships between variables can be evaluated. An independent variable is manipulated and its effect on the dependent variable measured. It ensures a high level of internal validity. Quasi-experimental designs have at least one or more of the true experimental design attributes such as pre-tests, post-tests, randomisation and a reliable and valid measuring instrument. A quasi-experiment either complements key aspects of the true experimental design or finds close substitutes for these. Non-experimental designs aim to measure variables by survey through a set of questions. Surveys attempt to capture attitudes or patterns of past behaviour (Coldwell and Herbst, 2004).

The research study employed a non-experimental survey, which identifies eleven derailers, as defined in previous chapters. These derailers represent the independent variables used in the study, and were captured using a cross-sectional design. Dependent variables used are work level, gender and age.

One-group data was collected from a group of respondents in order to use as multivariate information (Coldwell and Herbst, 2004). Closed questions with "Yes" or "No" response options are allowed.

The Hogan Development Survey™ (HDS), based on the research conducted by Drs Robert and Joyce Hogan, covers eleven scales or 'derailers' (Hogan, *et al.*, 2007). Initial statistical analyses for South Africa were completed in 2009, resulting in valid itinerant norms for use on South African populations, in accordance with the requirements of the Health Professions Council of South Africa (HPCSA) and the Employment Equity Act, 1998 (Government Gazette, 2006). This was done to ensure scientifically valid and reliable psychological assessment which can be fairly applied to all employees without bias against any employee or group. Hogan *et al.* (2007) report no practical gender differences in scale scores on derailment behaviours as measured by the HDS.

4.4 POPULATION AND SAMPLE

A total database of 3415 respondents on the HDS existed as at December 2009. These respondents are all South African, and have completed the HDS as part of a selection or development process. Respondents are working adults across a number of industries.

The population of individuals who completed the HDS represent all ethnic and language groups in South Africa, with ages for respondents from 21 to 66. Information on socio-economic status is not a requirement for completing the HDS, and as such no data is available. The HDS was designed exclusively for use with adult populations, and a Grade 12 reading level is a requirement for assessment on the HDS. From the population, a sample was selected based on respondents' current level of work. Only respondents who described themselves as at a managerial level or higher, were selected for the sample.

The decision was made to omit more than 800 respondents who had not indicated work level, as well as those who had described their work level as professional, as managerial experience and tenure could not be confirmed or assumed.

The final sample consisted of 269 respondents, for whom data was available in terms of work level, age and gender. Only 7 respondents did not provide their age, resulting in a total of 262 respondents for analysis across generational groups. All respondents disclosed their gender.

4.5 DATA COLLECTION TECHNIQUES

The Hogan Development Survey (HDS) is used across different ethnic groups and industries, and data gathered by Jopie van Rooyen and Partners (Pty) Ltd. (hereafter referred to as JVR), as sole distributor of the Hogan Assessment Series in South Africa. The HDS was normed for South African use by JVR in association with Hogan Assessment Systems.

Respondents were required to complete the Hogan Assessment series for mainly selection or development purposes, either via paper-and-pencil based assessment or online platform. Results of individual assessments are maintained by Hogan

Assessment Systems on a centralised database, and respondents to the survey consent to their results being used anonymously for research purposes.

Data for this study was collected from the centralised database. Parameters of the collection were all assessments completed by South African respondents from May 2006 to December 2009. The data source for this research could be considered secondary, as it was not gathered for the purpose of this study; however, as the nature of the data is raw and was sourced from a primary source, it is managed as primary data.

The HDS has 168 items or statements to which a respondent can "agree" or "disagree". Each scale contains 14 items, scored so that higher scores represent more dysfunctional tendencies. No item overlap exists across the 11 scales. Items were screened to ensure no offensive or invasive content: no items concerning sexual preferences, religious beliefs, criminal behaviour, or attitudes toward minority groups were used (Hogan and Hogan, 2009).

International norming of the assessment was done on 109 103 adults, virtually all job applicants or incumbents (Hogan and Hogan, 2009). In South Africa, norming was done on 1720 adults, and the assessment is considered valid and reliable for use according to South African requirements (Van Zyl and Taylor, 2009).

4.6 BIAS

A main source of bias in this study is the use of itinerant rather than general norms. Data was derived in essence from a convenience sample, as only individuals in a position to be assessed for selection or development could participate. The data is therefore not fully representative of the general population, but those most likely to be assessed for managerial or professional positions within a number of industries.

4.7 DATA ANALYSIS TECHNIQUES

The statistical analysis of the data was completed by using the Predictive Analytics Software Package (PASW) Version 18 (PASW, 2009). For an explanation on the items used in the HDS, see Appendix 2.

Multivariate Analysis of Variance (MANOVA) for gender, generation, as well as each of the generations within each gender group was conducted in order to determine whether any differences exist between the groups on any of the HDS scales.

4.8 LIMITATIONS AND DELIMITATIONS

A main limitation of this study is its small sample size. Out of an initial sample of 3000 respondents, only 269 respondents qualified based on their job being at managerial level.

A further limitation of the study is the secondary nature of the initial data. Because existing raw data was used, additional information, for example the industries in which these individuals function, or tenure in management, could not be sourced.

Being the first study to investigate derailment as defined by Hogan and Hogan (2009) across gender and age in South Africa, comparative data does not exist.

4.9 ETHICAL ISSUES / CONFIDENTIALITY

When using instruments to obtain psychological results, the issue of confidentiality remains priority. Individual results used in the study were kept confidential; no information that could interfere with privacy or confidentiality was made available during the course of the research. The safety of respondents was not compromised in any way.

Consent to the assessment was not obtained directly, as the research data was obtained from a database rather than from individuals. Informed consent obtained from individuals before assessment usually includes a reference to the use of results in research processes. Results were not made available to third parties, keeping with requirements around strict confidentiality. No identifying descriptors were used.

Feedback is a requirement with psychological assessment, but the secondary nature of the interaction with results negated this need. Since the main purpose of assessment for respondents was not the research, but instead development or selection under the guidance of a registered psychologist or psychometrist, feedback

was not offered to any individual respondent by the researcher on the assumption of prior feedback, but the results of the research are available in dissertation format.

4.10   VALIDITY, RELIABILITY, GENERALISABILITY

The HDS has been proven to be a valid and reliable instrument internationally (Hogan and Hogan 2009).

HDS Scale	N	Mean	SD	Cronbach alpha	Mean Inter-item Correlation	sem_1	sem_3
Excitable	107271	2.79	2.25	.63	.12	1.37	1.75
Skeptical	107019	4.30	2.34	.63	.12	1.43	1.82
Cautious	107450	2.78	2.35	.68	.13	1.33	1.72
Reserved	107437	4.04	2.02	.57	.09	1.32	1.66
Leisurely	107126	4.49	1.98	.43	.06	1.49	1.79
Bold	106769	7.60	2.65	.67	.13	1.52	1.97
Mischievous	107151	5.65	2.56	.59	.09	1.64	2.07
Colorful	106916	7.29	2.73	.68	.14	1.54	2.00
Imaginative	106726	5.33	2.45	.61	.10	1.53	1.94
Diligent	107376	9.78	2.09	.56	.10	1.39	1.73
Dutiful	107169	8.16	2.10	.46	.05	1.54	1.86

Table 3: Descriptive Statistics, Reliabilities, and Standard Errors of Measurement for the HDS Scales (Hogan and Hogan, 2009)

Norming of the HDS for use in South Africa was completed from a sample of 1720 working adults. In order to compare SA and US results, a method called bootstrapping was employed in order to create a comparable US sample (Van Zyl and Taylor, 2009). This is the process of re-sampling from a larger group to construct a score distribution that approximates true population parameters in order to minimise potential bias caused by overrepresentation. The technique produces a more accurate parameter estimate for item and scale statistics.

The internal consistency reliabilities (Cronbach's Alpha) for SA compared to the US sample are represented in Table **4** (Van Zyl and Taylor, 2009). The results show that the internal consistency reliabilities are comparable to the US sample, and in many cases exceed them.

Scale	SA HDS	US HDS
Excitable	.72	.66
Skeptical	.67	.65
Cautious	.70	.70
Reserved	.62	.61
Leisurely	.54	.47
Bold	.63	.69
Mischievous	.59	.61
Colorful	.69	.71
Imaginative	.68	.64
Diligent	.62	.60
Dutiful	.53	.49

Table 4: SA and US Internal Consistencies (Taylor, 2009)

Scale mean comparisons between SA results and the confidence intervals for the US results is summarised in Table **5**. The results indicate higher scores on all scales except for Dutiful, providing evidence that the SA population differs from the US population (Van Zyl and Taylor, 2009). On the basis of these results, separate norms for the SA context were developed.

Scale	SA HDS	US HDS
Excitable	3.46	2.90
Skeptical	5.73	4.41
Cautious	3.75	2.89
Reserved	4.50	4.14
Leisurely	5.41	4.58
Bold	8.95	7.72
Mischievous	6.71	5.78
Colorful	7.63	7.42
Imaginative	6.24	5.45
Diligent	10.27	9.88
Dutiful	7.49	8.27

Table 5: SA and US Scale Means (Taylor, 2009)

In order to investigate the equivalence of the HDS constructs in the SA context, the SA factor structure was target-rotated to the US factor structure, and congruence coefficients calculated. For each of the scales, congruence coefficients of above 0.90

were obtained, indicating that the constructs measured by the HDS manifest in a similar way in both SA and US samples (Van Zyl and Taylor, 2009).

4.11 SUMMARY

A quantitative study was conducted, using an established psychological assessment instrument. Reliability and validity of the instrument at international and local levels were demonstrated. The research methodology, sample and data analysis techniques were further explained.

CHAPTER 5: RESEARCH FINDINGS

5.1 INTRODUCTION

Chapter 5 presents the analysis of the data collected for the study. As detailed in the previous chapter, data was extracted from a central database containing results for all South African respondents to the HDS. All participants at managerial level were selected.

The objectives of this study are:

- To identify the occurrence of derailers amongst South African managers
- To identify generational differences, if any, in derailers amongst South African managers
- To identify gender differences in derailers, if any, amongst South African managers

The demographics of the sample group is discussed first, followed by discussion on the incidence of derailment amongst managers in South Africa. This is followed by the results of the generational study, and lastly results of the gender study are presented.

5.2 DEMOGRAPHICS

Managers across industries in South Africa, who have completed the HDS were selected for the study. Table **6** provides a breakdown of the characteristics of respondents, according to gender and generation.

Generation	Total	% of total	Female	% of category	Male	% of category	Mean age
Total respondents Age: 21-66	269		113	42%	154	58%	35
Baby Boomers Age: 46-64	56	20.8%	29	52%	27	48%	50.4
Generation X Age: 30-45	180	66.9%	71	39%	109	61%	37.4
Generation Y Age: 9-29	26	9.7%	10	38%	16	62%	26

Table 6: SA Sample Results

Table **6** shows that 58% of the sample were men, and 42% of the sample were women. Generation X had the largest representation at 66.9% of the total sample, followed by Baby Boomers at 20.8% and Generation Y at 9.7%. The average age of the sample was 35 years.

5.3 INCIDENCE OF DERAILERS AMONGST SOUTH AFRICAN MANAGERS

Scores on the HDS are given as percentiles and range from 0 to 100. Scores higher than 90 are seen as high risk for derailment, and are identified as an individual's **derailers**. This means that a person's derailers are only those scales where he or she scored in the high risk category over 90. Scores below 90 are seen as moderate risk, and were not included in the research.

The means and standard deviations for the total managerial sample are shown in Table **7**. On average, the derailers with the highest mean scores were Bold and Diligent, followed by Cautious. Reserved had the lowest average. The significance of **Table 7** is that all derailers are almost equally represented within the managerial sample. In other words, all eleven derailers are present in the workforce.

N = 269		
Derailer (>90)	**Mean**	**SD**
Excitable	56.23	27.063
Skeptical	54.29	26.570
Cautious	57.22	27.425
Reserved	51.80	27.160
Leisurely	54.68	28.114
Bold	58.72	28.717
Mischievous	55.30	27.526
Colorful	53.00	29.270
Imaginative	54.07	27.914
Diligent	58.54	27.962
Dutiful	52.61	28.603

Table 7: Descriptive Statistics for Total Managerial Group

The frequency of high risk scores for the total managerial sample is presented in Table **8**. The majority of the sample (81 or 30.1%) reported having 1 derailer and a further 28.6% (n = 77) reported no high risk scores on derailment. The third highest frequency (21.2%) reported having two derailers. On average, 90% of managers

have three derailers or less, as indicated by the cumulative percent. The occurrence of 5 or 6 derailers is extremely rare, in that only 1.9% of the population fell within either category.

N = 269			
Score >90	Frequency	%	Cumulative %
0	**77**	**28.6**	28.6
1	**81**	**30.1**	58.7
2	57	21.2	79.9
3	27	10.0	90.0
4	17	6.3	96.3
5	5	1.9	98.1
6	5	1.9	100.0

Table 8: Frequency of High Risk Scores

These results can be altered graphically to illustrate the overall incidence of derailers. If the cumulative percentage is considered, only 28.6% of managers do not endorse any derailing behaviour as measured by the HDS.

Table 9: Frequency of derailment

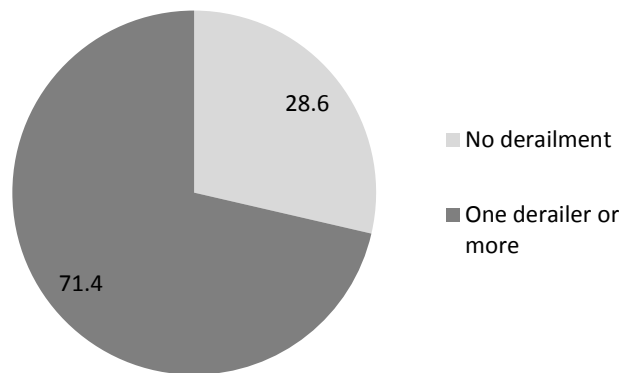Table **9** thus depicts that more than 71% of managers report having at least one derailer, with some as many as endorsing up to seven derailers.

The frequency of high risk scores per derailer is presented in Table **10**10. The derailers Bold and Dutiful appear most often for South African managers, at 19.3% incidence for Bold, and 18.2% for Dutiful. However, the occurrence of the rest of the

derailers is distributed fairly evenly. This pattern is in line with the mean scores reported in Table 7. The derailer with the lowest incidence is Reserved.

	High Risk (>90)	%
Excitable	39	14.5
Skeptical	31	11.5
Cautious	39	14.5
Reserved	13	4.8
Leisurely	31	11.5
Bold	**52**	**19.3**
Mischievous	31	11.5
Colorful	41	15.2
Imaginative	39	14.5
Diligent	34	12.6
Dutiful	**49**	**18.2**

Table 10: Frequency of High Risk Scores per Derailer

Figure 7 offers a graphical representation of the frequency of derailers. The greater tendency towards Bold and Dutiful behaviour is clearly depicted, with very low frequency on the Reserved derailer.
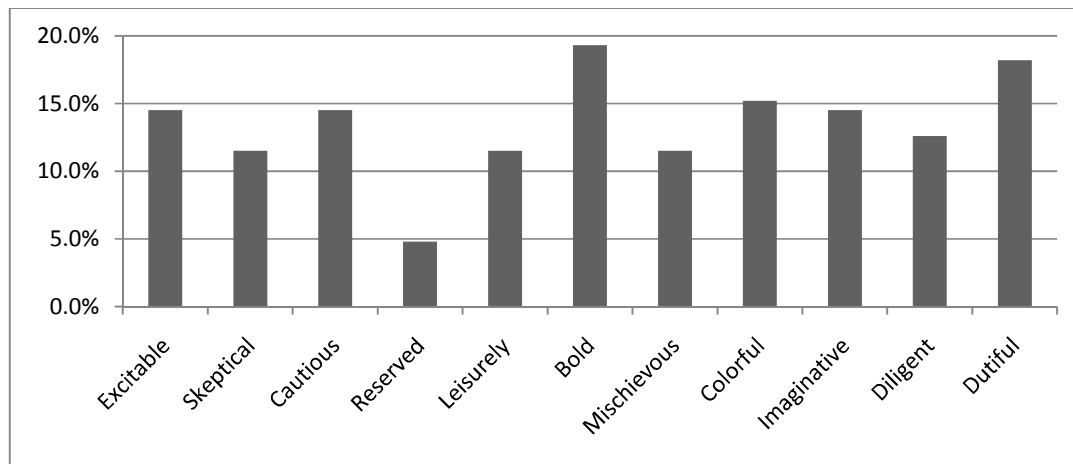

Figure 7: Frequency of High Risk Scores per Derailer

Highest risk behaviour therefore is Bold (unusually confident and reluctant to admit mistakes) and Dutiful (eager to please and reliant on others for guidance). The tendency to be aloof, uncommunicative and disinterested in others (Reserved) is particularly low amongst South African managers.

5.4 GENERATIONAL DIFFERENCES

A Multivariate Analysis of Variance (MANOVA) was conducted to investigate mean differences across generations (Table **11**). Wilks' lambda offers an assessment of the significance of a prediction, and offers a value of 1 as indicating no difference from chance, and a value of 0 indicating perfect prediction (Sapsford and Jupp, 2006). The multivariate test showed that group membership contributed meaningfully to the differences across scales (Wilks' lambda = .890, p = .128).

The analysis of variance revealed a significant difference across generation on the Dutiful derailer. Post-hoc analysis indicated that Generation Y (66.69) scored significantly higher than both Generation X (52.22) and Baby Boomers (45.82). However, the effect size for the difference as indicated by partial eta squared, showed that generation accounted for less than 1% in the overall variance in mean difference. These results showed that overall there were no meaningful differences between the generations, aside from Generation Y indicating slightly higher tendency to endorse the Dutiful factor. Standard deviations across the three generations indicated similar responding across all scales.

	Baby Boomers (N = 56)		Generation X (N = 180)		Generation Y (N = 26)		Total (N = 262)				
	Mean	**SD**	**Mean**	**SD**	**Mean**	**SD**	**Mean**	**SD**	**F**	**p**	**Partial Eta Squared**
Excitable	51.39	25.8	57.79	27.494	53.42	25.635	55.99	27.002	1.334	.265	.010
Skeptical	52.25	28.904	54.7	25.446	53.12	30.368	54.02	26.637	.196	.822	.002
Cautious	55.75	25.783	56.23	28.107	62.62	25.636	56.76	27.362	.665	.515	.005
Reserved	48.43	25.756	53.01	27.375	46.96	28.18	51.43	27.119	1.000	.369	.008
Leisurely	48.8	29.463	55.07	27.337	58.38	29.676	54.06	28.076	1.411	.246	.011
Bold	55.3	29.472	59.83	28.555	59	29.178	58.78	28.76	.527	.591	.004
Mischievous	51.7	25.213	55.99	28.012	62.12	27.272	55.68	27.403	1.323	.268	.010
Colourful	49.84	27.701	53.25	29.435	60.54	32.89	53.24	29.45	1.173	.311	.009
Imaginative	53.16	28.164	53.89	27.831	54.12	29.099	53.76	27.921	.017	.983	.000
Diligent	53.55	29.178	60.56	26.725	52.19	31.215	58.23	27.832	2.050	.131	.016
Dutiful	**45.82**	**30.188**	**52.22**	**27.848**	**66.69**	**24.669**	**52.29**	**28.493**	**4.908**	**.008**	**.037**

Note. Wilks' Lambda = .890, p = .128

Table 11: MANOVA Results for Generations

The frequency of derailers for each generation is represented in Table **12**. Results indicated some variance in derailment across generations. The derailer with the

highest percentage of high risk results for both the Baby Boomers and Generation X was Bold. For Generation Y, Dutiful was the modal derailer.

	Baby Boomers		Generation X		Generation Y	
	High	%	High	%	High	%
Excitable	4	7.1	30	16.7	3	11.5
Skeptical	8	14.3	19	10.6	4	15.4
Cautious	7	12.5	24	13.3	5	19.2
Reserved	3	5.4	9	5	-	-
Leisurely	3	5.4	22	12.2	4	15.4
Bold	10	17.9	35	19.4	5	19.2
Mischievous	3	5.4	22	11.7	6	23.1
Colorful	8	14.3	27	15	6	23.1
Imaginative	8	14.3	25	13.9	4	15.4
Diligent	5	8.9	24	13.3	3	11.5
Dutiful	8	14.3	31	17.2	7	26.9

Table 12: Frequency of Derailers Across Generation

The frequency of high risk scores for each derailer is shown graphically in Figure **8**. Statistically, little variance is present. However, if the results are interpreted qualitatively, some variance can indicate a need for further study.
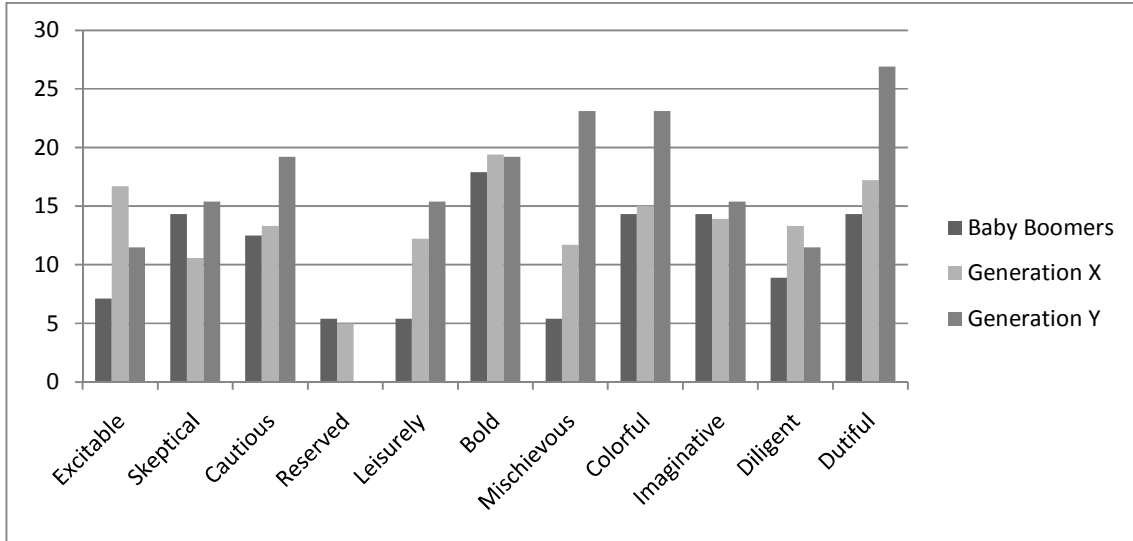

Figure 8: Frequency of Derailers Across Generations

Compared to the other generations, Generation Y tended to have the highest percentage of risk scores on a number of derailers, namely Cautious, Mischievous, Colorful and Dutiful. Generation X had higher frequencies of high risk scores on the Excitable and Bold scales.

No Generation Y managers reported high risk scores on the Reserved derailer. Generation X and the Baby Boomers also recorded significantly lower scores on the Reserved derailer in comparison to the rest of the profile.
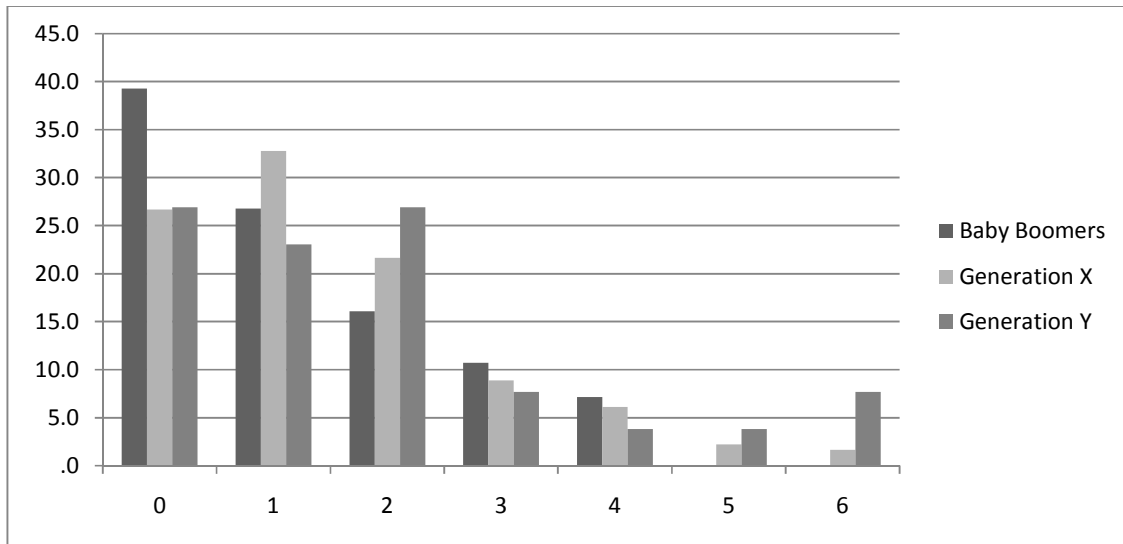
Figure **9** provides an analysis of the number of high risk scores per generation. A downward progression trend could be identified. In other words, more managers tended to have fewer rather than more high risk derailers.

The highest percentage of Generation Y managers had two derailers. Generation X managers tended to have one derailer, and the highest percentage of Baby Boomers had no derailers. This progression indicated a development related to derailment, in that the number of high risk derailers tended to decrease with an increase age.

5.5 GENDER DIFFERENCES
A MANOVA was conducted to investigate mean differences across gender (Table **13**). The multivariate test indicated that gender did not contribute meaningfully to the differences across scales (Wilks' lambda = .926, p = .044).

The analysis of variance revealed no significant differences across gender on any of the derailers. Means comparison showed that women (60.8) were slightly more likely

to endorse Cautious as a high risk derailer than men (54.2). These scores did not meet the criteria for statistical significance, however. Standard deviations for both men and women indicate similar responding across all scales.

	Men (N=154)		Women (N = 113)				Partial Eta Squared
	Mean	SD	Mean	SD	F	p	
Excitable	57.5	27.1	54.0	26.9	1.067	.30	.00
Skeptical	52.6	27.7	56.1	24.9	1.096	.30	.00
Cautious	**54.2**	**26.5**	**60.8**	**28.1**	**3.834**	**.05**	**.01**
Reserved	49.7	28.7	54.5	24.8	2.078	.15	.01
Leisurely	55.0	29.1	53.9	26.9	0.106	.75	.00
Bold	57.4	29.4	60.3	27.8	0.642	.42	.00
Mischievous	57.5	25.9	52.2	29.3	2.456	.12	.01
Colourful	54.4	29.8	51.4	28.8	0.651	.42	.00
Imaginative	52.7	27.8	55.5	28.0	0.654	.42	.00
Diligent	56.9	28.6	61.1	26.8	1.471	.23	.01
Dutiful	53.6	29.2	51.2	27.6	0.460	.50	.00

Note. Wilks' Lambda = .926, p = .044

Table 13: MANOVA Results for Gender

The frequency of derailers for each generation is presented in Table **14**. Results indicated similar patterns in derailment between the genders, with about 30% of individuals not reporting derailment behaviour as measured by the HDS, followed by 29.8% of women reporting one derailer, and 25.5% of men with one derailer. With regard to two derailers, 15.4% of women and 17.6% of men reported having two high risk behaviours.

	Female (N=188)			Male (N=290)		
	Frequency of Derailer	%	Cumulative %	Frequency of Derailer	%	Cumulative %
.00	61	32.4%	32.4%	106	36.6%	36.6%
1.00	56	29.8%	62.2%	74	25.5%	62.1%
2.00	29	15.4%	77.7%	51	17.6%	79.7%
3.00	24	12.8%	90.4%	31	10.7%	90.3%
4.00	10	5.3%	95.7%	10	3.4%	93.8%
5.00	1	0.5%	96.3%	10	3.4%	97.2%
6.00	6	3.2%	99.5%	6	2.1%	99.3%
7.00	1	0.5%	100.0%	2	0.7%	100.0%

Table 14: Frequency of Derailers Across Gender

Table 15 depicts the frequency of derailers across gender and generations. Similar trends across all three generations exist, with only slight differences for Baby Boomers around two or three derailers. 19.0% of women reported two derailers, with 9.5% of men reporting two derailers. However, only 4.8% of women Baby Boomers reported having three derailers, compared to the 16.7% of male Baby Boomers. Generation Y females recorded the largest group without derailers as measured by the HDS, at 40.9%, compared to 18.8% of male Generation Yers. A further difference is clear for Generation Y on one derailer – females have significantly lower incidence of one derailer at 13.6% compared to 25.0% for males. Lastly, females reported incidence of 9.1% for three derailers, compared to 37.5% for male Generation Yers. This points to significant differences in incidence within the groups, with Generation Y showing the most impact.

		Female				Male		
		Frequency of Derailer	%	Cumulative %		Frequency of Derailer	%	Cumulative %
Baby Boomer	.00	10	47.6	47.6	.00	19	45.2	45.2
	1.00	5	23.8	71.4	1.00	10	23.8	69.0
	2.00	4	19.0	90.5	2.00	4	9.5	78.6
	3.00	1	4.8	95.2	3.00	7	16.7	95.2
	5.00	1	4.8	100.0	4.00	2	4.8	100.0
Generation X	.00	42	29.0	29.0	.00	84	36.2	36.2
	1.00	48	33.1	62.1	1.00	60	25.9	62.1
	2.00	19	13.1	75.2	2.00	41	17.7	79.7
	3.00	21	14.5	89.7	3.00	23	9.9	89.7
	4.00	10	6.9	96.6	4.00	10	4.3	94.0
	5.00	0	.0	96.9	5.00	8	3.4	97.4
	6.00	4	2.8	99.3	6.00	4	1.7	99.1
	7.00	1	.7	100.0	7.00	2	.9	100.0
Generation Y	.00	9	40.9	40.9	.00	3	18.8	18.8
	1.00	3	13.6	54.5	1.00	4	25.0	43.8
	2.00	6	27.3	81.8	3.00	6	37.5	81.3
	3.00	2	9.1	90.9	4.00	1	6.3	87.5
	6.00	2	9.1	100.0	6.00	2	12.5	100.0

Table 15: Frequency of Derailers across Gender and Generation

5.6 SUMMARY

The MANOVA results indicated overall little significant variance across both gender and generations related to derailment. With regard to gender, no variance was reported, indicating similar derailment patterns for men and women. Generational

differences revolved around one significant difference, which is Generation Y tending to be more Dutiful that the other generations.

The final chapter provides a discussion of the results reported in Chapter 5. Implications of the results on gender and generations will be discussed, and conclusions and recommendations made.

CHAPTER 6: DISCUSSION OF RESULTS AND CONCLUSIONS

6.1 INTRODUCTION

In this chapter, the results presented in the previous chapter will be discussed. Conclusions on the implications of the findings for managers in total will be discussed first, followed by conclusions on the results based on gender. Finally, the results and implications of the findings across the generations will be discussed. To conclude, overall recommendations will be presented.

The aim of this study was to profile unique trends in derailment for South African managers, in order to ascertain whether development or intervention programs should be tailored based on overall differences between South African managers compared to their international counterparts, as well as more subtle differences between managers from both genders, as well as the three main working generations. In order to achieve this, evidence from the HDS was presented.

6.1.1 Incidence of derailment

The results of the analysis provide evidence for the first research objective. Typically, SA managers have one potential derailer present, with a number of managers not recording any high risk derailers. This does not mean that the individuals are free from potential derailment – instead, that they do not characteristically have a high risk for derailment according to a specific measure such as the HDS. Derailers totalling more than five are scarce, and should therefore be seen as significant in selection and development practices. Over 70% of managers reported having at least one derailer, indicating a significant proportion of managers who at high risk for derailment.

With a tendency towards Bold and Dutiful as most frequent derailers for SA managers, indications are that for the Bold derailer, main derailment behaviour revolves around a tendency to appear unusually self-confident and, as a result, unwilling to admit mistakes or listen to advice, and unable to learn from experience (Hogan and Hogan). This could have implications for development or mentoring programmes, as a profile like this could indicate some resistance to feedback or

coaching. Dutiful is defined as being eager to please, reliant on others for support, and reluctant to take independent action (Hogan and Hogan, 2009). Dutiful derailers at managerial level could have implication for a manager's ability to remain independent and decisive in individual decision making. The two derailers do not have shared or common characteristics, which could present added complexity in coaching or development programmes.

Further to this, characteristic of Bold behaviour is the tendency to intimidate and be feedback resistant, in contrast to the Dutiful style's more dependent style. It is possible that these two derailers could be the source of some interpersonal conflict or strain, as one style could try to dominate, just as the other seeks support. This might have an impact on communication in teams, for example, as Dutiful individuals might find it difficult to stand up to Bold individuals to make themselves heard. In addition, it could lead to unhealthy relationships, as these two styles could mutually reinforce the negative behaviour associated with their derailment.

6.1.2 Gender

The results from the analysis indicate no significant difference between men and women in terms of derailment behaviour. This implies that managers will tend to display derailment behaviours irrespective of their gender. In terms of development and intervention planning, the study indicates that separate approaches based on gender differences are not required within the SA context.

A slight difference is noted on the Cautious scale, indicating that there might be a slight tendency for women to be more Cautious as a derailment behaviour (see Appendix 1) for a description of the related behaviour. Cautious "concerns seeming resistant to change and reluctant to take even reasonable chances for fear of being evaluated negatively (Hogan and Hogan, 2009:13).

Generation Y women shows the lowest incidence of derailment in comparison with the other generations and genders. This opens up the question whether Generation Y women are more resilient and therefore less prone to derailment, or whether they simply derail in a manner not measured by the HDS.

The results of the analysis provide some evidence for the second research objective, which was to identify gender differences in derailment amongst SA managers: the research finding holds that there are no significant differences between genders in terms of managerial derailment.

6.1.3 Generations

Generation Y is the smallest contributor to the sample size, at 9.7% of the total managers in the study. This is in line with them being a younger generation, only now reaching managerial positions.

Generation X makes up 66.9% of the sample. This indicates that the majority of managerial positions are filled by individuals 30 – 45 years old. Excitable and Bold are the major derailers for this generation. Excitable (being moody and inconsistent, and being enthusiastic about new people and projects followed by deep disappointment (Hogan and Hogan, 2009)) indicates a generation of managers that might appear less emotionally stable, or slightly more volatile. Bold could indicate some resistance to feedback or coaching, and a need for independence.

One significant difference was found in a study of derailment across generations. Generation Y tends significantly more towards Dutiful than any of the other generations. Aside from Dutiful, generations appear to share common derailment characteristics.

A significantly lower frequency was identified for Reserved, which is defined as "seeming socially withdrawn and lacking interest in or awareness of the feelings of others" (Hogan and Hogan, 2009:13). Indications are therefore that South African managers do not tend to withdraw and become unavailable to their subordinates.

A decrease in the frequency of derailers across generations could be indicative of development related to derailment risk. It is possible that derailment behaviour is addressed during career progression or is reduced as a result of maturity.

The results of the analysis provide evidence for the final research objective: generational differences do exist to some extent, as derailers across generations seem to decline. If the declining incidence in derailment across generations is taken into account in leadership development and pipelining, development plans could potentially be tailored accordingly. Younger generations could receive more in-depth assistance on managing the first transition (managing self to managing others), particularly linked with the pertinent Dutiful derailer, defined by Hogan and Hogan (2009:13) as "concerning seeming eager to please, reliant on others for support, and reluctant to take independent action".

6.2 CONCLUSIONS

In Chapter 1, the problem statement guiding the research was posed as:
Managerial derailment behaviour is differentiated across gender and generation groups in South Africa.

With regard to overall incidence of derailment, the research shows a tendency towards Bold and Dutiful as derailment behaviour in South Africa. Incidence of derailment is similar to other countries, with most individuals showing at least one derailer. Some decline in number of derailers with age was found, pointing to the possibility that the tendency to derail is attended to across an individual's lifespan, potentially improving to the point of no high risk for derailment being present at a more mature age.

The results of the study indicate that there is no significant differentiation across gender or generation groups in South Africa. Slight variations do exist, mainly indicating that women might derail more towards Caution, and Generation Y tends more toward a Dutiful derailer. Overall, however, distinction cannot be made in derailment based on gender or generation group.

These findings point to the fact that there is no difference based on the type of derailer that a manger can exhibit, for example women and men are equally likely to have Excitable as a derailer. Similarly, Generation X and Y might be equally likely to exhibit a particular derailer. As stated in the limitations section, this does not provide

insight into how individuals will tend to display the behavioural characteristics of a derailer.

6.3 RECOMMENDATIONS

A finding from the study of gender differences included a slight indication that women tend to be more Cautious. As this study did not include a cultural component, a recommendation for future studies is to include some research on male – female socialisation and resulting cultural differences to investigate whether the Cautious tendency for women could be a result of external influences. Similarly, a study on Reserved and potential cultural correlations could be conducted.

A further recommendation for research on this phenomenon would be to incorporate a study on Impostor Syndrome, defined by generalised anxiety, lack of self-confidence, depression and frustration related to inability to meet self-imposed standards of achievement (Clance and Imes, 1978).

Additional research on Generation Y in management would be valuable. A focus on their first transition in the leadership pipeline, namely from managing self to managing others, correlated to the Dutiful derailer could add significant value to the understanding of derailment across career progression. The lower incidence of derailment with Generation Y women also warrants further investigation. The small sample size could have been a limited factor within this study, and deeper study into the possibility that Generation Y women are less prone to derailment could prove very insightful for further development initiatives.

Recommendations from the study for the design of development and succession plans revolve around the lack of differences in derailment across gender. Whilst much literature indicates some (healthy) differences between the genders, interventions aimed at avoiding or assisting with derailment, do not need to distinguish between men and women.

The declining frequency of derailers with progression through generations, could indicate that maturity and career development lessens the occurrence of derailment. In line with the theory of Chapter 2 discussion the foundations of derailment, this

could indicate a need for more focused or intensive developmental programs at the start of managerial careers, where derailers and associated stressors are found more frequently.

6.4 SUMMARY

The study aimed to investigate firstly the incidence of derailment in South African managers. Further, differences between gender and generation were explored, but found to be less significant overall. Finally, potential links between derailment and development plans were explored in order to combine psychological understanding and organisational planning with the purpose of strategic value add.

There is little published research available regarding derailment within a unique South African context. This study aimed to provide a starting block for further studies. Practitioners in South Africa are required to use assessments for selection and development purposes that are free from bias, and that can be applied fairly to all individuals. A unique understanding of the differences and similarities between South Africans compared to the rest of the world provides an added dimension to assist with culturally, but also contextually appropriate assessment and intervention.

If the aim of business research is to offer added value in strategic decision making, added understanding of the complexity of their human capital should assist organisations in tailoring appropriate development programmes: the benefit is not only a pure cost reduction, but also more effective and efficient, targeted interventions that benefit groups and individuals.

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8. APPENDICES

APPENDIX 1

Hogan Development Survey Scale Descriptors (Hogan and Hogan, 2009)

HDS Scale	Themes and Implications
Excitable	Moody and hard to please, with intense but short-lived enthusiasms for people and projects. High scorers are sensitive to criticism, volatile, and unable to generate respect from subordinates due to frequent emotional displays.
Skeptical	Cynical, distrustful, and quick to doubt others' true intentions. While acutely sensitive to organisational politics, high scorers are easily offended, argumentative, and ready to retaliate for perceived mistreatment.
Cautious	Reluctant to take risks or initiative due to fear of failure or criticism. High scorers are good "corporate citizens" but avoid innovation, offering opinions, taking controversial positions, or making decisions.
Reserved	Aloof, detached, uncommunicative, and disinterested in the feelings of others. High scorers work poorly in groups, are reluctant to give feedback, are insensitive to social cues, and often appear intimidating.
Leisurely	Independent, resistant to feedback, and quietly resentful of interruption or others' requests. High scorers can be pleasant but difficult to work with due to procrastination, stubbornness, and unwillingness to be part of a team.
Bold	Unusually self-confident, reluctant to admit shortcomings, and grandiose in expectations. High scorers feel entitled to special treatment, are reluctant to share credit, and can be demanding, opinionated, and self-absorbed.
Mischievous	Charming and friendly, but impulsive, non-conforming, manipulative, and exploitive. High scorers test limits, ignore commitments, take ill-advised risks, and resist accepting responsibility for mistakes.
Colourful	Expressive, dramatic, distractible, attention seeking, and disorganised. High scorers confuse activity with productivity, are unable to allow others to offer suggestions, and are intuitive rather than strategic in decision making.
Imaginative	Creative, eccentric, impractical, and idiosyncratic in thoughts and ideas. High scorers avoid details, are easily bored, lack awareness of their impact on others, and often fail to see the practical limitations of their suggestions.
Diligent	Meticulous, perfectionistic, critical, and inflexible about rules and procedures. High scorers micromanage their staff, find it hard to delegate, and have difficulty setting meaningful priorities for themselves and their subordinates.
Dutiful	Eager to please, reliant on others for guidance, and reluctant to take action independently. High scorers have difficulty making decisions on their own, may not stick up for subordinates, and promise more than they can deliver.

APPENDIX 2

The psychological nature of the instrument used, as well as copyright restraints prohibit the publication of the items of the HDS. In order to provide some information about the type of items used, an extract from the HDS Technical Manual (Hogan and Hogan, 2009:13) is provided.

Excitable
Example Item: My mood can change quickly.

Skeptical
Example Item: There are few people I can really trust.

Cautious
Example Item: It is difficult for me to be assertive.

Reserved
Example Item: I prefer spending time by myself.

Leisurely
Example Item: I ignore people who don't show respect.

Bold
Example Item: I do most things well.

Mischievous
Example Item: I have few regrets.

Colorful
Example Item: Other people pay attention to me.

Imaginative
Example Item: I am creative about my appearance.

Diligent
Example Item: I take pride in organizing my work.

Dutiful
Example Item: I leave the big decisions up to others.