

Traits and Skills Theories as the Nexus between Leadership and Expertise: Reality or Fallacy?

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The assumption that effective leaders differ in some identifiable and fundamental ways from other people is still a large part of mainstream I/O psychology. Based on a research review on the trait theory of leadership and what is known about the concept of expertise, this paper attempts to find a convergence between leader and expert traits. Results suggest that leaders and experts may share similar characteristics. However, the concept of expertise also encompasses skills theory.

Keywords: Expertise, Leadership, Personality

The complex phenomenon of leadership is a topic with universal appeal. Over the decades, it has been defined by I/O psychologists and others who study it in a number of ways. The component common to almost all definitions is that “leadership is an influence process that assists groups of individuals towards goal attainment” (Northouse, 2007, p. 12). Similarly, the definition of expertise has been the object of much debate. For the purpose of this paper, Swanson and Holton’s (2001) definition is a good fit: expertise is the combination of experience, problem-solving skills, and knowledge. To that definition, Germain (2006) adds a self-enhancement factor, which includes attributes such as extraversion, self-assurance, or charisma.

For nearly half a century, the popularity of leadership and expertise has been rising in organizations as well as in research. Both topics have been the object of a multitude of academic research articles and books chapters nationally and internationally (Bass, 1990; Germain, Vecchio, Schriesheim, Martinko, & Van Fleet, 2004). Research centers have been built and training programs have been designed to improve employees’ leadership skills and to increase their level of expertise. While the expertise and the leadership concepts have seldom been the object of comparison and contrast in the human resource development (HRD) and in the management research literature, a closer look at their respective human characteristics may help us better understand human dynamics in organizations. The purpose of this paper is to investigate the extent to which expert and leader characteristics converge, if at all. In order to accomplish that goal, a review of key research journal articles and books on the topics of leadership trait theory and expertise was performed, the result of which is presented in this paper.

Theoretical Framework

Theories of Leadership

The discussion of whether leadership is a behavior, a trait, or a skill has been ongoing. It began with an emphasis on identifying the qualities of great persons. Leadership skills were once thought to be a matter of birth: leaders were born, not made (Kirkpatrick & Locke, 1996; Cawthon, 1996). One had to be of the right breed to lead; all others had to be led. No matter the amount of yearning or learning, one’s destiny could not change. Next, research shifted to include the impact of situations on leadership. Recently, it has shifted back to reemphasize the critical role of traits in effective leadership (Bryman, 1992; Lord, DeVader, & Alliger, 1986). Today, the trait approach of leadership is alive and well. In 1991, Kirkpatrick and Locke asserted that “it is unequivocally clear that leaders are not like other people” (p. 59). They further postulated that leaders differ from non-leaders on six traits: drive, the desire to lead, honesty and integrity, self-confidence, cognitive ability, and knowledge of the business. Even more recently, Judge, Bono, Ilies, and Gerhardt (2002) found a strong relationship between Goldberg’s (1990) Big-Five traits and leadership, extraversion being the trait the most associated with it. Unequivocally, decades of research show that having certain personality traits is associated with being an effective leader.

Focus on Expertise

From a set of humble beginnings some fifty years ago, the construct of expertise was propelled as a research topic when the fields of computer science and cognitive psychology began exploring artificial intelligence and human expertise development in the mid- to late sixties. As interest in expertise grew, other areas such as education and medicine began to develop theories about knowledge acquiring and expert development. On the other hand,

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little empirical attention has been directed to the construct despite a half-century of work on the topic. This absence of empirical evidence may be the main reason of the gradual development of understanding of expertise in the last three decades (cf. Bédard & Chi, 1992). The past 15 years, however, have seen an upsurge in the pace of expertise research, as evidenced in the growing number of peer-reviewed publications in the area (Swanson & Holton, 2001). Indeed, today the development of employee expertise has been described as a strategic imperative for ever-changing organizations in a hyper competitive economic environment. Torraco and Swanson (1995) further assert that “business success increasingly hinges on an organization’s ability to use its employees’ expertise as a factor in the shaping of its business strategy” (p. 11). Although there are no distinct theories of expertise, HRD practitioners and researchers agree that this human-related construct affects many organizational outcomes.

Traits Theory and Leadership

The trait approach of leadership has a century of research to back it up. No other theory can boast of the breadth and depth of studies conducted on it (Northouse, 2007; Hunt, 1991). The strength and longevity of this line of research give the trait approach a measure of credibility that other approaches lack. Out of this abundance of research has emerged a body of data that points to the important role of various personality traits in the leadership process. The trait approach focuses exclusively on the leader, not on the followers or the situation. This makes the trait approach theoretically more straightforward than other approaches such as situational leadership or leader-member exchange (LMX) theory. In essence, the trait approach is concerned with what traits exhibit and who has those traits. It does not lay out a set of hypotheses or principles about what kind of leader is needed in a certain situation or what a leader should do, given a particular set of circumstances. Rather, this approach emphasizes that having a leader with a certain set of traits is crucial to having effective leadership. It is the leader and her or his personality that are central to the leadership process.

Traits Theory and Expertise

Since the construct of expertise may include personality traits (Germain, 2006), it is appropriate to question whether experts could, like leaders, be born. Just as the "great man" leadership theory (Kirkpatrick & Locke, 1996) was an inadequate definition of leadership, it is possible that it would also be inadequate for expertise. However, because there has been a revival of the Great Man theory in the leadership literature, it is legitimate to inquire about its applicability to the concept of expertise. Multiple studies have shown that traits and skills were attributes of expertise. For instance, self-confidence was identified by Smith and Strahan (2004) as a tendency in effective teaching and in expert teachers in general. Personality and social skills were identified as characteristics of expert college instructors (Germain, 2006). In 1993, Bédard, Chi, Graham, and Shanteau made personality traits one of their five conditions of expertise along with knowledge, cognitive skills, task characteristics, and decision strategies. Additionally, Tiberius, Smith, and Waisman (1998) believed that expertise was based on knowledge, skills, and talent. Weiss and Shanteau (2003) further asserted that it is the behavior that is or is not expert. Finally, in a comprehensive empirical study on expertise, Germain (2006) found that experts were perceived by subordinates as having evidence based and self-enhancement based characteristics. Evidence based items include knowledge, education, qualification, and training (Table 1). Self-enhancement items include subjective attributes such as ambition, drive, the ability to improve, to deduce, to assess, intuition, judgment, self-assurance, self-confidence, extraversion, and charisma (Table 2).

Table 1. *Evidence-Based Expertise Items: Theories and Components*

<i>Evidence Based Items</i>	<i>Theories</i>	<i>Component</i>
Knows work	- Definition of expertise (Swanson & Holton, 2001) - <i>Leadership</i> (Skills theory) (Mumford et al. 2000)	Knowledge
Knows field	- Definition of expertise (Swanson & Holton, 2001) - <i>Leadership</i> (Skills theory) (Mumford et al. 2000)	Knowledge
Education Qualifications Trained	- <i>Leadership</i> (Skills theory) (Mumford et al. 2000)	Knowledge

Table 2. *Self-Enhancement Based Expertise Items: Theories and Components*

<i>Self-Enhancement Expertise Items</i>	<i>Theories</i>	<i>Component</i>
Drive	- <i>Leadership</i> - Extraversion (The Big-Five (Goldberg, 1990))	Behavioral
Self-Confidence	- <i>Leadership</i> - Enterprising (Holland's Typology of Personality (1959))	Behavioral
Charismatic	- <i>Leadership</i> (Bass, 1985; 1990) - Impression Management (House, 1977)	Behavioral
Can improve	- Conscientiousness (The Big-Five (Goldberg, 1990))	Behavioral
Intuitive	- Expertise as intuition (Anderson, 1985; Dreyfus & Dreyfus, 1986) - Extraversion (The Big-Five, (Goldberg, 1990)) - Social (Holland's Typology of Personality (1959))	Problem solving skills
Outgoing	- Impression Management (Bass, 1985; Conger, 1989; Conger & Kanungo, 1988; Harvey, 2001; House, 1977). - Extraversion (from the MBTI (Myers-Briggs, 1970)). - <i>Leadership</i> (Skills Theory) (Mumford et al. 2000)	Behavioral
Ambitious	- Enterprising (Holland's Typology of Personality (1959))	Behavioral
Self-assured	- <i>Leadership</i> - Enterprising (Holland's Typology of Personality (1959))	Behavioral
Can deduce	- Expertise (Swanson & Holton, 2001) - Critical thinking skills / evaluation stage of cognitive domain in Bloom's taxonomy (1956) - <i>Leadership</i> (skills Theory) (Mumford et al., 2000)	Problem solving skills
Can judge importance	- Expertise (Swanson & Holton, 2001) - Critical thinking skills / evaluation stage of cognitive domain in Bloom's taxonomy (1956) - <i>Leadership</i> (skills Theory) (Mumford et al., 2000)	Problem solving skills
Can assess importance	- Expertise (Swanson & Holton, 2001) - Critical thinking skills / evaluation stage of cognitive domain in Bloom's taxonomy (1956) - <i>Leadership</i> (skills Theory) (Mumford et al., 2000)	Problem solving skills

Proposition: The Nexus between Leadership and Expertise

Table 3 provides a synopsis of the main leadership theories throughout the past century. It also highlights leadership findings that could apply to the concept of expertise.

Table 3. *Theories of Leadership and Similar Theories of Expertise*

Theories	Characteristics	Similar theories of Expertise
Great Man Theory 1900s	Leaders are born not made	Experts are born (Galton, 1869)
Trait Theory 1940s – 1950s	Inherited traits that are suitable (physical, personality, abilities, social skills)	Inherent traits of expertise (GEM's self-enhancement)
Behavioral theory 1950s – 1960s	Leaders can be made rather than are born <u>Role theory:</u> People subtly encourage others to act within the role expectations they have for them	Experts can be made (Staszewski, 1988) People subtly encourage others to act within 'expert' role
Contingency Theory 1960s – 1970s	Environment determines which style of Leadership is best suited for situation. No leadership style is best suited in all situations	N/A
Participative theory	3 types of decision-makers in leaders: Autocratic, democratic, laissez-faire	N/A
Situational Theory (Fiedler, 1964) (Hersey & Blanchard, 1969)	The best action of the leader depends on a range of situational factors (motivation, capabilities of followers, leader/follower relationship: Contingency theory, i.e. task oriented or relationship oriented)	The best action of the expert depends on a range of situational factors (motivation, expert/employee relationship: Contingency theory of expertise)
Transactional Theory (Burns, 1978)	People are motivated by reward and Punishment. Clear structure	N/A
Transformational Theory (Bass, 1985)	People will follow a person who inspires them. Vision and passion	People are more likely to perceive someone that inspires them as an expert (charismatic)

The “GEM self-enhancement” in Table 3 refers to Germain’s (2006) work on developing a Generalized Expertise Measure (GEM). Going a step further, Table 4 shows traits and skills that might be shared by both leaders and experts, as suggested by Stogdill (1948, 1974).

Table 4: *Stogill’s Leadership Traits and Skills (1948, 1974) and Equivalence in Expertise*

<i>Leadership Traits</i>	<i>Equivalence in Expertise</i>
Adaptable to situations	
Alert to social environment	
<i>Ambitious and achievement-oriented</i>	<i>Ambitious</i>
Assertive	
Cooperative	
<i>Decisive</i>	<i>Able to judge / assess</i>
Dependable	
Dominant (desire to influence others)	
<i>Energetic (high activity level)</i>	<i>Outgoing</i>
Persistent	
<i>Self-confident</i>	<i>Self-confident / self-assured</i>

Tolerant of Stress	
Willing to assume responsibility	
Clever (intelligent)	
<i>Conceptually skilled</i>	<i>Intuitive / Able to deduce / Able to improve</i>
Creative	
Diplomatic and tactful	
Fluent in speaking	
<i>Knowledgeable about group task</i>	<i>Knows work and field</i>
Organized (administrative ability)	
Persuasive	
<i>Socially skilled</i>	<i>Outgoing</i>

Researchers whose research focused on trait leadership found similar leader characteristics (Mann, 1959; Lord, DeVader, & Alliger, 1986; Kirkpatrick & Locke, 1991). Northouse (2007) summarized the leadership traits that are central to the trait approach theory as follows: Intelligence, self-confidence, determination, integrity, and sociability. According to Germain (2006), four of those characteristics would clearly be found in experts: intelligence, self-confidence, determination (drive), and sociability (outgoing).

Intellectual ability is positively related to leadership (Northouse, 2007). Zaccaro, Kemp and Bader (2004) found support that leaders tend to have higher intelligence than non-leaders. Having strong ability, perceptual ability, and reasoning appears to make a better leader. Also, when addressing leadership from a skills perspective, intelligence is identified as a trait that significantly contributes to a leader's acquisition of complex problem-solving skills and social-judgment skills. This is where the nexus between leadership and expertise traits is clear: experts are problem-solvers (Swanson & Holton, 2001; Germain, 2006) and are able to judge situations effectively (Germain, 2006). *Self-confidence* is another trait that distinguishes individuals who are in a leadership role. It is the ability to be certain about one's competencies and skills. It includes a sense of self-esteem and self-assurance. Leadership involves influencing others, and self-confidence allows the leader to feel assured that her or his attempts to influence are suitable. Smith and Strahan (2004) found self-confidence to be a trait exhibited by expert teachers. *Determination* is the desire to get the job done and includes characteristics such as initiative, persistence, dominance, and drive. Again, this trait is clearly a component of expertise, as defined by Germain (2006). *Sociability* is a leader's inclination to seek out pleasant social relationships. Leaders who show sociability are friendly, outgoing, tactful, and diplomatic. Social leaders have good interpersonal skills and so do experts (Germain, 2006).

What about "charisma"?

Charisma is, literally, a gift of grace or of God (Wright, 1996, p. 194). Max Weber brought this idea into the realm of leadership. He used 'charisma' to talk about self-appointed leaders who are followed by those in distress. As Gerth and Mills (1991) wrote, "such leaders gain influence because they are seen as having special talents or gifts that can help people escape the pain they are in" (pp. 51-55). Charisma has been studied as a trait (Weber, 1947) and as a set of behaviors (House, 1977; House & Baetz, 1979; House & Howell, 1992). The trait approach to charisma looks at qualities such as being visionary, energetic, unconventional, and exemplary (Bass, 1985; Conger, 1989; Conger & Kanungo, 1988; Harvey, 2001; House, 1977). According to Conger and Kanungo (1988), followers make attributions of heroic or extraordinary leadership abilities when they observe certain behaviors. In 1998, Conger and Kanungo isolated five characteristics of a charismatic leader: they have a vision, they are willing to take risk to achieve that vision, they are sensitive to both environmental constraints and follower needs, and they exhibit behaviors that are out of the ordinary. Charismatic leaders are also thought to possess outstanding rhetorical ability (Harvey, 2001, p. 253). Finally, charisma was revisited to look at its impression management behaviors or what House (1977) called "image building". Studies by Bass (1985; 1990) suggest that charismatic leaders engage in impression management to construct an image of competence, increased subordinate competence and subordinate-faith in them as leaders. The trait approach to charisma looks at qualities such as being energetic (Conger & Kanungo, 1988). Along with charismatic, "outgoing" individuals are perceived as being self-confident. It would therefore make sense that they would be perceived as more expert-like by their subordinates. This is further supported by Germain's (2006) finding that charisma is a perceived characteristic of experts.

Summary of Research Findings

Figure 1 summarizes common leadership and expertise traits based on findings in the expertise literature and in leadership theories. Clearly, some characteristics of leadership are embedded in expertise and vice versa. Hence, the nexus between expertise and leadership traits does not appear to be a fallacy.

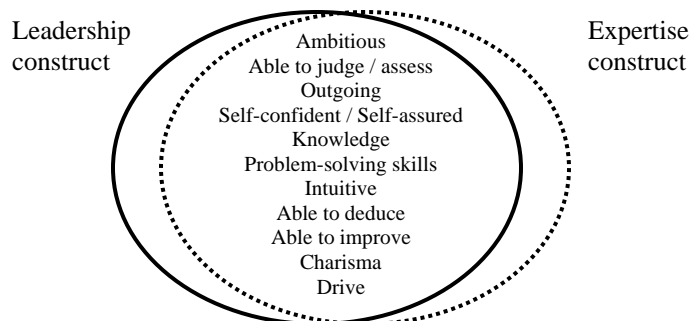


Figure 1. Common Leadership and Expertise Traits and Skills

Strengths of a Trait Theory of Expertise

The proposed trait approach of expertise has several strengths. First, it is intuitively appealing. The image in the popular press and community at large is that experts are a special kind of people –people with gifts who can do extraordinary things. The trait approach is consistent with this perception because it is built on the premise that experts are different, and their difference resides in the special traits they possess. Nonetheless, defining expertise solely with personality traits would undermine previous research findings, which assert that expertise is also a matter of skills, mainly problem-solving skills (Germain, 2006; Swanson & Holton, 2001). Mumford, Zaccaro, Harding, Jacobs, & Fleisman (2000) suggest that the three components of leadership skills theory are social judgment skills, knowledge, and problem-solving skills, the latter two being clear evidence-based components of expertise (Swanson & Holton, 2001; Germain, 2006). Expertise could therefore be a combination of traits and skills theories, as Stogdill’s (1948; 1974) leadership traits and skills classification suggests, accompanied with years of experience (Swanson & Holton, 2001).

On the other hand, one of the limitations of a trait theory is that it doesn’t have strong predictive power (Gleitman, Fridlund & Reisberg, 2004). Also, there were, prior to Judge et al.’s (2002) meta-analysis, many traits studied and many conflicting results. Additionally, it is still somewhat unclear as to why personality is associated with leadership. Finally, a trait approach may ignore a situational specificity. For instance, if a person is high on an extraversion and an openness measure, is she or he effective in all situations? Trait theory suffers from the difficulties of specifying the trait(s) that constitute effective leadership (and therefore expertise) and of explaining how much of each trait one needs in order to cope best in different situations (Hill, 1998). However, simply because we cannot define and measure the variables scientifically should not exclude them from our consideration (Maccoby, 1981).

Contributions to the field of Human Resource Development

Despite a few shortcomings, the trait approach provides valuable information about expertise. It can be applied by individuals at all levels and in all types of organizations. Although the trait approach does not provide a definitive set of traits, it does provide direction regarding which traits are good to have if one aspires to be an expert. By taking personality tests people can gain insight into whether they have certain traits deemed important for expertise, and they can pinpoint their strengths and weaknesses. Moreover, the trait approach suggests that organizations will work better if the people in managerial positions have designated expertise profiles. Also, organizations can specify the characteristics or traits that are important to them for particular positions and then use personality assessment measures to determine whether an individual fits their needs. Hence, a trait assessment could help managers determine whether they have the qualities for a lateral or vertical move in the company. It could give individuals a clearer picture of who they are as experts and how they could fit into the organizational hierarchy. In areas where certain of their traits are lacking, experts could try to make changes in what they do or where they work to increase the potential impact of their traits. Ultimately, a trait approach gives us some benchmarks for what we need to look for if we want to be experts.

Subsequently, one ought to question whether expertise traits and skills can be taught. Just as the question of whether leadership can be learned is a matter of semantics, so could it be for expertise. Nevertheless, based on previous and current findings, the question “can leadership be *learned* or can it be *taught*?” would make sense for the concept of expertise. Although there is no definite answer, some scholars concur that leadership can be taught, even though some are more specific in their beliefs and assert that only some aspects of leadership are “teachable”. Mott (2002) considers continuing professional education as a means of developing professional expertise. That

being said, effective experts seem to be individuals who are ambitious, driven, and outgoing, among other qualities. Such attributes or values seem to be intrinsic and may be “unteachable”. Others believe that even though some individuals may be better equipped to assume leadership roles, leadership training can enhance their abilities (Germain et al., 2004). They take an attributional perspective on the topic, making reference to findings in positive psychology as well as in authentic leadership. Similarly, it is expected that some attributes of expertise may be teachable and /or may be enhanced through formal education and that some individuals might be better equipped to assume expert roles. Some could argue that a trait approach to expertise may not be particularly useful for training and development because individuals’ personal attributes are largely stable and fixed, and therefore their traits are not amenable to change. Skills, however, can be taught. Problem-solving skills, social judgment skills, and knowledge are at the core of leadership skills theory (Mumford et al., 2000) and can be learned through leadership training. Consequently, careful selection and assessment of individuals may be necessary before further developing employee skills through training.

Future research should further investigate the trait approach but also focus on a skills’ approach, hence shifting the focus from personality traits to skills and abilities that can be learned and developed. This could further confirm or refute the premise that experts can learn the knowledge component of expertise (Swanson & Holton, 2001; Germain, 2006) and strengthen existing definitions for expertise. Finally, additional research is needed to find out if other leadership theories could apply to expertise. For instance, although situational theories of leadership have often been challenged (Doh, 2003), one may wonder whether experts become experts simply because they are at the right place at the right time. They may find themselves in an organization that promotes or fosters employees’ manifestation of their personality traits such as extroversion or drive. Employees that are credulous and easily impressed may also surround the so-called experts, hence nurturing their expert-like behavior. Or it is possible that they emerge at a time when an organization offers a positive climate for individuals who show expert-like characteristics, evidence or self-enhancement based? If employees can be trained to become experts, expertise training may be viewed as the teaching of skill sets that can be further developed with experience. Expertise still requires dedication and self-determination on the part of the apprentice. Human resource developers can stimulate, encourage, nurture, and expand such commitments, but the question remains: Can we create experts from whole cloth?

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