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Followership theory: A review and research agenda ☆

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ABSTRACT

While theory and research on leaders and leadership abound, followers and followership theory have been given short shrift. It is accepted wisdom that there is no leadership without followers, yet followers are very often left out of the leadership research equation. Fortunately this problem is being addressed in recent research, with more attention being paid to the role of followership in the leadership process. The purpose of this article is to provide a systematic review of the followership literature, and from this review, introduce a broad theory of followership into leadership research. Based on our review, we identify two theoretical frameworks for the study of followership, one from a role-based approach ("reversing the lens") and one from a constructionist approach ("the leadership process"). These frameworks are used to outline directions for future research. We conclude with a discussion of conceptual and methodological issues in the study of followership theory.
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1. Introduction

We have long known that followers and followership are essential to leadership. However, despite the abundance of investigations into leadership in organizational studies (Yukl, 2012), until recently little attention has been paid to followership in leadership research (Baker, 2007; Bligh, 2011; Carsten, Uhl-Bien, West, Patera, & McGregor, 2010; Kelley, 2008; Sy, 2010). When followers have been considered, they have been considered as recipients or moderators of the leader's influence (i.e., leader-centric views, Bass, 2008) or as "constructors" of leaders and leadership (i.e., follower-centric views, Meindl, 1990; Meindl, Ehrlich, & Dukerich, 1985). The study of followers as key components of the leadership process through their enactment of followership has been largely missed in the leadership literature.

We suggest that this oversight is due in large part to confusion and misunderstanding about what followership constructs are and how they relate to leadership. This confusion happens because we have not understood leadership as a process that is co-created in social and relational interactions between people (Fairhurst & Uhl-Bien, 2012). In this process, leadership can only occur if there is followership—without followers and following behaviors there is no leadership. This means that following behaviors are a crucial component of the leadership process. Following behaviors represent a willingness to defer to another in some way. DeRue and Ashford (2010) describe this as granting a leader identity to another and claiming a follower identity for oneself. Uhl-Bien and Pillai (2007) refer to it as some form of deference to a leader: "if leadership involves actively influencing others, then followership involves allowing oneself to be influenced" (p. 196). Shamir (2007) argues that following is so

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important to leadership that it negates the construct of shared leadership altogether: "leadership exists only when an individual (sometimes a pair or a small group) exerts disproportionate non-coercive influence on others" (p. xviii).

The significance of following for leadership means that our understanding of leadership is incomplete without an understanding of followership. For research in followership to advance, however, we need to identify followership constructs and place them in the context of followership theory. We address this by identifying followership theory as the study of the nature and impact of followers and following in the leadership process. It investigates followership from the perspective of a) formal hierarchical roles (e.g., followers as "subordinates") and b) followership in the context of the leadership process (e.g., following as a behavior that helps co-construct leadership). The former focuses on studying followership behaviors from a subordinate position. The latter focuses on studying following behaviors as they combine with leading behaviors to co-construct leadership and its outcomes.

We begin with a systematic review of the leadership literature from the standpoint of followers and followership. An overview of this review is presented in Table 1. In this table the headings represent views of followers and followership from a historical standpoint. The arrow figures beneath the headings show the treatment of followers according to each view. The rows show the leadership theories/approaches and which view they represent (as indicated by a check mark under the heading). Leader-centric, follower-centric, and relational views all discuss followers but not necessarily followership. Two newly emerging followership views are represented in the right-hand columns. These views represent a role-based and a constructionist approach. Role-based approaches see followership in formal hierarchical roles (e.g., subordinate). They "reverse the lens" (Shamir, 2007) to see followers as causal agents and leaders (i.e., managers) as recipients or moderators of followership outcomes. Constructionist approaches see leadership as constructed in relational interactions among people that produce leadership and outcomes (DeRue & Ashford, 2010; Uhl-Bien & Ospina, 2012). They consider followers to be active participants with leaders in co-constructing leadership, followership, and outcomes.

Following the review we identify a broad theory of followership. We offer conceptual definitions of followership and its constructs, define theoretical boundaries for the study of followership, and outline two general causal models and directions for future research. We conclude with a discussion of conceptual and methodological issues that should be considered as followership research moves forward.

2. Historical treatment of followers in leadership research

2.1. Leader-centric

The vast majority of leadership research has focused on leaders. This leader-centric approach (Hollander, 1993; Meindl et al., 1985) has contributed to a view of leaders as power-wielding actors who affect group and organizational outcomes (Yukl & Van Fleet, 1992). Stereotypes of leaders, as suggested by many definitions of "leadership," conceive of leaders as the motivating entity that moves or directs followers to action, ultimately ending in the achievement of goals (Bass, 1985). Stereotypes of followers, on the other hand, view followers as recipients or moderators of leaders' influence (Shamir, 2007) who dutifully carry out the orders, directives, and whims of the leader, without resistance or initiative (Kelley, 1988). Not surprisingly, the resultant focus has been nearly exclusively on leaders, and the vast history of research on leadership can be viewed as the study of leaders and "subordinates."

2.1.1. Taylor

We see origins of this perspective in Frederick Winslow Taylor's foundational view that managers are superior and employees are inferior (i.e., "subordinates") (Taylor, 1911, 1934). According to Taylor, because followers require direction and control, leaders must dictate the behaviors required to obtain desired outcomes (Taylor, 1947). Although Taylor acknowledges that his approach might seem tough at times, he rationalized that it is necessary and not unkind because "mentally sluggish" followers need managers who are directive (Taylor, 1947).

2.1.2. Trait approaches

Among psychologists, the earliest focus in leadership research was also exclusively leader-centric, with a search for the traits necessary for leaders to attain leadership positions (i.e., leader emergence) and to effectively move followers toward the attainment of goals (i.e., leader effectiveness) (Dinh & Lord, 2012; Hogan, Curphy, & Hogan, 1994; Stogdill, 1948). A number of traits were singled out as critical for leader emergence, including sociability–extraversion, dominance–assertiveness, and energy level (Bass, 2008; Hollander, 1985). Although the trait approach to leadership fell out of favor in the mid-20th century (Stogdill, 1948), the last two decades have seen a resurgence of interest in leader traits (e.g., Bono & Judge, 2004; Judge, Bono, Ilies, & Gerhardt, 2002). Despite this, much less attention has been paid to empirical investigation of the traits of followers or to the interaction of leader and follower traits.

2.1.3. Behavior approaches

Post World War II, studies of leadership focused on the behaviors of leaders in moving followers toward goals. Studies at Ohio State and the University of Michigan (Fleishman, 1953; Stogdill, 1950) focused on two categories of leader behavior: those that focused on the task and initiated structure into the work situation (e.g., directive and goal-oriented behaviors) and those that focused on the relationship between leaders and followers (e.g., relationship-oriented behaviors) (Judge, Piccolo, & Ilies, 2004;

Table 1
Treatment of followers in leadership research.

	Leader-centric: (followers as recipients or moderators of leader influence in producing outcomes)	Follower-centric: (followers construct leaders and leadership)	Relational view: (followers engage with l eaders in a mutual influence process)	Role-based followership: (leader as recipient or moderator of follower influence in producing outcomes)	Constructionist followership: (followers as co-creators with leaders of leadership)
Scientific management	✓				
Trait approaches	✓				
Behavior approaches	✓				
Contingency approaches	✓				
Charismatic & transformational leadership approaches	✓				
Romance of leadership		✓			
Implicit leadership theories		✓			
Social identity theory of leadership		✓			
Lord's connectionist information-processing			✓		
Weierter's charismatic relationships			✓		
Follett's *power with*			✓		
Hollander's relational view			✓		
Leader–member exchange theory			✓		
Klein & House's “Charisma On Fire”			✓		
Padilla, Hogan & Kaiser's “toxic triangle”			✓		
Followership typology approaches				✓	
Carsten's followership role orientations				✓	
Sy's implicit followership theories				✓	
Followers as shapers of leaders' actions				✓	
Followership behaviors				✓	
DeRue & Ashford's leadership identity construction process					✓
Shamir's co-production					✓
Collinson's post-structuralist identity view					✓
Fairhurst & Uhl-Bien's relational (discursive) approach					✓

Korman, 1966). Indeed, this latter category was labeled by Ohio State researchers as "showing consideration" behaviors, suggesting that leaders might motivate followers to higher levels of task performance by displaying care and concern for them. At this point, leaders were still viewed by leadership scholars as the lever that causes followers to act.

2.1.4. Contingency approaches

A major shift of leadership research occurred with what are termed situational or contingency models. Contingency theories of leadership view followers as one of the "situational" factors that leaders need to manipulate in order to gain specific outcomes (e.g., Fiedler, 1967; Hersey & Blanchard, 1977). A good example of the "imbalance" between the importance ascribed to leaders and followers is the Decision Making/Normative Theory proposed by Vroom and colleagues (Vroom & Jago, 1978; Vroom & Yetton, 1973). According to this theory, leaders are instructed to involve followers in decision-making processes, but only under specific circumstances. Otherwise, leaders are viewed as responsible for making group decisions and involving followers only to the extent that is necessary to get followers to cooperate with the chosen course of action.

2.1.5. Charismatic and transformational leadership

Charismatic leadership theory, with its emphasis on follower affective reactions to the leader, is also focused almost exclusively on the leader. Conger and Kanungo (1987, 1988) focus on the charismatic leader's displayed confidence and articulation of a vision designed to inspire followers. Another key to the success of the charismatic leader is sensitivity to followers. In recent years, some attention has been paid to the followers of charismatic leaders. For example, Shalit, Popper, and Zakay (2010) suggested that there was an interaction between charismatic leaders' motives and followers' personality characteristics.

Transformational leadership is the most popular leadership theory (in terms of garnering research attention; Bass & Riggio, 2006). Transformational leadership views leaders as instrumental in building follower commitment to achieving goals and challenging/inspiring/motivating them to perform. Transformational leaders also focus on followers' needs and ability to grow and develop—in essence, transforming the seemingly lesser valued followers into more vaunted leaders (Bass & Riggio, 2006). This theory, however, does not particularly recognize the characteristics or initiative of the followers. There is a focus on improving the quality of the leader–follower relationship, but it is still leader-centric in that it falls short of viewing followers in a broader manner.

2.2. Follower-centric

Follower-centric approaches arose in response to leader-centric views and drew attention to the role of the follower in constructing leaders and leadership. They view leadership as a social construction, and leader emergence as generated in the cognitive, attributional, and social identity processes of followers.

2.2.1. Romance of leadership

Suggesting that Western cultures are particularly prone to focusing primarily on the leader as the main element in group processes—a concept they called the "romance of leadership"—Meindl and colleagues (Meindl, 1990; Meindl et al., 1985) describe leadership as a social construction created by followers. Relying heavily on social psychological processes, they assert that the fundamental attribution error leads followers to over-attribute causality for group outcomes to the leader, who is the focal point of the group's attention (Meindl et al., 1985).

Drawing on charismatic leadership theory, Meindl (1990) also suggests that a process of "social contagion" takes place whereby followers, when stressed or excited, experience a high level of collective arousal. The contagion becomes focused on the leader, and as the group moves toward goal attainment, the leader can be imbued with charisma. This process may suggest why, during times of stress or positive upswings, followers attribute more charisma to the leader. For example, Bligh, Kohles, and Meindl (2004) describe how followers attributed greater charisma to U.S. President George W. Bush following the terrorist attacks of 9/11. Similar attribution processes can also be seen in how perceptions of President Bill Clinton's charisma seemed to increase with the economic upturn.

2.2.2. Implicit leadership theories

Follower-centric perspectives also include research on Implicit Leadership Theories (ILTs) (Eden & Leviatan, 1975; Phillips & Lord, 1981; Rush, Thomas, & Lord, 1977). ILT research proposes that followers have beliefs and schema for leader behavior that influence the extent to which they attribute effectiveness and normative evaluations such as "good" or "bad" to a leader. They use these schemas to encode leadership information, which serves as essential elements of "organizational sense making" (Weick, 1979, 1995). Followers' ILTs are formed through socialization and past experiences (Epitropaki & Martin, 2004; Schyns & Meindl, 2005), and activated in a recognition-based approach when followers match leader behavior to preexisting leader categories or prototypes they hold in memory (Lord, 1985). Referred to as "philosophies of leadership" by Schyns and Meindl (2005), ILTs are important because they influence follower ratings of leadership even when little or ambiguous information is provided about the leader's behavior (Eden & Leviatan, 1975). With respect to followers, these "folk theories of leadership" (Sivasubramaniam, Kroeck, & Lowe, 1997) help us better understand whether and when individuals are willing to follow a leader.

2.2.3. Social identity theory of leadership

Bridging follower-centric and relational views, social identity theory of leadership views leader effectiveness as dependent on followers' motivation to cooperate with the leader as well as the leader's ability to influence followers (Chemers, 2001; Hogg, 2001; Van Knippenberg & Hogg, 2003; Yukl, 2001). As a theory of intergroup behavior, the core tenet of social identity leadership theory is that people (leaders and followers alike) derive a part of their self-concept from the social groups and categories to which they ascribe belongingness—i.e., their collective self (Hogg & Reid, 2006). This identification with the group increases the strength of the group's prototype on an individual's behavior. When an individual strongly identifies with a group, or has a strong desire to be accepted, conformance to group prototypes rises in an effort to increase self-evaluation favorability.

Viewed from this perspective, leadership becomes a structural feature of groups that is produced by the processes of self-categorization and prototype-based depersonalization (Hogg & Terry, 2000). This process is consistent with a relational viewpoint (discussed next), which casts the roles of leader and follower as interdependent and embedded in a social system that is bounded by group membership (Hogg, 2001). Social identity theorists note, however, that group prototypicality might be at least as important as having characteristics widely associated with a particular type of leader. Within a group, hierarchy becomes a reward bestowed by the group on one member ("leader") by the other group members ("followers") for being the most prototypical (Hogg, 2001). In this respect social identity theory can be considered a follower-centric theory, since prototypical behaviors acceptable to the group create the boundary conditions within which the leader has permission to operate and innovate.

2.3. Relational views

The recognition that relational dynamics are important in leadership is addressed in relational approaches to leadership. These approaches view leadership as a mutual influence process among leaders and followers.

2.3.1. Lord's connectionist information-processing

Lord and Brown (2001) argue that a leader-centric perspective is problematic for the advancement of leadership research because limiting research to easily observed behaviors linked directly to outcomes ignores the underlying processes and mechanisms at the core of leadership theory. If an essential aspect of leadership is to engage and influence followers, then studying how leaders engage followers, and why followers are influenced by these actions, is necessary for understanding leadership (Lord & Brown, 2001). Assuming influence reciprocity in the relationship, we also need to study the process by which followers engage and influence the leader (Oc & Bashshur, 2013).

Asserting that the follower remains an underexplored source of variance in understanding leadership processes, Lord, Brown, and Freiberg (1999) focus on how leaders seeking to create identities are constrained by the evaluations of followers. As a result, the process of identity creation must be viewed as an intricately related mutual influence process. This notion of reciprocity of influence is acknowledged in leaders' and followers' influence on the other's self-schema, both individually and collectively (cf. Oc, Bashshur & Moore, 2013). Consistent with the earlier idea of reverse causality (Herrold, 1977; Lowin & Craig, 1968), Lord et al. (1999) describe leader behavior as "the product of a parallel constraint or of a connectionist network" (p. 193).

Taking a systems view Lord, Brown, Harvey, and Hall (2001) suggest that leadership arises from a number of interacting factors, such as context, task, and the personal qualities of both leader and followers, and that these collectively impact followers' normative evaluations of leadership. In their connectionist model, culture, the leader, and the follower all act as contextual constraints on leadership schema employed in interpreting behavioral inputs of leaders and leadership processes. Follower goals and affect are given, a priori, equal weighting to leader goals and affect in the model. Leadership then becomes the product of a social system shaped by relational and task systems that act as constraints on the range of behavioral scripts leaders deploy while simultaneously constraining the prototypes followers use to evaluate leader behaviors. Collectively this stream of research positions followers as active and dynamic agents whereby information processing and dynamic systems perspectives are needed to describe the impact of followers (Lord, 2013).

2.3.2. Weierter's charismatic relationships

Drawing from self-concept theory, Weierter (1997) considers how follower and situational characteristics influence the charismatic relationship with the leader. Adopting multiple measures of follower characteristics (follower self-concept clarity, self-monitoring, self-esteem, self-efficacy) and contextual conditions (self-awareness), Weierter (1997) proposes that follower and situational factors influence the nature of the charismatic relationship and the routinized messages delivered by leaders. In this way, he views charismatic relationships as an emergent phenomenon, not a variable to be manipulated, occurring in a reciprocal influence process between leaders and followers. The role of follower characteristics in influencing this relationship can also be seen in Shalit et al.'s (2010) findings that followers with a secure attachment style prefer socialized (i.e., unselfish) charismatic leaders, while followers with an avoidant attachment style prefer more personalized (i.e., selfish) charismatic leaders. Similarly, Ehrhart and Klein (2001) found that followers strong in participation values and low in security values are more likely to be drawn to charismatic leaders.

2.3.3. Follett's power with

The view of followers as active and dynamic agents in a reciprocal influence process can be seen in other early approaches to leadership. For example, in the earliest management research, Mary Parker Follett (1927, 1949) acknowledges the hierarchical,

position-based nature of leader-follower relationships, but objects to the idea that managers are necessarily always in charge ("order-givers") and employees are always subordinate ("order-takers"). Demonstrating insight far ahead of her time, Follett says that managers can also take orders from those below them, and that too much "pomp" is given to the ideas of *over* and *under* in discussions of managers and subordinates (Follett, 1949). Emphasizing the importance of *power with*, she argues that it is the *relationship* of the leader and followers that is essential to team success, not leaders' ability to dominate followers (Follett, 1949; Graham, 2003). Instead of seeing leaders and followers as those who command and those who obey, we need to understand that authority is an "intermingling of forces" between leaders and followers wherein a self-generating process of control is created (Follett, 1927, 1949).

2.3.4. Hollander's relational view

This intermingling of forces is also seen in Hollander's (1971, 2012) (Hollander & Offermann, 1990) relational view of leadership. Hollander was one of the first leadership scholars to recognize leadership as a relational process (1958, 1971, 1986). Criticizing leader-centric views as identifying leaders in positional terms, he pointed to the lack of attention to followers (Hollander, 1992a,b) and the problem of leaving "the *process* of leadership unattended" (Hollander & Julian, 1969, p. 389). He noted the confusion caused by the failure to distinguish leadership as a process from the *leader* as a person who occupies a central role in that process, and argued for the need to understand leadership as an influence relationship between two or more people for attainment of mutual goals in a group situation (e.g., group structure, resources, and history) (Hollander & Julian, 1969). This relationship is built over time and involves an exchange, or *transaction*, between leaders and followers. The leader provides a resource in terms of role behavior directed toward attaining group goals, and in return receives greater influence (e.g., status, recognition, esteem) contributing to the leader's legitimacy in making influence assertions and having them accepted (cf. Barnard's, 1938 acceptance theory of authority).

2.3.5. Leader–member exchange

The idea that leadership is based on a transaction or *exchange* between leaders and followers is emphasized in leader–member exchange (LMX) theory (Graen, Novak, & Sommerkamp, 1982; Graen & Scandura, 1987; Liden, Sparrowe, & Wayne, 1997). The focus in LMX theory is on how leaders and followers engage together to generate high quality work relationships that allow them to produce effective leadership outcomes (Graen & Uhl-Bien, 1995). The earliest work on vertical dyad linkage described these followers as trusted assistants to leaders who helped them meet the task-related challenges of the work unit (Dansereau, Graen, & Haga, 1975). Later work focused on how followers act as active partners to leaders when they operate in the context of high quality relationships (Uhl-Bien, Graen, & Scandura, 2000). While LMX theory does acknowledge followers in the relational process, it is still more leadership – than followership – focused in that it privileges the leader as the driver of the relationship-building process (Uhl-Bien et al., 2000).

2.3.6. Klein and House's "Charisma on Fire"

In another relationship-based perspective, Klein and House (1995) describe charisma as a relationship "between a leader who has charismatic qualities and those of his or her followers who are open to charisma, within a charisma-conducive environment" (p. 183). Calling charisma "a fire" that ignites followers' energy and commitment, they draw attention to the importance of three key elements in leadership: (1) a leader with charismatic qualities (the "spark"), (2) susceptible followers ("flammable material"), and (3) a conducive environment ("oxygen"). Klein and House (1995) identify important new questions for the study of followers. What follower characteristics predict membership in a charismatic leader-follower dyad? Are some followers more susceptible to a leader's charisma? And what is the role of social contagion in influencing the nature and consequences of charisma?

2.3.7. Padilla, Hogan and Kaiser's "toxic triangle"

The role of followers in destructive leadership is discussed in Padilla, Hogan, and Kaiser (2007). Using the concept of a "toxic triangle," they describe destructive organizational outcomes as a result of the combination of destructive leaders, susceptible followers and conducive environments. According to these authors, to understand the toxic triangle we need to move beyond leader-centric views and use a "systems perspective focusing on the confluence of leaders, followers, and circumstances rather than just the characteristics of individual leaders" (Padilla et al., 2007, p. 179).

Susceptible followers include *conformers*, who comply with destructive leaders out of fear, and *colluders*, who actively participate in a destructive leader's agenda. Though self-interest motivates both, conformers are focused on minimizing negative consequences of not going along while colluders are motivated by personal gain. The toxic triangle is complete when environmental conditions are conducive (e.g., instability, perceived threat, absence of checks and balances, destructive cultural values, institutionalized destructive behaviors). Padilla et al. (2007) call for leadership to take a less ideological and individualistic perspective and recognize the negative impacts leadership can have when destructive leaders, susceptible followers and triggering conditions combine to produce outcomes damaging to life and the larger fate of society.

2.4. Summary

What is most surprising in this review is the extent to which leadership scholars have long agreed that leadership is a process occurring in interactions between leaders and followers. We can see this as we trace the clear progression from leader-centric, to

follower-centric, to relational views recognizing leadership as a co-constructed process between leaders and followers acting in context. *It is now widely accepted that leadership cannot be fully understood without considering the role of followers in the leadership process*.

What our review also shows is that despite calls in early management and leadership research to focus on followers and followership (Hollander & Julian, 1969; Sanford, 1950), the study of followership has been mostly missing in leadership literature. As noted by Bligh (2011), over the 19-year period from 1990 to 2008 in *The Leadership Quarterly* only 14% of the articles had some version of the word follower in the abstract or title. If the search is narrowed to include the word "followership" the number is reduced to a handful of articles. This is problematic given that followership is expected to play such a crucial part in leadership. Before we can begin the process of advancing research on followership, however, we need to assess the nascent body of research on followership. Therefore, we turn now to a more systematic review of followership research, which we then use to inform development of a formal theory of followership.

3. An emerging field of followership research

Although our review shows that most research on leadership recognizes the follower in some way, the focus on followership as a research area in its own right has not occurred until very recently (Carsten et al., 2010; Collinson, 2006; Hoption, Christie, & Barling, 2012; Sy, 2010). Followership approaches are distinct from prior approaches in that they privilege the role of the follower in the leadership process. They identify followership as a topic equally worthy of study to leadership (Uhl-Bien & Pillai, 2007). A basic assumption of a followership approach is that leadership cannot be fully understood without considering how followers and followership contribute to (or detract from) the leadership process (Carsten et al., 2010; Dvir & Shamir, 2003; Hollander, 1993; Howell & Shamir, 2005; Sy, 2010).

3.1. Defining followership

The study of followership involves an investigation of *the nature and impact of followers and following in the leadership process*. The leadership process is a term used to signify a connectionist view (Lord & Brown, 2001) that sees leadership as a dynamic system involving leaders (or leading) and followers (or following) interacting together in context (Hollander, 1992a; Lord et al., 1999; Padilla et al., 2007; Shamir, 2012; Uhl-Bien & Ospina, 2012). This definition identifies followership through two lenses: followership as a rank or *position* (i.e., role), and followership as a *social process*.

The first, a role theory approach (Katz & Kahn, 1978), sees followership as a role played by individuals occupying a formal or informal position or rank (e.g., a "subordinate" in a hierarchical "manager–subordinate" relationship; a follower in a "leader–follower" relationship). The second, a constructionist approach (Fairhurst & Grant, 2010), views followership as a relational interaction through which leadership is co-created in combined acts of leading and following (DeRue & Ashford, 2010; Fairhurst & Uhl-Bien, 2012; Shamir, 2012). Whereas role-based views investigate followership as a role and a set of behaviors or behavioral styles of individuals or groups, constructionist views study followership as a social process necessarily intertwined with leadership.

Role-based approaches are consistent with Shamir's description of "reversing the lens" in leadership research (Shamir, 2007). In contrast to leader-centric approaches examining how leaders influence follower attitudes, behaviors, and outcomes, role-based followership approaches consider *how followers influence leader attitudes*, *behaviors*, *and outcomes*. These approaches identify followers as the causal agents—i.e., follower characteristics and behaviors are the independent variables, and leader characteristics and behaviors are the dependent or moderator variables (Shamir, 2007). The focus in these approaches is on follower characteristics and style, followership role orientations, implicit theories of followership, follower identities, and how follower identities and behaviors shape leader attitudes, behaviors and effectiveness (Collinson, 2006; Lord & Brown, 2004).

Constructionist approaches see followership and leadership as co-constructed in social and relational interactions between people (DeRue & Ashford, 2010; Fairhurst & Uhl-Bien, 2012; Shamir, 2007). A constructionist approach considers that leadership can only occur when leadership influence attempts or identity claims are met with followership granting behaviors (e.g., deference) or identity claims (DeRue & Ashford, 2010; see also Uhl-Bien & Ospina, 2012; Shamir, 2012). Followership is seen in "following behaviors" that can include leader and follower claiming and granting (DeRue & Ashford, 2010), deferring or obeying (Blass, 2009; Burger, 2009; Milgram, 1965, 1974), resisting or negotiating with another's wishes or influence attempts (Tepper, Duffy, & Shaw, 2001; Tepper et al., 2006), or trying to influence another to go along with one's influence attempts (Fairhurst & Uhl-Bien, 2012). In this way followership is not tied to a role but to a *behavior*. This approach allows us to recognize that managers are not always leading—they also defer to subordinates, which means they also engage in "following behaviors" (Fairhurst & Hamlett, 2003; Larsson & Lundholm, 2013).

3.1.1. Issues of semantics

These differing views are the reason behind much of the confusion in discussions of followership, and why we have had so much trouble understanding what followership is. The negative connotations of the words "follower" and "following" come from the role-based, leader-centric view that has traditionally dominated leadership research (Hoption et al., 2012). This view romanticizes leadership and subordinates followership (Uhl-Bien & Pillai, 2007). From the role-based view, the term follower has been controversial because it conjures up images of passive, powerless individuals who automatically do the leader's bidding (Kelley, 2008). It also creates confusion when those we identify as "followers" act inconsistently with the role (e.g., the Arab

Spring). As a result, some have argued for the use of the term "constituents" to signify the members of a leader's collective (e.g., Gardner, 1990; Rost, 1993). Others have suggested terms such as "collaborators," "participant" and "member/team member," and some scholars have even advocated eliminating the term follower altogether due to its negative connotations (e.g., Rost, 2008).

As Shamir (2007, 2012) indicates, however, eliminating "followers" from the leadership equation means we are no longer studying leadership. Instead we are studying social phenomena more generally, such as collaboration and teamwork. As articulated by Shamir (2007), for a social phenomenon to count as leadership it must involve "disproportionate social influence" (i.e., leading and following behaviors or identities). Shamir (2012) is careful to note that this does not mean that roles and identities of leaders and followers are fixed. Nor does it mean that leadership research should center on the leader. Rather, it means that leadership *cannot* be fully "shared" (Pearce & Conger, 2003): "If it is fully shared, I suggest we don't call it *leadership* because the term loses any added value" (Shamir, 2012, p. 487).

For a social phenomenon to qualify as leadership, therefore, we must be able to "identify certain actors who, at least in a certain…time, exert more influence than others on the group or the process" (Shamir, 2012, p. 487). The clear implication is that *followers and followership are central to leadership*, and that *the leadership process is constituted in combined acts of leading and following*. Paraphrasing Shamir (2012), we can conclude that for a phenomenon to be called leadership we must be able to identify certain actors who are willing to defer to others (i.e., to be followers or engage in following). From a followership lens, we could even argue that *it is in following that leadership is created* (Uhl-Bien & Ospina, 2012).

Returning to the distinction between role-based and constructionist approaches, role-based approaches study the follower in a hierarchical context (i.e., as a subordinate). These approaches associate leadership and followership with holding formal hierarchical positions (e.g., manager and subordinate). Constructionist approaches study followership as part of a dynamic relational process. These approaches do not start from the assumption of hierarchical position but instead consider how leadership and followership are enacted in asymmetrical relational interactions between people, which *might or might not* coincide with formal hierarchical roles (i.e., managers might not lead and subordinates might not follow).

3.2. Role-based views

Role-based views consider how individuals enact leadership and followership in the context of hierarchical roles. The primary interest of role-based approaches is in advancing understanding of how followers (e.g., subordinates) work with leaders (e.g., managers) in ways that contribute to or detract from leadership and organizational outcomes (Oc et al., 2013; Carsten et al., 2010; Sy, 2010). As such, these approaches focus on issues such as follower role orientations, follower schemas, and implicit followership theories (Carsten et al., 2010; Sy, 2010). They also investigate how follower (i.e., subordinate) traits, characteristics and styles influence leaders (i.e., managers) and leadership outcomes (Dvir & Shamir, 2003; Howell & Shamir, 2005). Role-based approaches are interested in the question: "What is the proper mix of follower characteristics and follower behavior to promote desired outcomes?" (Graen & Uhl-Bien, 1995, p. 223).

3.2.1. Follower characteristics and styles (typologies)

The earliest role-based views are provided in typologies that identify follower characteristics and styles. The first such typology was provided by Zaleznik (1965). Focusing on the dynamics of subordinacy, Zaleznik distinguished followers according to two axes: dominance–submission and activity–passivity. Dominance–submission ranges from subordinates who want to control their superiors to those who want to be controlled by superiors. Activity–passivity ranges from subordinates who "initiate and intrude" to those who do nothing. The resulting typology identifies four categories of followers: (1) impulsive subordinates, (2) compulsive subordinates, (3) masochistic subordinates, and (4) withdrawn subordinates. This typology of subordinates/followers is introduced both as a means of helping leaders better understand how to deal with followers, but also as providing direction to followers who aspire to positions of leadership. As Zaleznik and Kets de Vries (1975) state, "…the person who aspires to leadership must negotiate the risky passage between dependency and assertiveness" (p. 167).

Although Zaleznik provided the first typology, clearly the most cited early work on followership is that of Robert Kelley (1988). Kelley defined the ideal follower as participating in a joint process of achieving some common purpose (Kelley, 1988, 1992, 2008). He ascribed to "effective followers" an array of positive qualities, such as being self-motivated, independent problem-solvers, and committed to the group and organization. Effective followers "are courageous, honest, and credible" (Kelley, 1988, p. 144). Kelley's typology uses dependent–independent and passive–active as the quadrants (i.e., alienated followers, exemplary followers, conformist followers, passive followers, and a "center" group, midway on the two dimensions who are labeled pragmatist followers). These quadrants range from the stereotypical "sheep," which are passive and dependent, to "yes people" who are active, but dependent—the classic stereotype of followers who blindly follow whatever the leader dictates (Bjugstad, Thach, Thompson, & Morris, 2006; Hoption et al., 2012; Townsend & Gebhardt, 1997). Kelley advocated turning all followers into "exemplary followers," arguing that the best followers are anything but passive sheep—they are actively engaged and exhibit courageous conscience (Kelley, 1992).

Following Kelley, in 1995 Ira Chaleff published a practitioner book called *The Courageous Follower*. His premise was that the key to effective leadership is effective followership, which occurs when followers "vigorously support" leaders in pursuing the mission and vision of the organization. Effective followership requires followers who are accountable and willing to "stand up to and for leaders". He calls this courageous because followers at times will have to challenge and confront leaders with unpleasant information and critical and honest feedback. Effective followers are partners with leaders who contribute to satisfying and productive work environments by being accountable and taking a proactive approach to their role. Using axes ranging from

low-high support and low-high challenge of the leader, Chaleff identifies four different follower styles: implementer, partner, individualist, and resource (1995, 2003, 2008). His foundational premise is that "leaders rarely use their power wisely or effectively over long periods unless they are supported by followers who have the stature to help them do so" (Chaleff, 2003, p. 1).

Coming from a political science perspective, Kellerman's (2008) focus on followership divides followers into five categories based on the level of engagement of the follower. Her typology, ranging from "feeling and doing nothing" to "being passionately committed and deeply involved," results in five types of followers: isolate, bystander, participant, activist, and diehard. Kellerman's goal in this simple typology is to suggest that the critical element in followership is engagement. For example, isolates are completely detached, bystanders observe but do not participate, participants are in some way engaged, activists feel strongly about their leaders and act accordingly, and diehards are deeply committed and prepared to die for their causes. She uses this framework to argue that followers have more power and influence than they are traditionally accredited. Her interest is in focusing on how engaged followers can act as agents of change.

Jean Lipman-Blumen (2005) in her discussion of why followers so willingly obey toxic leaders suggests that there are three general categories of followers, and that these followers actually enable and support bad leaders. The first category, "benign followers," is comprised of followers who are gullible and go along unquestioningly with what a toxic leader is saying. These followers follow for pragmatic reasons, such as keeping their jobs. The second category, labeled "the leader's entourage," serves as the toxic leader's alter ego. They do this by committing to the leader's agenda. The final category, labeled "malevolent followers," includes those driven by greed, envy, or competitiveness. These followers work against the leader, and may actually have their sights set on unseating the leader to become the leader themselves.

Another typology is presented in Howell and Mendez (2008). They propose that there are different types of follower role orientations and that these influence the effectiveness of the leader–follower relationship. The first is followership as an *interactive role* that supports and complements the leadership role. This interactive role orientation can be a highly effective and dedicated follower, a relatively ineffective (Kelley's "sheep") follower, or even part of a toxic leader's loyal entourage. The second is followership as an *independent role*. This role orientation involves high levels of autonomy, and, in a positive vein, high levels of competence that complements the leader's role (e.g., high-level professionals such as engineers, physicians, university professors who work independently but contribute to the organization's goals). The third type is more negative, and comprises an *independent role* orientation that may involve a follower who works at cross-purposes to the leader. The final follower role orientation is a *shifting role*, in which the individual alternates between the leader and follower role. For example, in collaborative teams members may feel obligated to step up into a leadership role or feel that a less visible followership role is appropriate, depending on the circumstances.

3.2.2. Carsten's followership role orientations

The idea that followers can hold different types of role orientations can also be seen in newly emerging work on followership being advanced by Carsten and colleagues (Carsten, Uhl-Bien, & Jaywickrema, 2013; Carsten et al., 2010). Carsten et al. (2010) offer the first formal empirical investigation of *followers*' views of followership. Using an exploratory qualitative approach, they investigate how followers describe their beliefs regarding the ways they view and enact their roles, as well as the personal qualities and contextual characteristics they see as facilitating or impeding their ability to be successful as a follower. Their findings identify different follower schema. Some followers report more passive views, seeing their role as being obedient and deferent (e.g., "sheep," Kelley, 1992). Others report holding a proactive schema, viewing their roles as partnering with leaders by taking ownership and accountability for achieving organizational objectives (e.g., active co-contributors, Chaleff, 1995; Kellerman, 2008; Shamir, 2007).

Whether followers are able to act on their schema depends on the context (Carsten et al., 2010). Followers report that authoritarian or empowering leader style and bureaucratic or engaged climate are key factors in whether followers can enact their roles in accordance with their role orientation. When followers' schemas do not match the context, they report stress and dissatisfaction. For example, passive followers in empowering climates report stress from being asked to operate in ways inconsistent with their beliefs and style. Proactive followers with authoritarian leaders report frustration and dissatisfaction from being stifled by bureaucratic climates and procedures.

3.2.3. Sy's implicit followership theories

Sy's (2010) approach differs from that of Carsten et al. (2010) in that it investigates subordinates' as well as *managers*' views of followership. Paralleling research on implicit leadership theories, Sy (2010) advances understanding of implicit followership theories (IFTs). Managers were asked to report traits and behaviors they believe characterize followers. These were then formed into a measure of implicit followership theories (IFTs). Findings show that IFTs are most accurately represented by a first-order six-factor structure involving Industry, Enthusiasm, Good Citizen, Conformity, Insubordination and Incompetence. IFTs are also accurately represented by a second-order two-factor structure consisting of Followership Prototype (Industry, Enthusiasm, Good Citizen) and Followership Antiprototype (Conformity, Insubordination, Incompetence).

Sy's research has explored IFTs from both the leader (i.e., LIFTs) and follower (i.e., FIFTs) perspectives (however, there is more research on the former than the latter). LIFTs are important because they are associated with interpersonal outcomes of relationship quality, liking, trust and satisfaction (Sy, 2010). As shown in Whiteley, Sy, and Johnson (2012), positive LIFTs are associated with higher performance expectations, liking and LMX, which are subsequently associated with follower performance (i.e., naturally occurring Pygmalion effects). Furthermore, recent research has also found an associative relationship between affect and LIFTs in that leaders who demonstrate negative state or trait affect tend to endorse more negative LIFTs (Epitropaki, Sy,

Martin, Tram, & Topakas, 2013; Kruse & Sy, 2011). Although less attention has been paid to FIFTs, Sy's research suggests that LIFTs and FIFTs interact to affect relationship quality (Sy, 2013) and follower performance (Sy, 2011).

3.2.4. Followers as shapers of leaders' actions

A view of followers as shapers of leaders' actions can be seen in the work of Shamir and colleagues (Dvir & Shamir, 2003; Howell & Shamir, 2005; Shamir, 2007). This approach is based on the premise that a key role of followers is in influencing the leader and facilitating leader emergence: "Much of the literature on the study of leadership…neglects to acknowledge or even recognize the important role of followers in defining and shaping the latitude of leader's action" (Hollander, 1993, p. 29). Using this premise, Dvir and Shamir (2003) investigate how follower developmental characteristics are associated with followers' ability and inclination to actively contribute to the emergence of transformational leadership. Their findings show that followers' initial developmental level (e.g., self-actualization needs, collectivist orientation, critical-independent approach, active engagement in the task, self-efficacy) positively predicts transformational leadership among indirect followers, but these relationships were negative among direct followers.

Howell and Shamir (2005) provide a conceptual framework that depicts followers as having a more active role than that assumed in traditional leadership research. Similar to Chaleff's (1995) argument that powerful leaders need to be counteracted by powerful followers, Howell and Shamir (2005) indicate that it is naive for leadership scholars to believe that charismatic leaders can engage in self-reflection, self-monitoring and feedback seeking in ways that can manage the deleterious impact of charisma. Instead, followers need to recognize and play a more active role in avoiding the pitfalls and abuses of power that can come with charismatic leadership. "In our view, understanding followers is as important as understanding leaders" (Howell & Shamir, 2005, p. 110).

3.2.5. Followership behaviors

Role-based views also consider the kind of behaviors individuals use as they enact their follower roles (Carsten & Uhl-Bien, 2012, 2013). The most classic view of followership behavior is that associated with the obedient and deferent subordinate (Kelley, 1988; Zaleznik, 1965). However, the dynamic nature of the workplace, as well as a shift from production economies to knowledge economies, has called attention to both resistance and proactive behaviors among followers (Grant & Ashford, 2008; Tepper et al., 2001, 2006).

3.2.5.1. Obedience and subordination. Traditional stereotypes of followers as passive, deferent and subordinate come from long established assumptions in the management literature that leadership is grounded in hierarchy and authority (Barnard, 1938; Taylor, 1947). This hierarchical view, rooted in the belief that hierarchy legitimizes some individuals as "authority figures" more capable and effective than others (Weber, 1968), leads to the parallel assumption that the follower role is to carry out orders without question (Heckscher, 1994). Followers demonstrate obedient and subordinate behaviors in response to common beliefs that leaders are responsible for making decisions, solving problems, gathering information, and setting goals (De Cremer & Van Dijk, 2005; De Vries & Van Gelder, 2005; Ravlin & Thomas, 2005). This view can be seen in Carsten et al.'s (2010) findings of followers describing their job as "carrying out orders" and "doing things the leader's way."

The belief that those in follower positions are largely ineffectual is a powerful one (Courpasson & Dany, 2003). Lab studies have shown that the mere assignment of an individual to a subordinate role causes them to report less positive affect (Hoption et al., 2012), see themselves as ineffectual, and view leaders as having greater capability and agency (Gerber, 1988).Milgram's (1965, 1974) classic research on obedience shows a frightening picture of the lengths people will go to in obeying authority. As described by Milgram (1965), he was shocked at the extent to which people would "heedlessly accept" the commands of authority.

Replications of Milgram (e.g., Burger, 2009) and subsequent evidence from other studies (see Blass, 2009 for a review) suggest that the pull to follow orders from an authority figure is a powerful one, and represents a deep psychological phenomenon that is still in effect today. Burger (2009) interprets the high rate of obedience in his study as evidence of the powerful situational forces of hierarchical contexts of individuals in follower roles (see also Passini & Morselli, 2009). In followership research, Hinrichs (2007) and Carsten and Uhl-Bien (2013) link this propensity to follow to crimes of obedience, showing that individuals who hold more traditional views of followers as passive and obedient are more likely to be complicit in unethical actions of leaders by being more willing to go along with unethical requests.

Van Vugt and colleagues (King, Johnson, & Van Vugt, 2009; Van Vugt, 2006; Van Vugt, Hogan, & Kaiser, 2008) theorize that this propensity to follow may be rooted in natural selection. Using an evolutionary psychology perspective, they argue that certain traits and behaviors (e.g., leadership and followership) are selected and retained because they helped solve adaptive problems of our ancestors. Natural selection, then, predisposes individuals with genotypes for leadership and followership. This explains why some people act as followers and voluntarily subordinate themselves to others—our ancestors learned that in certain situations it is better to defer to a central command. Because evolutionary analysis suggests that the formal bureaucratic leadership structures are comparatively recent in human history, these structures may actually conflict with our evolved leadership psychology. This may shed light on why many individuals in modern organizations struggle with issues of dominance hierarchies and the powerlessness they create (Ashforth, 1989).

3.2.5.2. Resistance. The dominant view of followers as passive and obedient has resulted in much less attention being paid to other types of followership behavior, particularly resistance. Leadership research is highly normative (Padilla et al., 2007) and leader-centric (Hollander & Julian, 1969), resulting in little attention being given to the actuality that not all "followers" follow.

Early theory recognized this reality with Barnard's (1938) "acceptance theory of authority" and Hollander's (1958) idiosyncrasy credits. But formal study of follower resistance in leadership research did not occur until more recently, with Tepper and colleagues' focus on resistance behaviors (Tepper et al., 2001, 2006).

In a natural extension of abusive supervision research, Tepper et al. (2001) asked the question of how subordinates will respond to abuse from their supervisors. Arguing that they will be unlikely to reciprocate, Tepper et al. (2001) focused their investigation on two types of resistance behaviors: constructive and dysfunctional. Constructive resistance involves well-intended efforts to open a dialog with the supervisor (e.g., ask for clarification or negotiate). Dysfunctional resistance involves passive–aggressive responses in which subordinates might act as if they are too busy to complete the request, pretend they did not hear it, or say they forgot. Tepper et al. (2001) predicted and found that both types of resistance approaches are used more often in the presence of abusive supervision, and that how this occurs is partially dependent on subordinate conscientiousness and agreeableness.

In a follow-up study, Tepper et al. (2006) took the next step of examining managers' reactions to subordinate resistance. They began by suggesting that managers view subordinate resistance as either uniformly dysfunctional (all manifestations of resistance are bad) or multifunctional (some manifestations of resistance are more functional than others). Predicting LMX as a moderator, findings showed that the uniformly dysfunctional perspective characterizes low quality LMX relationships and the multifunctional perspective is found in high quality relationships. Managers rated low LMX subordinates unfavorably *regardless* of the resistance strategy they used, but high LMX subordinates were rated favorably when they used a constructive resistance strategy (i.e., negotiating). What was most interesting about this finding was that both low and high LMX subordinates were likely to use negotiation, but managers were only receptive to it from high LMX subordinates.

In an empirical investigation of resistance behaviors related to followership beliefs, Carsten and Uhl-Bien (2013) sought to determine whether a follower's belief in co-production would be associated with their willingness to engage in constructive resistance in the face of an unethical request by a leader. Findings show that followers with weaker co-production beliefs (based on Carsten et al., 2010; Shamir, 2007) demonstrate greater intent to obey a leader's unethical request, while followers with stronger co-production beliefs are willing to constructively resist the leader. This effect is moderated by romance of leadership, such that followers with stronger co-production beliefs who romanticize leaders report a stronger intent to obey the leader's unethical request.

3.2.5.3. Proactive behaviors. Proactive behaviors assess the creative and deliberate ways that employees plan and act on their environment to influence, change and alter it in ways they see fit. Proactive behaviors include influence tactics (Kipnis, Schmidt, & Wilkinson, 1980), feedback-seeking (Ashford & Cummings, 1985), taking charge behavior (Morrison & Phelps, 1999), prosocial rule-breaking (Morrison, 2006), voice (Morrison & Milliken, 2000; Van Dyne & LePine, 1998) influencing work structures (Parker, Wall, & Jackson, 1997), and personal initiative taking. Integrating these various perspectives, Grant and Ashford (2008) define proactive behavior as "anticipatory action that employees take to impact themselves and/or their environments" (p. 8). They characterize it as a process "that can be applied to any set of actions through anticipating, planning, and striving to have an impact" (p. 9). It can involve either in-role or extra-role activities.

While the parallels with trends in followership research are striking, there are some key differences between views in the proactivity literature and those in the followership domain. The concept of proactivity in the organizational literature is vast (Grant & Ashford, 2008), addressing a wide array of issues ranging from social processes to work structures to development and change processes. Proactivity addresses general work behavior and employees very broadly. Because followership behaviors necessarily occur in the context of hierarchical relationships with leaders, the issue of most relevance for followership research is how employees engage in this behavior in relation to leaders and how leaders receive and respond to followers' proactive behaviors (Whiting, Maynes, Podsakoff, & Podsakoff, 2012). This is not trivial, given research findings showing that leaders are not always receptive to proactivity from followers (Grant, Parker, & Collins, 2009; Whiting et al., 2012). Leaders may see proactivity as insubordination, a threat (Frese & Fay, 2001), an ingratiation attempt (Bolino, 1999) or overstepping bounds.

In early work examining these issues in the context of followership research, Carsten and Uhl-Bien (2012) investigated how individual differences in followership co-production beliefs would be associated with the way in which followers construct and enact their roles in relation to leaders. Findings show that followers higher in co-production beliefs reported greater voice and constructive resistance. This relationship was moderated by contextual variables (considerate leader style, overall relationship quality, and autonomous work climate) for voice, but not for constructive resistance. The interaction effect, contrary to predictions, showed that individuals with stronger co-production beliefs demonstrated fairly stable voice behavior, while individuals weaker in co-production beliefs varied in their voice behavior, reporting greater voice when leaders have a considerate style, relationship quality is high, and the work climate is more autonomous. The lack of a moderating effect for constructive resistance suggests that resistance, even when constructive, may be risky. Even perceptions of a supportive climate may not be enough to encourage followers to constructively resist. With respect to voice, however, followers with stronger co-production beliefs appear to be undeterred by context. They appear more likely to speak up even when their relationship with the manager is weak or they perceive that the leader will be unreceptive. This willingness to speak up may be beneficial in cases where a leader is making bad decisions, but the question remains as to whether leaders will be open to and/or receptive of the input.

3.2.5.4. Influence tactics. Research on influence tactics shows that followers are intentional and strategic in their use of strategies to shape and define the behaviors of leaders. Typically, upward influence tactics are designed to motivate supervisors to produce the outcomes desired by the subordinate (Higgins, Judge, & Ferris, 2003). Ansari and Kapoor (1987) found that influence tactics used by subordinates are significantly affected by the manager's leadership style and that they vary as a function of the goals the follower

seeks to achieve by influencing the leader. When followers seek personal benefits (e.g., career advancement), ingratiation is the most often employed tactic, whereas when followers seek organizational goals, they invoke a combination of rational and non-rational tactics, such as blocking, upward appeal, and rational persuasion. With respect to leader style, followers have a greater tendency to use non-rational tactics—such as blocking, upward appeal, and ingratiation—when responding to an authoritarian manager, and rational strategies (i.e., rational persuasion) when responding to nurturant-task/participative managers (see also Cable & Judge, 2003). Research by Grant and Hofmann (2011) shows that followers may also seek to increase their influence through proactive measures, such as role expansion, which they perceive will be beneficial to performance ratings from supervisors.

Yukl and Falbe (1990) explored the relationship between influence tactics and influence objectives in downward, upward, and lateral influence attempts. They found that the hierarchical direction of the influence attempt (e.g., upward, downward) had more impact on influence objectives (e.g., personal objectives, organizational objectives) than on the choice of influence tactics (e.g., coalition, ingratiation). Falbe and Yukl (1992) found that follower inspirational appeals and consultation were most effective, and pressure, legitimating and coalition tactics were least effective (with rational persuasion, ingratiation, personal appeals, and exchange tactics intermediate in terms of their effectiveness). Falbe and Yukl (1992) also found that combining two soft tactics or a soft tactic with rationality tends to lead to the greatest likelihood of success. This finding is bolstered by a more recent meta-analysis showing that ingratiation (a soft tactic) and rationality consistently have the strongest positive relationships with work outcomes (Higgins et al., 2003).

What seems clear from this cursory review is that followers consider the target of their influence tactics, the purpose of their influence attempts, and actions that can be taken to shape and define leader behaviors in order to achieve the personal and organizational goals of the follower. As research on follower influence tactics has increased, the results continue to suggest a higher level of goal, target, and context complexity than previously expected (Farmer, Maslyn, Fedor, & Goodman, 1997).

3.2.6. Summary of role-based views

Role-based views of followership are recognizable to leadership scholars, as they are in line with traditional approaches to studying leadership in the context of manager and subordinate roles. The difference is that they "reverse the lens" from leaders as causal agents to followers as causal agents (Shamir, 2007). In many ways they provide interesting twists on old questions. For example, instead of investigating leader style as antecedent to organizational outcomes, role-based views call for us to investigate follower traits and behavioral styles as antecedents to leader attitudes and behavioral outcomes.

For followership research to advance, therefore, new constructs and variables will have to be developed. Some of these may be variations on existing measures (e.g., proactive behaviors to "proactive followership behaviors"; perceived leader support to "perceived follower support"). Some may already be developed (e.g., implicit followership theories, which is theoretically derived from implicit leadership theories). Others will require new approaches, such as follower role orientations and followership outcomes. As described by Shamir (2007):

> "…while ultimately our approach to the study of leadership should be neither leader-centered nor follower-centered, at this stage, the study of leadership would benefit from a more follower-centered perspective. It is important to examine not only how followers contribute to the construction of a leadership relationship but also how they empower the leader and influence his or her behavior and what is their contribution to determining the consequences of the leadership relationship" (p. xxi).

3.3. Constructionist views

Constructionist views describe how people come together in a social process to co-create leadership and followership (DeRue & Ashford, 2010; Fairhurst & Grant, 2010). What signifies constructionist views is that they are necessarily processual views. They see people as engaging in relational interactions, and in these interactions co-producing leadership and followership (e.g., relationships, behaviors and identities) (DeRue & Ashford, 2010; Shamir, 2007). These relational interactions do not necessarily align with formal hierarchical roles. Constructionist followership research investigates how people interact and engage together in social and relational contexts to construct (or not construct) leadership and followership (Fairhurst & Uhl-Bien, 2012).

3.3.1. DeRue and Ashford's leadership identity construction process

Drawing from research on "identity work" (Pratt, Rockmann, & Kaufmann, 2006; Snow & Anderson, 1987) and social interactionism (Blumer, 1969; Goffman, 1959), DeRue and Ashford (2010) offer a constructionist view that identifies leadership and followership as co-constructed in an interactive and reciprocal identity "claiming" and "granting" process. Claiming occurs when an individual or individuals ascertain identity as either a leader or a follower. Granting occurs when others bestow the claimed identity and claim their own identity in support of the other (i.e., "I grant you a leader identity and claim for myself a follower identity"). The process works (i.e., leadership and followership are constructed) when claims are met with grants, and vice versa. Leadership and followership can also be *not* constructed in cases where grants and claims are not reciprocally supported. In other words, even though one might have a title of a "manager," he or she may not actually be a "leader" if subordinates do not grant them a leader identity and claim for themselves a follower identity. With respect to followership, DeRue and Ashford (2010) recognize that grants involve some individuals taking on follower roles. Without this claiming of a follower identity, leadership is not constructed.

DeRue and Ashford's (2010) model has other critical implications for the study of followership. For example, in contrast to portrayals of leader and follower identities as intrapersonal, one-way and static, the social construction process sees identities as shaping and shifting over time as individuals engage in mutual influence processes. Identifying claiming and granting processes allows us to recognize that there can be different types of constructions of leadership and followership. These constructions can take the form of a stable hierarchical role relationship or a shifting leadership structure. The latter involves a "dynamic exchange of leadership and followership that is constantly being renegotiated across time and situations… [such that] the boundaries between leader and follower identities are permeable" (DeRue & Ashford, 2010, p. 635). Returning to the discussion of semantics raised earlier, this again implies that equating leaders with "managers" and followers with "subordinates" in leadership research and practice underplays the dynamic and socially constructed processes of leadership and followership.

3.3.2. Shamir's co-production

Shamir also offers a constructionist view that comes from a relational perspective, but he calls his approach "co-production." Building from LMX theory (Graen & Uhl-Bien, 1995) and Hollander's (1993) notion of an active role of the follower, Shamir (2007) proposes that leadership is jointly produced (Dvir & Shamir, 2003) by leaders and followers when they form effective leadership relationships that help them co-produce leadership outcomes. The role of the follower is to work with the leader to advance the goals, vision, and behaviors essential for both work unit and organizational success. According to Shamir (2007), co-production positions the role of followers as "broader and more consequential" than seen in traditional leader-centric theories (p. xi). A co-production view elevates followers from passive recipients of leaders' influence to active co-contributors in the leadership process (cf. Hollander & Julian, 1969). In this way, it offers a more "balanced" view to leadership by calling for leadership researchers to investigate the role of both leaders and followers in the leadership process.

3.3.3. Collinson's post-structuralist identity view

Collinson (2006) argues for the importance of understanding follower identities through the use of post-structuralist analysis. Post-structuralist approaches assume that people's lives are inextricably interwoven with society. Therefore individuals are best understood as social selves (Burkitt, 1991; Layder, 1994). As a result, people's actions must be viewed in the context of complex conditions and consequences (Giddens, 1984), such as power/knowledge regimes that influence individuals' subjectivities (Foucault, 1977, 1979).

An interesting contribution of post-structuralist analysis is that it allows us to see how individuals collude in their own subordination (Collinson, 2006). Collinson offers examples of how this can occur by describing three types of follower identities that can be enacted in the workplace. The first, *conformist selves*, acts in accordance with prescribed ideal-type behaviors. "Conforming individuals tend to be preoccupied with themselves as valued objects in the eyes of those in authority" (Collinson, 2006, p. 183). The second, *resistant selves*, focuses on our "oppositional selves" that engage various dissent strategies. These strategies are enacted to deal with dissonance we experience in response to organizational and managerial control systems (with recognition that resistance will be subject to discipline and sanctions). The third, *dramaturgical selves*, recognizes that people are "under the gaze of authority…aware of themselves as visible objects" (Collinson, 2006, p. 185). When this self is enacted individuals experience heightened self-consciousness that leads them to become skilled manipulators of self and information (e.g., impression management; see also Goffman, 1959). By recognizing these selves, Collinson (2006) argues that we can better understand the complex ways followers invoke and enact identities in interaction with leaders.

3.3.4. Fairhurst and Uhl-Bien's relational (discursive) approach

Fairhurst and Uhl-Bien (2012) offer a discursive approach to leadership that positions followers as "actors" who "engage, interact and negotiate" with leaders to influence organizational understandings and produce outcomes. Leadership is viewed as a "relational process co-created by leaders and followers in context" (p. 1024). Discursive approaches study this process by examining the micro-dynamics of communication in interpersonal interactions. They look for co-construction by examining, for example, sequential patterns of control among leadership actors (i.e., acts of leading and following), influential acts of organizing (e.g., influence attempts and responses) and the "language games" played by those acting in leader and follower roles (e.g., how individuals position themselves to one another and how patterned redundancies get institutionalized into roles, identities and systems, cf. DeRue & Ashford, 2010).

While Fairhurst and Uhl-Bien (2012) do not privilege followership in their discussion, the critical role of following is implicit in this process. Followership and leadership can be seen in how individuals act and respond in relational control moves, in mobilizing moves, in language games (e.g., in acts of claiming and granting, DeRue & Ashford, 2010). It can be studied by analyzing how those who occupy subordinate roles engage with those occupying manager roles to see if they are constructing or not constructing leadership (e.g., through "one-up" assertions of control, "one-down" acquiescence, or "one-across" neutral moves) (Fairhurst, Green, & Courtright, 1995; Fairhurst, Rogers, & Sarr, 1987; see also Larsson & Lundholm, 2013).

3.3.5. Summary

Our review shows that the role of followers and following is essential to leadership, so much so that it is hard to disentangle followership from leadership. This is particularly true in constructionist views, which see followership as a necessary element in the co-construction of leadership, although it also applies to role-based approaches. One of the biggest challenges for the emerging study of followership is semantics that emanate from reductionist logics that cause us to immediately hone in on the

"follower" as an individual or role, overlooking the fact that "following" behavior is crucial in the construction of (or failure to construct) leadership.

Following is a particular form of behavior that involves recognizing and granting legitimacy to another's influence attempt or status (DeRue & Ashford, 2010). If there are no following behaviors, there is no leadership. *In fact, it is probably easier to recognize leadership in following behaviors than it is in leadership behaviors*, since individuals attempting to be leaders are only legitimized in the responses and reception of those willing to follow them.

This creates obvious challenges for leadership scholars. It means that if we are going to study the leadership process we need to stop relying on our broad labels of leader and follower and better understand the nature of leading and following. Bedeian and Hunt (2006) call this the "truth-in-advertising" claim in leadership: We study managers ("leaders"), but do we really study leadership? This concern is also raised in Fairhurst and Antonakis (2012), who describe the problem as coming from our observational units (individual perceptions) being out of line with our ontological units (leadership and followership behaviors and processes). If we are interested in studying leading and following then we need to adopt methodological approaches that allow us to see these behaviors in action (Fairhurst & Uhl-Bien, 2012). Some even argue that our leadership measures suffer from attributional bias that should make us question whether what we are tapping into is really a general halo effect, rather than the theoretical constructs we purport to be measuring (Martinko, Harvey, Sikora, & Douglas, 2011; cf. Phillips & Lord, 1981; Rush et al., 1977; Van Knippenberg & Sitkin, 2013).

4. A formal theory of followership

Despite the obvious need to better understand the role and impact of followers and following in the co-creation of leadership, we still know little about these issues. For followership research to advance, one of the biggest needs is to clearly define and identify theoretical constructs for the study of followership. Therefore, in this section we draw from our review to introduce a formal theory of followership. In our discussion we follow established guidelines for developing theory (Bacharach, 1989; Suddaby, 2010; Sutton & Staw, 1995). We begin by providing a clear conceptual definition of the construct. We then define the boundaries of the theory, identifying what followership is and what it is not. From this we establish theoretical constructs and outline directions for future research in the study of followership using two theoretical models based on our review above: role-based and constructionist approaches.

4.1. Clear conceptual definition

As stated in our earlier definition, *followership theory is the study of the nature and impact of followers and following in the leadership process*. This means that the construct of followership includes a follower role (i.e., a position in relation to leaders), following behaviors (i.e., behaviors in relation to leaders), and outcomes associated with the leadership process. If adopting a constructionist (process) approach, it involves consideration of the co-constructed nature of the leadership process.

4.2. Defining theoretical boundaries

Theoretical validity requires that we establish clear boundaries and a nomological network for the study of followership (Bacharach, 1989; Cronbach & Meehl, 1955). Followership *is* the characteristics, behaviors and processes of individuals acting in relation to leaders. It is *not* general employee behavior. This means that the term follower is not the same as employee. For a construct to qualify as followership it must be conceptualized and operationalized: (a) in relation to leaders or the leadership process, and/or (b) in contexts in which individuals identify themselves in follower positions (e.g., subordinates) or as having follower identities (Collinson, 2006; DeRue & Ashford, 2010).

Constructs in followership research must also be operationalized within this nomological network (Cronbach & Meehl, 1955). We list theoretical constructs and a sampling of variables that could be included in the study of followership in Fig. 1. Examples of followership constructs are:

- *Followership characteristics*: characteristics that impact how one defines and enacts followership. (Examples may include role orientations, motivations, intellectual and analytical abilities, affect, and social constructions of followers and/or individuals identified as engaging in following behaviors.)
- *Followership behaviors*: behaviors enacted from the standpoint of a follower role or in the act of following. (Examples include the multiple expressions of overt followership including obeying, deferring, voicing, resisting, advising, etc.)
- *Followership outcomes*: outcomes of followership characteristics and behaviors that may occur at the individual, relationship and work-unit levels. (Examples include leader reactions to followers, such as burnout or contempt; follower advancement or dismissal; whether leaders trust and seek advice from followers; and how followership contributes to the leadership process, e.g., leadership and organizational outcomes.)

In selecting variables for the study of followership, a key consideration must be whether it fits the followership domain. Followership theory is *not* the study of leadership from the follower perspective. It *is* the study of how followers view and enact following behaviors in relation to leaders. This context necessarily involves issues of power, control, motivational intentions (e.g., motivation to lead, resistance to change), personal characteristics (e.g., dominance, Machiavellianism, political skill), climate (empowering versus authoritarian), behavioral intentions, and desired outcomes of followers. *Therefore, we would not expect that*

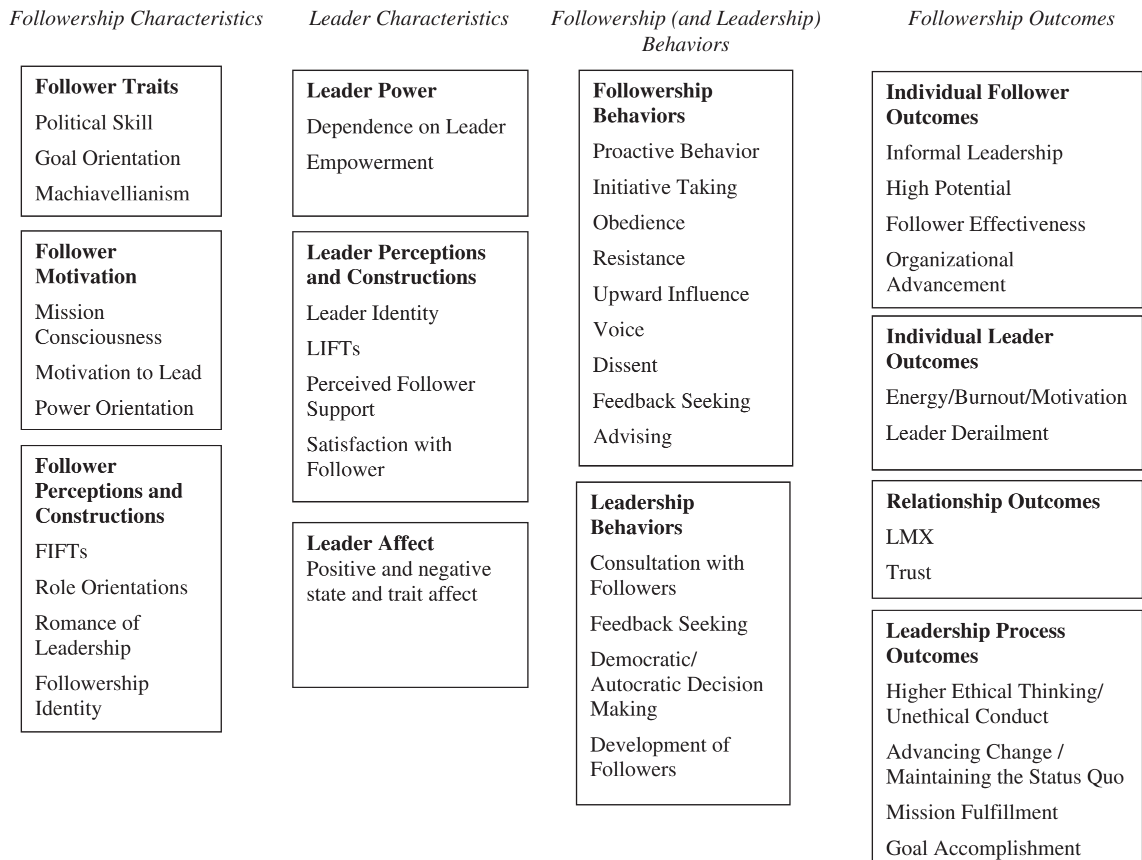

Fig. 1. Theoretical constructs and variables for the study of followership.

because a variable has been used in leadership research it necessarily means it should be used in followership research. Nor would *any* traits or characteristics of individuals necessarily apply to followership. Variables selected must consider the unique context and research questions associated with followership. In other words, followership research should not simply mirror or replicate leadership research. Instead we must consider the unique contexts in which following takes place and theorize and operationalize appropriately.

4.3. Conceptual framework and directions for future research

For a framework to count as a theory it must specify proposed relationships among the theoretical constructs (Sutton & Staw, 1995). Consistent with this, we identify two potential theoretical frameworks for the study of followership. The first is depicted in Fig. 2 and represents the role-based approach. We refer to this model as "reversing the lens," since it illustrates how followers' characteristics and behaviors may affect proximal outcomes of follower and leader behaviors, and more distal outcomes like leadership processes and organizational effectiveness. This framework highlights how followers affect followership outcomes at the individual, dyad, and work unit level of analysis.

The second framework is depicted in Fig. 3 and represents the constructionist approach. We refer to it as "the leadership process," since it illustrates a connectionist system involving leaders (or leading) and followers (or following) interacting together in context to co-construct leadership and followership as well as their outcomes. In this sense, it highlights leadership as a dynamic process that occurs in the interactions of individuals engaged in leading and following.

These models are not the only possible frameworks for the study of followership, but we chose them to be consistent with the emerging followership approaches identified in our review. For each framework we describe the model and outline a broad agenda for future research.

4.3.1. "Reversing the lens"

The "reversing the lens" approach (see Fig. 2) centers on investigating ways that followers construe and enact their follower role, and the outcomes associated with follower role behavior. Rather than studying leaders as the entities that "cause" outcomes, this framework focuses on studying followers' characteristics and behaviors as antecedents (i.e., causal agents) of followership outcomes (Shamir, 2007) at the individual, relationship and work unit levels of analysis.

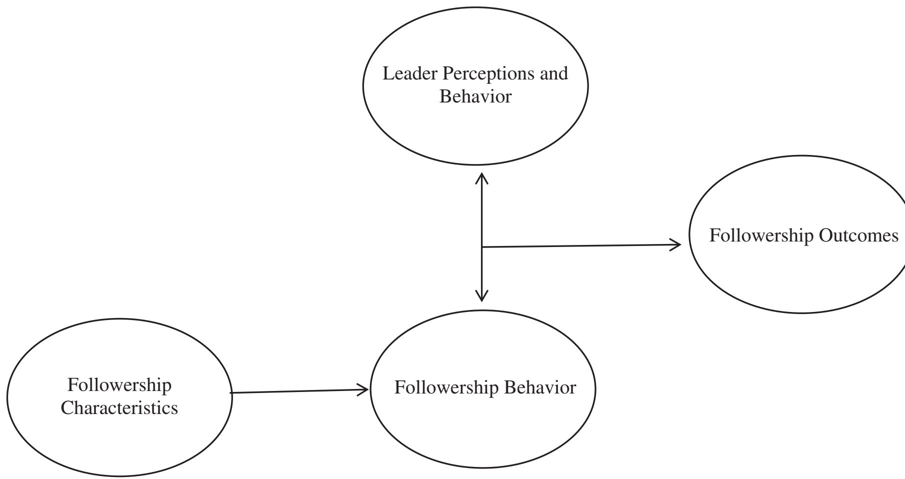

Fig. 2. Reversing the lens.

A followership role is often ambiguous and open to interpretation (cf. Parker, 2007). As such, our framework focuses on understanding the factors that influence how one constructs their follower role (e.g., goal orientation or power orientation), the various followership role constructions or orientations that exist (e.g., passive, proactive, resistant or "non-following"), and how leadership and organizational contexts influence one's constructions (e.g., leader style, authoritarian climate) (cf. Carsten et al., 2010). Given that role perceptions and orientations directly impact role behaviors (Katz & Kahn, 1978; Selznick, 1957), these followership characteristics are important drivers of how followership is enacted at the individual and group levels.

In addition to understanding how individuals (or groups) construct the follower role, our framework denotes the different ways in which the follower role can be enacted, consistent with the discussion of follower typologies above. From a role perspective, they are behaviors that followers (i.e., subordinates) demonstrate while interacting with leaders (i.e., managers) in organizations. Such behaviors may serve to advance the leader or the leadership process (i.e., voice or initiative taking), derail the leader or detract from the leadership process (e.g., dysfunctional resistance), or overthrow the leader altogether (Detert & Burris, 2007; Tepper et al., 2006). Alternatively, followers may engage in behaviors that neither help nor hurt the leader (e.g., disengagement) or passively accept whatever directive the leader hands down (i.e., obedience) (Uhl-Bien & Carsten, 2007). These various followership behaviors will produce different outcomes depending on the leader, the context, and the goals to be accomplished (Carsten et al., 2010).

Followership outcomes result from followership characteristics and behaviors in the leadership process. Such outcomes can occur at the individual leader level (e.g., leader burnout), the individual follower level (e.g., being identified as an informal leader or high potential), the relationship level (e.g., LMX), or the work-unit level with regard to leadership processes (e.g., mission fulfillment, accomplishment of goals). For example, followers can affect leaders at the individual level with regard to their motivation and energy

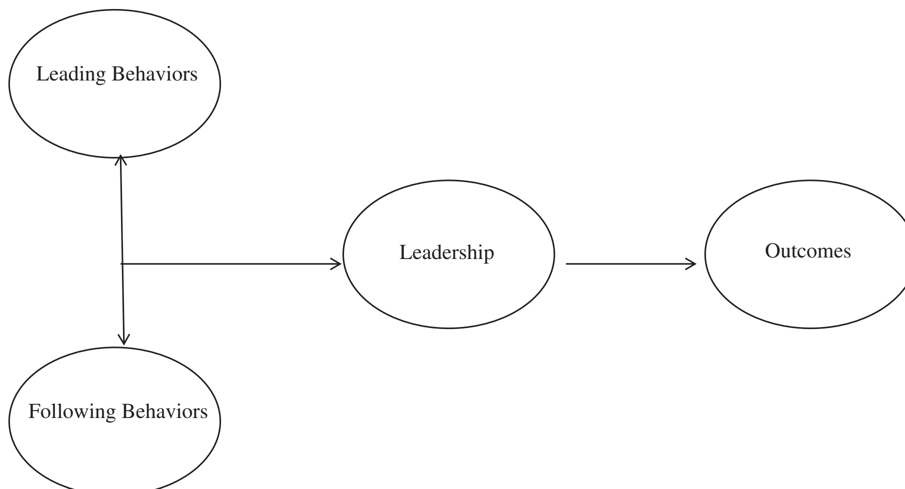

Fig. 3. The leadership process.

(cf. Gooty, Connelly, Griffith, & Gupta, 2010); they can also influence the way the leader uses power and influence tactics, or the leader's ability to understand problems and priorities (cf. Yukl & Falbe, 1990). A follower's behavior is likely to be influenced by how they are treated by the leader (e.g., follower development, follower repression), whether the leader perceives them as effective, or whether they advance within the organization. At the relationship level, followership behaviors can affect LMX and the level of trust leaders have in followers. At the work unit or organizational level, followership behaviors can impact unit-level decision making, problem solving, ethical conduct, and the ability of a department or organization to adapt and change.

What is interesting about these outcomes is that they begin to explore “the leader side” of the leadership story (i.e., how leaders are affected by followers). Rather than simply agents of leadership, role-based followership approaches focus on investigating leader wants, needs, attitudes, motivations, emotions, and effectiveness as *outcomes* of followership characteristics, behaviors and styles. Exploring the leader side of the story makes sense, particularly in today's environment, as we know the demands on leaders are more challenging with the changing face of followership and power in the workplace (Bennis, 2000). Moreover, in most situations leaders (i.e., managers) inherit their followers (i.e., subordinates) when they enter a work unit, and those followers already have patterns of relationships and behaviors. Although leaders can try to break or influence these patterns of behavior, they cannot fully control them (Biggart & Hamilton, 1984; Streatfield, 2001). Reversing the lens causes us to think about leaders as recipients of follower behaviors and support (or lack of support), and examine issues of reverse causality raised in the literature by Lowin and Craig (1968) and Herrold (1977) but never fully explored.

4.3.2. “The leadership process”

The “leadership process” approach (see Fig. 3) is interested in understanding how leaders and followers interact together in context to co-create leadership and its outcomes. It does not assume that leading and following are equated with one's hierarchical position in an organization. Rather, it acknowledges that managers can also follow (and might not lead), and subordinates can also lead (and might not follow). In the “leadership process” framework, the primary question of interest for followership is what characterizes following behaviors, and how do following behaviors work together with another's leading behaviors to construct leadership and its outcomes?

The basic assumption of a leadership process approach is that leadership can only occur through combined acts of leading and following. If someone makes a leadership (influence) attempt(s) but it is not responded to with following (deference) behavior(s) then it is not leadership (cf. Shamir, 2007, 2012; Uhl-Bien & Pillai, 2007). The constructionist approach to followership, therefore, studies how individuals or collectives engage in following behaviors in ways that construct leadership.

Following behaviors can be those that “grant” power and influence to another. These behaviors are associated with an individual “claiming” a follower identity or granting a leader identity (DeRue & Ashford, 2010). Such behaviors may take the form of succumbing to the wishes or desires of another by deferring, obeying, or complying. Following behaviors could also involve “co-producing” leadership outcomes by still deferring to another and granting their leader claim, but also advising, challenging, correcting or persuading in a respectful and trusting way to generate more effective outcomes.

By thinking about followership as behaviors and relational interactions we open up possibilities for seeing leadership and followership in more meaningful ways (Uhl-Bien & Ospina, 2012). A focus on following behaviors allows us to consider how patterns of leading and following behaviors work together to construct leadership (Fairhurst et al., 1987; Fairhurst et al., 1995; Larsson & Lundholm, 2013). Questions raised by this perspective are: What do patterns of leading and following look like in effective leadership and followership? What kinds of following behaviors are effective (and ineffective) for those in formal leadership positions? Can managers follow too much or too little? How far can subordinates go with co-producing following behaviors, and when will managers accept and reject their influence attempts? Are some co-producing following behaviors more effective than others?

A leadership process approach also allows us to investigate situations of “non-following.” Non-following occurs when one's leading attempts are not responded to with following behaviors. For example, non-following can occur in formal hierarchical roles when a manager's leading behaviors are responded to with subordinates' resistance behaviors. Resistance behaviors could be passive, such as ignoring or withdrawing (Tepper et al., 2001), which essentially negates a leading behavior attempt(s). Or resistance behaviors could be active, for example, when one person's (e.g., a manager's) leading attempt is met with another's (e.g., a subordinate's or group's) leading attempt, essentially constructing a power struggle (Bennett, 1988).

Right now these non-following situations are probably indicated by studies showing ineffective leadership or low quality leader–member relationships. But because our predominant approaches in leadership research have been survey data that capture individual perspectives, we know little about the nature of actual following and non-following behaviors in the leadership process. To align with the ontology and epistemology of the leadership process model, research in this area would need to include a range of methodologies, and not just survey measures. Such methodologies could include qualitative approaches (Creswell, 2012), discursive approaches (Fairhurst & Uhl-Bien, 2012), process studies (Langley, 1999), experience based sampling (Sin, Nahrgang, & Morgeson, 2009), experimental studies (Avolio, Reichard, Hannah, Walumbwa, & Chan, 2009), etc.

5. Conclusion

Followership theory offers promise for reinvigorating leadership research in rich new ways. It:

- Moves us beyond leader-centric views to recognize the importance of follower roles, following behaviors, and the leadership process.

- Distributes responsibility for constructing leadership and its outcomes to all players (leaders and followers) in the leadership process.
- Focuses us on identifying more and less effective followership behaviors.
- Brings in context as embedded in the leadership process.
- Recognizes that leadership can flow in all directions, e.g., not only downward but also upward in a hierarchy when subordinates engage in leading behaviors.
- Allows us to understand why and how managers are not always effective leaders (i.e., when they are not able to co-construct leadership with their subordinates).
- Calls for followership development (and followership competencies), not just leadership development.

The full promise of followership theory can only be met, however, if we are disciplined to remain true to the followership construct. A temptation for leadership researchers will be to simply do what we did in leadership studies but change our causal paths and dependent variables. As we describe in our Defining theoretical boundaries section above, however, followership theory is not the mirror of leadership theory. It requires new ways of thinking, new types of theorizing, and operationalizing and testing different kinds of variables.

A very real concern we have for moving forward is that leadership researchers will flock to the role-based approach and not fully consider the leadership process approach. We tend to study what is easy (Lord & Brown, 2001). Moreover our field and journals get locked into certain methodological approaches (e.g., *Leadership Quarterly* tends toward quantitative, often at the expense of qualitative, cf. Bryman, 2004). But followership is theorized as a multi-paradigmatic framework. It calls for scholars to conduct research across a range of paradigmatic assumptions and methodological approaches: role-based approaches are more entity/postpositive and leadership process approaches are more constructionist/interpretivist (Ospina & Uhl-Bien, 2012). Moreover, it calls for theoretical models to be generated inductively (e.g., using qualitative research) as well as deductively (e.g., using quantitative research). And for true scholarly advances, followership researchers should draw insights from across all paradigmatic perspectives and findings on followership.

In moving forward with followership theory we echo Shamir's (2007) call for research that not only “reverses the lens” but also takes a “balanced” approach that views both leaders and followers as co-producers of leadership and its outcomes (see also Uhl-Bien & Ospina, 2012). In addition, we heed Van Knippenberg and Sitkin's (2013) admonishment of transformational and charismatic leadership as a strong warning call for research on followership theory: *As we advance followership theory*, *we must be careful not to replicate our mistakes of the past* (see Van Knippenberg & Sitkin, 2013). We suggest we can do this by paying careful attention to strong theory-building (Bacharach, 1989), adopting a range of methodological approaches (Fairhurst & Uhl-Bien, 2012), sufficiently specifying causal models with theoretically and empirically distinct paths of followership (Van Knippenberg & Sitkin, 2013), not confounding followership with its effects (Van Knippenberg & Sitkin, 2013), and engaging in paradigm interplay among followership researchers using multiple paradigmatic perspectives (Uhl-Bien & Ospina, 2012).

In this article we set the stage for this process by offering a clear conceptual definition of followership and two general frameworks for research on followership theory based on a systematic review of the literature. We seek to spark more in-depth theorizing among followership researchers that takes into careful consideration the unique followership construct and context. By advancing a broad framework of followership that brings together scholars across multiple paradigmatic perspectives, we believe followership research can provide deep new insight into the nature of leadership and followership in organizations. In this way, we will contribute not only to our understanding of followership, but also add new understanding to what it means to be leaders and followers in the face of ever-increasing workforce demands.

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