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iLeadership: the leadership style of Steve Jobs

Christopher J. Valentine

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iLEADERSHIP: THE LEADERSHIP STYLE OF STEVE JOBS

A dissertation submitted in partial satisfaction

of the requirements for the degree of

Doctor of Education in Organizational Leadership

by

Christopher J. Valentine

August, 2014

June Schmieder-Ramirez, Ed.D.- Dissertation Chairperson

This dissertation, written by

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under the guidance of a Faculty Committee and approved by its members, has been submitted to and accepted by the Graduate Faculty in partial fulfillment of the requirements for the degree of

DOCTOR OF EDUCATION

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DEDICATION

This dissertation is dedicated to my mother and father.

To my mother, Joanne, your support and faith in me mean the world to me. I am eternally grateful for the qualities of tenacity, hard work, dedication and perseverance that you have bestowed upon me. Thank you for helping me become the person I am today.

To my father, Christopher, whom I wish were alive today to see me complete this major goal my life. Your strength to the very end will always be an inspiration to me and serve as a reminder to me to never take life's opportunities for granted. Thank you for impressing upon me the importance of having a sense of humor and the mental strength to endure when times are tough. You are forever missed.

Love you both.

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First I would like to thank my dissertation chair, Dr. June Schmieder-Ramirez for her advice and support. I would also like to thank the rest of my dissertation committee; Dr. Kent Rhodes and Dr. Joseph Cutcliffe for their insights, guidance and dedication in helping me succeed in this effort.

I would also like to thank my family for their continued encouragement in this process. This has been a long road and they were with me every step of the way. Thank you for all the love, support and encouragement along the way on this long journey.

Last, but not least, I owe the completion of this program and degree to the unyielding, unwavering love from my best friend and love of my life, my amazing wife Karen. It is Karen that should receive credit for helping me more than words can describe. From the gentle nudges to the bold reminders, Karen challenged my thinking and helped me move forward. When life got in the way of this dissertation she helped me stay the course and I will be eternally grateful for all her inspiration, enduring patience, empathy, and faith in me as this has been a process I could not have imagined finishing without her support.

As we continue to learn and grow from one another, I am a better person because of her and her love for me.

I look forward to each and every day with you in my life as we continue our journey. You are my everything. I love you.

VITA

Christopher J. Valentine

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European Union Business Strategy: University of Antwerp, Belgium
Global Enterprise Management in Asia: Hong Kong University Science and Technology,
Six Sigma Greenbelt: Honeywell International
Dale Carnegie Leadership and Management Courses
Human Resources Management: The Employer's Group

EMPLOYMENT

United Health Group, OptumRx Division, Irvine, CA   2013- Present
Human Capital Partner
Provide leadership and guidance in the areas of human capital change management and
workforce planning.

3M, Irvine, CA   2010- 2013
Field Human Resources Manager
3M, Transportation Systems and Security Division Acquired Federal Signal Technologies

Federal Signal Technologies, Irvine, CA
Director Human Resources
A $100M Intelligent Transportations Systems Division of $800M Federal Signal Corp.
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software and hardware division of Federal Signal. Managed four direct reports.

Barksdale, Inc., Los Angeles, CA   2005- 2010
Director Human Resources
A $45M Industrial Controls Division of $2.8B Crane Co.
Led HR for employees in US, Germany, and China with five direct reports

Honeywell, Los Angeles, CA   2002-2005
Senior Human Resources Generalist
A $9B Aerospace Division of $46B Honeywell International
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Valentine & Associates, Newport Beach, CA   2000 – 2002

Human Resources Consultant
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PUBLICATIONS
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Fischer, C., Moodian, M., Nainoa, F., & Valentine, C. (2006). Successful teaching models for effective political leadership in today's diverse municipalities. *Proceedings of the Twenty-Ninth Annual Conference of the Society of Educators and Scholars.*

Fischer, C., Moodian, M., Nainoa, F., & Valentine, C. (2006). Leadership of a city: secrets of successful Southern California mayors. *Proceedings of the Fourth Annual Hawaii International Conference on Education.*

PRESENTATIONS
Fischer, C., Moodian, M., Nainoa, F., & Valentine, C. (2006). Successful teaching models for effective political leadership in today's diverse municipalities. *Proceedings of the Twenty-Ninth Annual Conference of the Society of Educators and Scholars.* Paper presented at the Twenty Ninth Annual Conference of the Society of Educators and Scholars, Long Beach, CA.

Fischer, C., Moodian, M., Nainoa, F., & Valentine, C. (2006). Leadership of a city: Secrets of successful Southern California mayors. *Proceedings of the Fourth Annual Hawaii International Conference on Education.* Paper presented at the Fourth Annual Hawaii International Conference on Education, Honolulu, HI.

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ABSTRACT

In a technology-driven society, the global hunger for innovative products has put increased pressure on organizations to think differently. The pressure from shareholders on management to drive innovation and deliver financial results has forced leaders to adapt and look for new solutions to meet this demand. The solutions for which organizations are searching may reside in a new form of leadership required to achieve this expectation of performance.

The purpose of this dissertation was to discover what leadership characteristics are required to achieve a high-performance technology organization. The primary goal was to review and decode archival scholarly and contemporary literature to understand the key elements of effective leadership in modern leadership theory. After establishing a general understanding of leadership, the next goal was to learn the main characteristics that comprise transformational leadership. The next focus was to review a variety of secondary sources to provide insight into the leadership of Steve Jobs: a leader with a proven track record for driving profitable technology innovation. This dissertation then looked to discover the main components of Jobs' leadership style. After an extensive leadership theory review to create a baseline of understanding of effective leader concepts, the study examined the leadership style of a dynamic and influential leader in history, Steve Jobs. This study then explored the significance of a new leadership model for other technology based organizations to develop their leaders to stimulate profitable growth and innovation.

Chapter I

In the book *Outliers*, Malcolm Gladwell (2008) referenced a biological term called an

action potential, defined as:

> A momentary change in electrical potential on the surface of a nerve or muscle cell that
>
> takes place when it is stimulated, especially by the transmission of a nerve impulse:
>
> Stimulating a nerve fiber causes an action potential to spread across the nerve cell,
>
> making it contract. Synergy of thousands of nerve impulses traveling a superhighway to
>
> make a connection is what organizations should strive to do. (p. 23)

Gladwell's description of an electrical impulse needed to create movement is analogous to the

type of leadership needed to flex the muscle of an organization, including the hearts and minds

of the people in it. The challenge for many chief executive officers (CEOs) of Fortune 500

companies is accessing that action potential and creating a corporate culture that balances an

investment in people and innovation, while satisfying the profitability requirements of the Wall

Street investor community. The challenge facing technology leaders today is aligning the

organization with the proper leadership to turn creative power into profitable, breakthrough

innovation, while creating a company culture as its strategic competitive advantage.

Steel baron and founder of Carnegie Steel, Andrew Carnegie (as cited in Berg, 2010),

once claimed, "The only irreplaceable capital an organization possesses is the knowledge and

ability of its people. The productivity of that capital depends on how effectively people share

their competence with those who can use it" (para. 2). Once that relationship is established and

information and ideas can flow, leaders can then produce *synergies* in the organization. By

finding these synergies, organizations can adapt and respond to the changes in the global

marketplace (Schweiger, 2002). In a modern world of global competition, where consumers and

investors are pressuring corporate management for innovative products, the need for synergy, connectivity, and collaboration across the intellectual capital of an organization boils down to leadership. The effective leadership required to achieve this sustained level of organizational performance involves the competitive edge in the field of technology.

In 1976, a small company in Silicon Valley ignited a spark in the world of computers from out of a garage to the forefront of technology and dazzled the world with a new form of thinking. It would soon become one of the world's leading consumable technology companies with a market cap in excess of $500 billion, employing over 35,000 employees globally (Yahoo Finance, n.d.). This company emerged from a collective brain trust in creativity and innovation of two men and has evolved into an organization synonymous with technology innovation and a culture of breakthrough thinking. One man has been at the forefront of the brand, the culture, and its following. This man saw numerous transformations personally and professionally in this evolving company. In spite of being a college dropout, Jobs transformed the technology landscape unlike many CEOs of Fortune 500 companies before him. He solidified his unique leadership style in the record books as having one of the most effective leadership styles in creating shareholder wealth through the development of technology products.

The primary aim of this investigation was to understand the fundamental characteristics of a leader, highlight those that are core to the transformational leadership model, and then explore which traits are relevant to the leadership of Jobs. The focus will then be to examine those characteristics of Jobs, and evaluate which elements could be replicated to form a leadership model adaptable to any organization focused on profitable growth and innovation.

Background

Many CEOs of various leading technology companies are searching for the perfect executive coaching recipe to cultivate an organizational culture of innovative breakthrough thinking, cutting edge technology, and rapid product development cycles, which are built on meeting and creating a global demand for technology of their products. Over the course of history, from the industrial revolution to modern day, the need for the proverbial *better mousetrap* has spawned a stronger focus on and an investment in innovation from corporations. Now public corporations are seeking a new form of leadership capable of meeting these mounting pressures. According to Ulrich (2009):

> Investors have become increasingly attuned to and actively concerned about intangibles as well as financial results. Major shareholders will increasingly look beyond the balance sheet and into the quality of leadership in organizations that give them confidence in the future. (p. 24)

Aside from the financial pressures of Wall Street for profitable growth, technologies CEOs also face a market demand for leadership in driving organizational innovation.

The international consulting firm, PricewaterhouseCoopers International Limited (PwCIL), conducted a survey of 1,201 business leaders in 69 countries for their 14th Annual Global CEO Survey for 2011. Their survey responses revealed the rising importance of innovation needed to create new products and services marks. Their study further indicated:

> Chief executives are looking to gain both efficiencies and differentiation at the same time: 80% of CEOs in our survey believe innovation will both yield efficiencies and lead to competitive advantage −another 78% expect it will generate new revenues. Technology is one way of capturing both. (Nally, 2011, p. 8)

This survey reflects the importance innovation plays in profitability through the eyes of the global business community. It also places additional pressure on the CEO as the person responsible for driving innovative technology as a means to financial performance.

The term *conspicuous consumption* explains this emerging need for stronger leadership in the global marketplace (Veblen, as cited in Heilbroner, 1999). Because of the growing leisure class in countries such as China and India, there is a race between global technology companies to be the first to tap into these markets. In these developing and newly industrialized countries, the low cost of labor is enhancing their economic growth and reducing poverty (Bhagwati, 2004). Countries such as China and India are building their economies at high rates because of this increased demand for the latest and greatest phone, computer, or piece of technology. This new level of global affordability for technology-based products is driving consumers to expect more. Whether it is a new technology, a lower price, new features, or a faster product development cycle time, leaders of global organizations based in the United States must think differently in order to compete globally.

Technology-based corporations in the United States face multiple challenges in the race to compete in global markets. Globalization has made the world *flat*; it is now a global village with new markets offering new challenges and opportunities (Ulrich, 2009). Technology and the Internet have also increased the speed of information flow and the global connectivity of consumers. In addition to the global economic expansion in developing countries, the encroachment of cheaper counterfeit products in the market has forced many companies in the United States out of business (Bhagwati, 2004). As an example, counterfeiters in China have targeted Coca-Cola and several foreign brands (Fishman, 2005) with non-standard products. The

lack of government controls on counterfeiting in countries like China has placed additional pressures to be more competitive in creating new ideas before they are replicated and duplicated.

Organizations need to move faster in order to adjust to these changes in the global marketplace. According to Fishman (2005), the only way to do this is for an organization to have all employees focus on entrepreneurship and innovation. A chief problem for the United States is that it does not have enough global entrepreneurs. Fishman noted that "the country can stand to export far more manufacturing and service jobs than it does already, provided that Americans have the skills and creativity to offer the world new products and services" (p. 275). The focus for technology-based organizations in this race for innovative products and services is to harness the creativity and energy of human capital to create breakthrough thinking.

Technology has increased in accessibility, visibility, and connectivity. The connected world is smaller, rapidly changing, and has more open information (Ulrich, 2009). The surge for a more affordable and educated workforce in developing and low-cost countries is forcing global organizations in the United States to rethink their competitive strategies. They are being required to access their human capital faster than ever before. Tapping into an organization's human capital of creativity and ingenuity, as well as discipline and rigor, requires leadership. Generating new products faster and being first to market confers a growing competitive edge. Innovation is both a vaccine against market slowdowns and an elixir that rejuvenates growth (Rigby, Gruver, & Allen, 2009). Organizations need to be agile in a world where products are designed in one part of the world and manufactured in another. Leaders should know how to utilize global resources and be the first to market. Knowing how to orchestrate people and ideas in a global organization, despite cultural challenges, has made leadership development and succession plans key elements of many corporate strategic plans.

Corporations must constantly ask themselves, "What is next?" Innovation can potentially generate new markets with new products and new revenue streams. Innovation matters because it fosters economic growth. New products focusing on breakthrough technologies can revolutionize industries and cultures. In one respect, if employees can think of the impossible, perhaps they can try to achieve it. Kegan and Lahey (2001) asserted, "It may be nearly impossible for us to bring about any important change in a system or organization without changing ourselves" (p. 63). Kegan and Lahey also pointed out that in order to create new ideas and change the perspective of what is possible, the leaders of an organization need to create an environment that stimulates and supports breakthrough thinking.

Employees in global organizations need to be able to adapt to change in order to have a new mental model (Senge, 1990) and let go of the ways of the past. The process of managing this change and creating a vision of growth despite eminent adversity in the marketplace is essential. The key to competitive advantage will be the capacity of leadership to create a social architecture capable of generating intellectual capital, innovation, knowledge, and expertise (Bennis & Townsend, 1995). Avolio and Bass (2002) pointed out that "An organization's ability to conceptualize and manage change to compete from the inside out by increasing its capacity for change has become a competitive advantage in itself" (p. 91). In order for organizations to compete on a global scale, to drive innovation, and to foster change a form of leadership will be the competitive advantage.

Statement of the Problem

In a global macroeconomic environment, there is increased pressure on executives of publicly traded corporations to meet and exceed both the investor pressure for shareholder value as well as consumer demand for the latest innovative products. In order to achieve these goals,

management of these technology organizations must think differently and examine a new form of leadership.

Purpose and Importance of the Study

According to Cashman (1999), "Purpose is present in how we show up in whatever activity we engage" (p. 65). Getting engaged means not only learning new ways to contribute, but also taking ownership. Ownership in the business means having pride and character in contributing to the success of an organization. Cashman asserted that "The purpose of character is to transform and to open up possibilities and potentialities. Qualities of character include authenticity, purpose, openness, trust, congruence, compassion, and creating value" (p. 43). Cashman's focus on character and purpose is critical for any organization because each person needs to recognize his or her purpose in finding abundance in the work he or she does every day. In order to achieve this higher level of self-actualization, leaders require the proper style to guide and align the human capital of an organization. Buckingham and Clifton (2001) said, "The best way to lead is by tapping into those very few needs we all share" (p. 72). To be at the forefront of innovation, organizations need the proper leadership to drive technology and harness the organization's intellectual capital as part of the business strategy for growth and profitability.

The purpose of this case study was to review and decode archival scholarly and contemporary literature and uncover the key elements of effective leadership that are core to fundamental business success and innovation in technology based organizations. Based on these core fundamentals, this study explored the elements of transformational leadership theory, and examined what leadership traits reflect the style of technology leader Steve Jobs. This inquiry into the leadership of Steve Jobs and how it evolved over time provided insight for other organizations. It provided a perspective for what type of technology leadership is needed to

create superior leadership practices for driving profitable growth. In addition, this study examined how these concepts can be applied and replicated for other organizations to evaluate their leadership for breakthrough thinking.

The demand for leadership in technology is now more pressing than ever, and the key to achieving an innovative competitive edge is through the leadership of human capital. This form of leadership can address the leadership gap for current CEOs of public technology focused global organizations to achieve profitable innovation. Deborah Wince-Smith (as cited in Fishman, 2005) argued that "the economy's capacity for innovation is the key to raising productivity, which itself is the most important component of competitiveness and economic growth" (p. 275). Jobs' lessons of leadership have generated new products that have made an impact on modern culture via technology. Jobs co-founded and shaped an organization of sustained above-average profitable growth with what would become one of the most valuable and recognized global brands. By reviewing modern leadership theory from the transformational leadership model and the style of Jobs, this study provided a perspective on effective leadership required for technology leaders to be able to drive profitability and innovation.

Research Questions

This study explored the following research questions:

1. Based on the historical review of literature, and from primary and secondary sources, what are the key traits that define the leadership style of Steve Jobs?

2. Over the course of his career, what leadership model(s) would resemble the predominant leadership attributes of Steve Jobs?

Scope of the Study

In reviewing the impact of Steve Jobs' leadership, the research spanned the life of his career and evaluated his impact on the businesses he led and the industries he revolutionized. The study also covered modern leadership theory research and literature defining the leadership characteristics and elements of a transformational leader. The study then addressed which of Jobs' leadership traits created breakthrough innovation. The dissertation concluded with a review of Jobs' legacy and future implications of his leadership style on the technology landscape and its application to other organizations.

Definition of Terms

This investigation used the following terms:

Innovation. Innovation can be defined as "the act or process of introducing new ideas, devices or methods" ("Innovation," n.d., para. 1). This definition is particularly important as it creates a baseline understanding of what it means to define a new product, process, or concept. Similar to art, technology standards can be open to interpretation as far as what is considered creative, but innovation can be defined by what is new to the user or the user experience in other aspects of the technology industry besides software or hardware. Innovation comes in many forms; this dissertation discussed how Steve Jobs embraced the challenge of constant innovation in his leadership style.

Shareholder value. Is the management philosophy that regards the measure of a company's success the extent to which it enriches shareholders' equity. For a publicly traded company, shareholder value (SV) is the value enjoyed by a shareholder by possessing shares of a company. It is the value delivered by the company to the shareholder in the form of increased earnings, an increase in market value of its shares or the increase in the amount or frequency of

the dividen paid ("Shareholder value," n.d., para. 1). Shareholder value is a metric designed to evaluate a company's financial value to the market.

As the most senior singular leader of a publicly traded company, the CEO is the individual that embodies the interests of shareholders as the steward of the business. The decisions the CEO makes boil down to the leadership of the people, the resources and the strategies that impact what the products or services the organization will provide or to what extent will be a profitable return for shareholders or investors.

Value drivers. As a shareholder, value is complicated to control directly. It is usually broken down into components called *value drivers*. Bender and Ward state, "There are seven key drivers of shareholder value: revenue, operating margin, cash tax rate, incremental capital expenditure, investment in working capital, cost of capital, and competitive advantage period" (2008, p. 17). These seven components that influence shareholder value are levers in an organization that link activities of a public organization to the value they create for the shareholder. Value drivers are the key elements that either build or protect the value of the business that the owner has worked so hard to create. ("Value drivers," n.d., para. 1). They determine the current and future value and dramatically affect how a business is perceived by potential buyers. The more a leader can influence one or several of these seven components can determine the success of the organization and can reflect the impact a leader has on long-term growth and shareholder value.

Intellectual capital. Bennis and Townsend (1995) stated that "the key to competitive advantage in the 1990s and beyond will be the capacity of leadership to create a social architecture capable of generating intellectual capital…Intellectual capital means ideas, know-how, innovation, knowledge, and expertise" (p. 3). In order for leaders to tap into an

organization's ability to drive innovation and shareholder value, they must first focus on the people, or the intellectual capital. Ultimately, the people with the ideas for new products, processes, and ideas create value or capital of an organization.

Mental models. Senge (1990) referred to mental models as "deeply ingrained assumptions, generalizations, or even pictures or images that influence how we understand the world and how we take action" (p. 8). There is an expectation that a leader will create a vision for employees that may establish the foundation for creating a mental model for the culture of an organization.

Systems thinking. Senge (1990) defined systems thinking as seeing the parts as distinct from the whole, reacting to the present and creating the future. It is the process of stepping back and looking at the problem, the market, and the organization, and examining the bigger picture. By looking at the larger picture, the role of the leader is to help define the system as a whole to the team.

Technology. The Merriam-Webster dictionary defines technology as, "the application of knowledge to the practical aims of human life or to changing and manipulating the human environment. Technology includes the use of materials, tools, techniques, and sources of power to make life easier or more pleasant and work more productive" (Technology, n.d., para 1). The history of technology has evolved from primitive tools to the creation of nano-sized silicon chips stored in machines that influence how individuals communicate and interact in the world. The intersection of technology and the human interaction in organizations will continue to be a challenge for leaders as more advances in technology create more distance in the human interaction.

Limitations and Assumptions of the Study

The study examined the form of leadership required to address the gap of management in technology-oriented companies that are preventing them from achieving breakthrough innovations while yielding maximum shareholder value. This study reviewed scholarly work from academia to modern leadership theory. These theories had various opinions and biases depending on the field or application of the leadership models. The author's bias to choose the transformational model also had limitations.

The data gathered on Steve Jobs was all archival data. These primary and secondary sources data gathered were both positive and critical–of the man and his opinions, views and leadership style. The goal of this study was to review and decode archival scholarly and contemporary literature on leadership to understand the key elements of effective leadership. Reviewing the leaderhip theory to understand what defines a successful leader was not market or industry specific; however, the study was focused on a technology based organizations because the subject was a leader in the field. Understanding the leadership of Jobs required an unfiltered approach to accept all bias in the many sources that wrote about him. Data collected from numerous published interviews, witnesses, and discussions generated similar themes of leadership and personality traits and skills. Additional information from documented statements from Jobs himself via interviews, speeches, and written statements also provided insight into the thought process and decision making skills of the subject.

The qualitative nature of this study was also to understand the fundamental concepts of leadership, transformational leadership, and the leadership of Steve Jobs. Numerous authors generated a wide variety of opinions on these topics. The researcher cannot understand human behavior without understanding the framework within which the subjects interpreting their

thoughts, feelings, and actions (McMillian & Schumaker, 2006). The variety in the sources and the amount of data collected was consolidated and coded in an attempt to reduce the bias of the qualitative review the leadership style of Steve Jobs.

The researcher chose to focus this leadership study on the technology industry due to the subject's focus. This study documents the impact Jobs had on revolutionizing multiple industries via improvements in technology. Although the focus of the study was on Jobs' leadership skills and traits, the investigation yielded additional assumptions on the leadership impact he had on modern culture and the impact his products made on the world. This study explored numerous opinions of colleagues, scholars, and others, which presented biased perspectives on Steve Jobs, his leadership impact on the organizations he led, the markets he influenced, and the impression he left on people.

Summary

This chapter has served as an introduction to the dissertation, presenting the need for further inquiry into the study of leadership and its relevancy for the technology sector. Overall, this study examined leadership theory and presented research using a variety of collection methods to understand the leadership of Steve Jobs. The dissertation explored the characteristics that define leadership as well as various leadership theories as a baseline of understanding. The author transitioned from general leadership theory to the transformational leadership model as an ideal for comparison.

After establishing an understanding of the essential components of the transformational leadership model, the study explored a chronology of Jobs' professional career in Chapter II. Through an extensive literature review and data from Chapter II, this study established a foundation from which to address the research questions. After answering the research

questions, the author examined future applications of this study in a leadership model that may help other technology organizations drive profitable growth and innovation through stronger leadership.

Chapter II: Review of the Literature

In today's technology-driven society, the global hunger for innovative new products has put increased pressure on organizations to think differently. The pressure from shareholders on management to drive innovation and deliver financial results has forced leaders to adapt and look for new solutions to meet this demand. The primary aim of this chapter was to explore the fundamental elements of leadership, review the characteristics that are core to the transformational leadership model, and capture significant life events that provide insight into the leadership, life, and story of Steve Jobs.

Key Characteristics of Leadership

Why are leaders important for an organization? What does a CEO actually do? Leaders, by definition or by title, are individuals in organizations that drive action through perspiration or inspiration, or more commonly, both. Although there are many definitions of leadership, one modern leadership author, Maxwell (1993) simply stated, "leadership is influence" (p. 1). He expanded on this definition to include the "ability to obtain followers" (p. 1). This definition highlights a main component of being able to express oneself while enlisting others to achieve a common goal. Cashman (1999) echoed a simple, yet positive definition: "Leadership is authentic self-expression that creates value" (p. 20). There is no coercive use of power or pressure. Leadership is the simple act of getting a goal accomplished through the help of others.

This act of enabling or enlisting others to achieve a goal without force or duress requires special skills. A former CEO of Hewlett Packard, Carly Fiorina (2000), stated the following during a speech at a graduation ceremony, capturing a key element of leadership:

a leader's greatest obligation is to make possible an environment where people's minds

and hearts can be inventive, brave, human and strong, where people can aspire to do

useful and significant things, where people can aspire to change the world. (para. 31)

This leadership mentality does not require occupying a particular position within an organization

or what Northouse (2004) considered *assigned leadership*. This description of leadership does

not require a higher position.

There is a perception that leadership is management. Northouse (2004) commented,

"When managers are involved in influencing in a group to meet its goals, they are involved in

leadership. When leaders are involved in planning, organizing, staffing, and controlling, they are

involved in management" (p. 10). The act of creating outcomes can be management. Leaders do

manage these activities; however, not all managers are good leaders. Again, Northouse

explained, "According to some researchers, management is concerned with creating order and

stability, while leadership is about adaptation and constructive change" (p. 12). Leadership

impact means thinking like a leader regardless of one's job, delivering on commitments, and

being a role model for others. Leadership means demonstrating passion for work and caring

about the people in an organization. As Zander and Zander (2000) pointed out, "true power is

derived from the ability to make other people powerful" (p. 68). Enabling others, utilizing

personal power to accomplish goals through relationships, is one step beyond management; it is

leadership. As Northouse stated, "Leaders and followers are both part of a leadership process"

(p. 11). Dialogue is created through this symbiotic relationship between the leader and the

follower, regardless of their positions. Isaacs (1999) commented about dialogue, "Dialogue is a

living experience of inquiry within and between people" (p. 9). Isaacs expanded on the process

of communication and how it can be dynamic, yet simple. The concept of actual dialogue is not

only an exchange of information, but as Isaacs stated, it can create power. Isaacs wrote, "We tend to polarize, limit our group intelligence, hold on to our positions, and withhold information that is needed to solve the critical problems that we all face" (p. 52). The sharing of information is one of many forms of power besides the abuse of position that can hinder management well as leadership.

Early theorists assumed that leaders were born, not made (Northouse, 2004). In the 19th and early 20th centuries, these *great man* theories asserted only the upper class male inherited leadership qualities (Kirkpatrick & Locke, 1991). Early in the 20th century, the *great man* theories evolved into trait theories. Trait theories did not make assumptions about whether leadership traits were inherited or acquired; they simply asserted that a leader's characteristics were different from those of non-leaders.

Stogdill (1974) studied more than 124 leadership traits in over 163 studies and found eight common predominant traits. He then conducted a second survey and found ten characteristics linked to personality and situational factors. Northouse (2004) incorporated Kirkpatrick and Locke (1991), Lord, DeVader, and Alliger (1986), Mann (1959), and Stogdill's (1974) studies on leadership and compiled a list of five predominant leadership traits: intelligence, self-confidence, determination, integrity, and sociability. Individual attributes such as general cognitive abilities, motivation, and personality can also be paired with problem solving skills, social judgment skills, and knowledge to create potential leadership outcomes (Northouse, 2004). These outcomes include effective problem solving and performance based on career experiences and environmental influences. Other factors besides individual traits include leader behavior, follower perceptions, role relations, influence over others, and influence on organizational culture (Yukl & Van Fleet, 1992).

Modern trait theory eventually incorporated the concept that anyone could be a leader with no predefined trait prerequisites. An individual may be focusing on his/her strengths or "strongest synaptic connections" (Buckingham & Clifton, 2001, p. 75). Buckingham and Clifton (2001) defined these leadership strengths as "talents, knowledge, and skills" (p. 29). Modern leadership traits are not limited to these abilities, but modern leaders also need to have passion and a purpose. These are positive and ideal leadership qualities. Cashman (1999) asserted that "Purpose is present in how we show up in whatever activity we engage" (p. 65) and that "The purpose of character is to transform and to open up possibilities and potentialities. Qualities of character include authenticity, purpose, openness, trust, congruence, compassion, and creating value" (p. 43). Cashman's focus on character and having purpose is critical allowing all leaders to recognize their role in finding abundance in the work they do every day.

Helgesen (1990) interviewed four successful female executives about their perspectives and common traits, finding the following characteristics: good listening skills, a focus on relationships, different work approaches with different values, emphasizing relationships, and focusing on their voice over their vision. These relationships form the social factors of an organization, including networks and interactions: "the fundamentals of how people interact with one another and how the structures they create impact how they interact with one another" (Maier, 2005, p. 25). This study reinforces the concept that there is no special recipe of specific traits for leaders, nor is it specific to gender or role in the organization. Kreitner and Kinicki (2007) explained that the study of leadership has shifted from that of leader traits to patterns of behavior called leadership styles or qualities. Kreitner and Kinicki described the shifting of leadership studies from *whom the leader is* to *how the leader behaves*. Leadership behavior focuses on the actions of the leader that create impact on others and the organization.

Leadership Theory

Leadership theory has evolved from traits to examining leadership styles throughout the 21st century and has manifested in many forms. The *style approach* looks at a leader's ability to balance task behaviors and relationship behaviors. Task behaviors are focused on manpower and resources, while relationship behaviors focus on assisting employees and employee satisfaction. One well-known model of managerial behavior is the Managerial Grid developed by Blake and Mouton (1985). The Managerial Grid evaluates an individual's concern for production versus a concern for people, depending on the situation. Many researchers believed contingency theory or *situational leadership* to be a universal approach to leadership. Many also held the opinion that all leaders possess a high level of commitment, strength, vision, and charisma. As Northouse (2004) stated, "The essence of situational leadership demands that a leader match his or her style to the competence and commitment of the subordinates" (p. 87). This leadership style would require the leader to be flexible to alter the needed style to the team members and to achieve objectives and deliverables.

Another leadership style that contrasts sharply with situational leadership theory is *authoritarian leadership*. Cherry (2012) concluded, "Authoritarian leaders, also known as autocratic leaders, provide clear expectations for what needs to be done, when it should be done, and how it should be done" (para. 2). This style is prevalent in the military, in a command and control environment where there is little autonomy. This style of leadership:

> places heavy emphasis on task and job requirements and less emphasis on people, except to the extent that people are tools for getting the job done. Communicating with subordinates is not emphasized except for the purpose of giving instructions about the task. This style is results driven, and people are regarded as tools to that end. The leader

in this style is perceived to be controlling, demanding, hard-driving and overpowering.

(Northouse, 2004, p. 69)

There is a clear division between the leader and the followers. Authoritarian leaders tend to make decisions independently with little or no input from the rest of the group. Cherry (2012) emphasized that under authoritarian leadership, decision-making was less creative and more controlling. Lewin also found abuse of this style is usually viewed as overbearing and dictatorial. The authoritative leader wields positional power, can be impatient and reactionary to problems.

Traits of authoritative leadership include the following: seldom lets others make decisions, feels he or she is the most qualified and experienced, considers his or her views to be most valid, lacks confidence in others abilities, critical of differing opinions, rarely gives recognition, is easily offended, action oriented, highly competitive. Those who possess this style of leadership often fail to recognize other people's skills and abilities, often denying others the opportunity to use or exhibit their skills in decision-making venues.

Although there are many perceived negative connotations to this style, the strength of this style is that it does require leaders to act and make decisions quickly in order to resolve issues and control a situation.

One leadership style that is neither situational nor authoritative is George's (2005) *authentic leadership*. George described five dimensions of an authentic leader: purpose, values, relationships, self-discipline, and heart. Understanding one's purpose requires a vision for the future and having a mental model (Senge, 1990) to inspire others towards the potential for an ideal state. Another component of authentic leadership relies on the leader's adherence to a set of principles not only for the individual but also for the organization. This style also values building

and utilizing personal relationships to influence others while demonstrating strong self-discipline, in spite of potential resistance.

According to Isaacs (1999), "The ways we have learned to listen, to impose or apply meaning to the world, are very much a function of our mental models, of what we hold in our minds as truths" (p. 84). Isaacs echoed the thoughts of George (2005) that leaders should be comfortable to be themselves and not have to change their leadership style or beliefs based on the circumstance. The last component of George's authentic leadership model is leading with the heart, not solely relying on pure data to make decisions, but including a sense of empathy and intuition. The elements of George's (2005) authentic leadership style reflect Goleman's (1998) work on emotional intelligence.

The element of being able to connect with others emotionally is a cornerstone to Goleman's work on emotional intelligence or EQ. According to Goleman (1998), "emotional intelligence carries much more weight than IQ in determining who emerges as a leader" (p. 19). Goleman does not discount the importance of basic knowledge, but stresses the ability to connect with people by creating emotional impact. Goleman's emotional competence is "a learned capability based on emotional intelligence result in outstanding performance at work" (p. 24). This competence consists of two abilities: empathy and social skills. Both abilities are connected to the capability to relate to people, inspire them, and be aware of others' feelings or "blind spots" (p. 65). Goleman expanded on his work with emotional intelligence by stating, "roughly 50 to 70 percent of how employees perceive their organization's climate can be traced to the actions of one person: the leader" (p. 18). Goleman's theory on emotional intelligence is relevant to authentic leadership based on assumptions of ideal attributes for a leader.

Additional studies on the role and impact of emotion on leadership ability can be seen in the work of theorists that also examined a leader's impact on the change process. Empirical studies by Huy (2002) and Conger (1998) demonstrated that sensitivity to followers' emotions during the change process appears to partially explain a leader's ability to successfully implement organizational change. Conger asserted that effective change agent leaders, "have a strong and accurate sense of their audience's emotional state, and they adjust the tone of their arguments accordingly. The idea is that you match your emotional fervor to your audience's ability to receive the message" (p. 93). Conger's assertion suggests that a leader's ability to articulate a compelling vision of change may be dependent upon accurate assessment of followers' emotions and emotional regulation, in addition to the ability to express emotional messages. Greenleaf's (2002) work on *servant leadership* also places an emphasis on listening, empathy, awareness, and a commitment to the growth of people. This ability to express an emotional message is a powerful leadership trait. George (2000) described how aspects of emotional intelligence, including the appraisal and expression of emotion, knowledge of emotions, and management of emotions, facilitate a leader's ability to develop collective goals with followers, communicate the importance of work activities to followers, and motivate followers by generating enthusiasm, confidence, and trust. Bass (2002) noted that several aspects of emotional intelligence are critical for transformational leaders who score highly on visionary leadership and individualized consideration. Overall, many leadership scholars agree that the potency of visionary leadership behaviors depends heavily on one's ability to exercise emotional competencies.

Groves (2006) articulated the leader's emotional impact by providing a vision in a more compelling and persuasive manner that results in greater organizational changes than leaders without such skill:

> Thus, a leader's ability to powerfully articulate a compelling and viable vision is critical for initiating organizational change by enhancing followers' openness toward change, collective efficacy to radically transform the status quo, and trust in the leader's vision. In short, the effectiveness of a leader's visionary behavior may be viewed, in part, as the magnitude of organizational changes that are facilitated in the organization. (p. 570)

Groves (2006) expanded on the impact visionary leadership has on organizations:

> Research has shown that visionary leadership positively affects net profit margin, stock value, and follower perceptions of leadership effectiveness. Given convincing empirical support for the impact of visionary leadership on positive organizational outcomes, many scholars have turned their attention to the interpersonal skills and competencies that are necessary for demonstrating visionary leadership behaviors. (p. 567)

These leadership skills and attributes are fundamental components to facilitating. They provide a compelling vision. In order to possess these interpersonal skills, leaders need to be selfless and have a strong desire to communication and influence others at a high level. "White (1959) postulated 'effectance motivation' to mean that there is a biological drive or urge in all human beings to influence." This 'effectance motivation', according to White (1959), is manifested in exploration, curiosity, mastery, and the seeking of an optimum level of stimulation" (as cited in Sinha & Rai, 2004, p. 688). The significance of effectance motivation is to develop an individual's competence or known as mastery. It is this curiosity and motivation for a leader to want to authentically be themselves and inspire others to truly be themselves as they strive to

achieve organizational goals in light of change that lies at the foundation for transformational leadership.

Transformational Leadership

Transformational leadership theories emerged during the late 1980s and early 1990s, signifying a paradigm shift from cost-benefit exchanges to a focus on alternative approaches to motivation. This broader perspective of leadership represented a directional change in leadership theory: from a trait-based approach to a behavioral approach (Bass, 1985, 1990). As the focus shifted to relationships and organizational effectiveness, ideal behaviors were characterized by transforming leaders who sought out a higher need than mere transactions.

Transformational leadership stands in contrast to transactional leadership; the latter focuses on non-collective goals with an individual purpose in mind. Transformational leadership theories were strongly influenced by the seminal work of James MacGregor Burns. Burns (1978) was the first to distinguish transactional and transformational leadership as two distinct leadership styles. The transactional leader utilizs a punishment or reward system of exchange as form of compliance:

> Transactional leadership refers to the bulk of leadership models, which focus on the exchanges that occur between leaders and their followers. The exchange dimension of transitional leadership is very common and can be observed at many levels throughout all types of organizations. (Northouse, 2004, p. 170)

The exchange to which Northouse (2004) referred may be a raise for job well done or be a favor in lieu of support. Transactional leaders use performance as the measure to reward and discipline. Higher-level transactional leaders can persuade followers out of respect, but followers typically do not change their beliefs and goals as a result. (Bass, 1985). The concept of the

implied obligation or a *quid pro quo* mentality is a sharp contrast to that of transformational

leadership style. One study (Bono, Hooper, & Yoon, 2012) addressed "the role of rater

personality in ratings of transformational and transactional leadership. In a naturalistic field

study, we found that rater personality (i.e., agreeableness, openness, extraversion, and

conscientiousness) was positively associated with ratings of transformational leadership,"

(p.132). Bono et al.'s, study continued:

> The best predictor of an employee's motivation, attitude, and behavior (including job
>
> performance) is likely to be that employee's perception of the leader's behavior —
>
> whether that perception is due to systematic biases in attention and recall or actual
>
> observation of leader behaviors. (p. 144)

The role of the leader's behavior does make an impact on the organization. When a

transformational leader engages with another to create a connection with another employee, it

raises the level of motivation and morality in both the leader and the follower. In the

transformational relationship, followers internalize and integrate the leader's goals and values.

Northouse (2004) wrote, "This type of leader is attentive to the needs and motives of followers

and tries to help followers reach their fullest potential" (p. 170). Burns (1978) points to Gandhi

as a classic example of a transformational leader who raises the hopes of millions while in the

process experiencing his own change.

According to Bass (1985), the transformational leader is a leader that can drive change

and alter the organizational culture of an organization. Smith, Montagno, and Kuzmenko (2004)

also suggested that high change environments require the empowered dynamic culture of

transformational leadership. Starting from within, this ideal form of leadership capable of driving

change, as Kegan and Lahey (2001) wrote, "it may be nearly impossible for us to bring about

any important change in a system or organization without changing ourselves" (p. 63). Avolio and Bass (2002) pointed out, "An organization's ability to conceptualize and manage change—to compete from the inside out by increasing its capacity for change—has become a competitive advantage in itself" (p. 91). In order to achieve this competitive edge and stay ahead of the need to change for an organization, transformational leadership is needed. Avolio and Bass expanded the definition of transformational leadership, describing four different components: idealized leadership, inspirational motivation, intellectual stimulation, and individualized consideration.

Avolio and Bass's (2002) first component of transformational leadership is idealized leadership, which they defined as being a role model, a person who demonstrates high moral and ethical standards and shares risks with followers. Idealized leadership is about displaying enthusiasm and optimism, raising team spirit, and being able to communicate expectations clearly with a purpose. Transformational leaders behave in ways that allow them to achieve superior results. Bass (1985) suggested that transformational leaders raise the awareness of those around them and in the workplace and this awareness "requires a leader with vision, self-confidence, and inner strength to argue successfully (p. 16). Transformational leaders "transcend their own self-interests for one of two reasons: utilitarian or moral principles" (Avolio & Bass, 2002, p. 8). This type of influence is the first of Avolio and Bass's four components.

Avolio and Bass's (2002) second component of transformational leadership is being an inspirational motivator. This component deals with providing meaning and inspiring others through optimism and enthusiasm, getting people involved, and demonstrating a commitment to shared goals and visions. This component means being positive and enthusiastic, while transparent at the same time. Northouse (2004) stated "transformational leadership involves an exceptional form of influence that moves followers to accomplish more than what is usually

expected of them" (p. 169). A transformational leader encourages others to look beyond their locus of control and change an internal perspective to think in terms of possibilities. This means inspiring and encouraging others to take intelligent risks; however, it takes a special, highly consistent person to effectively employ this skill.

Avolio and Bass's (2002) third component of transformational leadership is being able to drive intellectual stimulation in others. It is the process of driving a higher level of thinking that helps followers to question assumptions and to generate more creative solutions to problems. The leader's vision provides a framework, or a picture, for followers to see how they connect to the leaders, the organization, and the goal. Once this alignment is established, the follow has parameters to which to execute and can be creative in the approach and seek others in achieving the goals of the organization. When individuals engage others and create connections; they raise the level of motivation and morality in both the leader and the follower (Northouse, 2004). Creating a new vision is part of a cultural change that requires individuals to think beyond themselves; such a task is arduous in itself. Transformational leaders also stimulate others intellectually. These leaders are innovative and creative in their problem-solving skills, as well as in generating new ideas, taking risks, and trying new approaches (Avolio & Bass, 2002). Individuals who take personal risks are more likely to be able to take risks professionally, and vice versa. If individuals can take that first leap of faith, they will find themselves stretched to new potentials.

Avolio and Bass's (2002) last component of transformational leadership is individual consideration: treating each follower as an individual and providing coaching, mentoring, and growth opportunities. Individual consideration involves turning followers into leaders going beyond mere self-interest for the betterment of the organization. Through personal

communication, education, and a strong sense of encouragement, this last component of transformational leadership allows more autonomy for followers (Avolio & Bass, 2002) fostering followers' self-actualization (Robbins, 2005).

Northouse (2004) wrote, "Transformational leaders set out to empower followers and nurture them in change. They attempt to raise the consciousness in individuals and to get them to transcend their own self-interests for the sake of others" (p. 182). Transformational leaders also encourage others to "feel free to offer contrary views and speak the truth" (Bennis & Townsend, 1995, p. 73). In order to create an empowered workforce capable of handling the level of change needed for profitable growth in a technology organization, employees must be able to fail withour fear while having faith and trust in their leader.

Key Characteristics of Transformational Leadership

In order to achieve the level of a transformational leader, as previously mentioned, according to Avolio and Bass (2002) an individual must possess these four capabilities: idealized leadership, inspirational motivation, intellectual stimulation, and individualized consideration. The four elements of transformational leadership may best be described by (but not limited to) the following essential characteristics: the ability to create trusting relationships, being a change agent, being a visionary, being charismatic, and being an advocate of a learning organization.

According to Northouse (2004), transformational leadership mostly involves exchanges between leaders and followers where trust is present. The transformational leader is an individual who considers the needs and motives of followers and promotes an atmosphere that generates a connection, which "raises the level of motivation and morality in both the leader and the follower" (p. 170). Transformational leadership is about having the ability to influence others

by creating mutually trusting relationships. Avolio and Bass (2002) described a leader as someone who can be "admired, respected, and trusted" (p. 2).

Trust can be difficult to achieve, and there is no specific recipe for building trust. Rather, trust is a combination of a variety of factors with which leaders may have to experiment depending on the person. It may require an individual to be present, being consistently available to others, listening and taking the time being a resource. Part of a leader's role is working with people to identify and solve problems. In order to do this, transformational leaders may be required to gain access to knowledge and to create solutions; it can also depend on how much people trust them. Trust and trustworthiness modulate the leader's access to knowledge, and cooperation (Robbins, 2002). As Robbins (2002) stated, people are unlikely to look up to or follow someone whom they perceive as dishonest or who is likely to take advantage of them. Honesty, for instance, consistently ranks at the top of most people's list of characteristics they admire in leaders. A high level of communication and cooperation, which in turn creates a win-win mentality (Covey, 1989), also creates trust. In order to achieve a level of trust, a leader must be able to communicate with others in ways that are easy to understand and relate to.

Empowering others to take control of their sphere of influence while increasing the level of dialogue may potentially raise the level of trust in the relationship. Covey (1989) stated, "Abundance mentality is the paradigm that there is plenty out there for everybody" (p. 219). This mentality is opposite to a "scarcity mentality where individuals have a difficult time sharing recognition and credit, power or profit" (p. 219). Ury (1993) explained, "Everyone wants to identify with some group and have control over their own fate" (p. 117). Ury's comment emphasizes that people do not always want money or something tangible; they want to have

some control and feel a part of the process. Once that relationship is established and information and ideas can flow, leaders can produce synergies in the organization.

Schweiger (2002) described four sources of synergy: reducing cost, increasing revenue, market share, and the many intangibles. By finding these synergies, the organization can adapt and respond to changes in the global marketplace. By establishing trust throughout all levels of the organization, people may be more apt to respond to this need for change.

One element of being a transformational leader is being able to lead change. Being an effective change agent requires one to help others understand, modify, and expand the assumptions they make about their circumstances to see new possibilities. One of the key components of creating the foundation for others to think in terms of possibilities is for people to envision a future state with confidence that they have ownership over their own destiny or an internal locus of control (Robbins, 2005). Once an individual has the perception of power to make a change he/she may experience a sense of personal mastery, which Senge (1990) described as "the discipline of continually clarifying and deepening our personal vision, of focusing our energies, of developing patience, and of seeing reality objectively" (p. 7). Being a change agent starts with enabling one person to think differently, then it evolves to being able to help "direct, align, and inspire actions on the part of large numbers of people" (Kotter, 1996, p. 7).

Taking the time to understand the impact of change on others and giving employees a way to voice their concerns and allowing them to be part of the process. Zander and Zander (2000) described this process as "leading from any chair" (p. 66). Kegan and Lahey (2001) pointed out that "It is difficult to separate ourselves from our perspective that even if our perspective does change…we may be inclined to feel that it is the world rather than our way of

looking at the world that has changed" (p. 71). Kegan and Lahey described the need for a leader to step back from the issue and facilitate the process with others. Cashman (1999) asserted "We have to change. It is part of the price of admission to life. Every moment our atoms are changing; our thoughts are changing; our emotions are changing; our relationships, our finances,-change is endless and constant" (p. 85). The understanding that change is a constant can produce fear. Goleman (1998) said, "Fear- which is not unreasonable…(it) binds people to silence" (p. 284).

Employees have what Senge (1990) called "'mental models' that are deeply ingrained assumptions, generalizations, or even picture or images that influence how we understand the world and how we take action" (p. 80). Maxwell (1993) provided more precise aspects of how people process change, "People change when they hurt enough that they have to change; learn enough that they want to change; receive enough that they are able to change. The leader must recognize when people are in one of these three stages" (p. 63). Going through a change process is often painful and scary. Warren (2002) described this: "There is no growth without change; there is no change without fear or loss; and there is no loss without pain. Every change involves a loss of some kind: You must let go of the old ways in order to experience the new" (p. 220). Leading others through the emotions of loss and fear can be a daunting task as this process does not occur in a vacuum, nor is it one easy step.

Bridges (2003) described managing the process of change in this way: "The neutral zone is thus both a dangerous and an opportune place, and it is the very core of the transition place" (p. 9). The idea of a *neutral zone* describes an organization's "critical psychological realignment" (p. 5). This phase is critical because it is a time of great anxiety when motivation and morale can fall dramatically and when employees may be susceptible to turmoil and loss of teamwork.

Transformational leaders must consider many variables when embarking on change initiatives, regardless of scope. To inspire an ideal future state, transformational leaders are translating, educating, and coaching others throughout the process. When conducting a cultural change, the Sociopolitical Ethical Intercultural and Technological (SPELIT) analysis is a useful tool to evaluate the factors that influence organizational change (Schmieder-Ramirez, 2006). This analysis includes multi-variables such as the social, political, economic, legal, intercultural, and technological factors that impact a change initiative. Because change can produce anxiety and fear, being an effective change agent requires the leader to be able to communicate and connect with people on multiple levels to raise security and comfort levels.

Transformational leaders are visionary. They must be able to connect with any member of an organization, regardless of position, and enable them through the change process. This requires perspective and the ability to connect individuals with a vision of their roles in the future state. As Bridges (2003) stated, "transition starts with an ending" (p. 7). Senge (1990) defined systems thinking as seeing the parts from the whole, reacting to the present and creating the future. It is the process of stepping back and looking at the problem, the market, or the organization and looking at the bigger picture. Indeed, during most significant change initiatives, transformational leaders need to bring a reality check perspective into the equation.

Creating a vision for a team to rally behind requires a foundation of unwavering conviction and confidence as a leader. Typically, transformational leaders are strong role models with firm beliefs and values. They appear competent to followers, articulate ideological goals that have moral overtones, communicate high expectations for followers, and exhibit confidence in followers' abilities to meet these expectations (Northouse, 2004). Confidence in the leader can translate into inspired motivation. As Bennis and Townsend (1995) stated, "A vision conveyed to

the organization through actions brings about a confidence on the part of the followers, a confidence that instills in them a belief that they're capable of doing whatever it takes to make the vision real" (p. 45). Buckingham and Clifton (2001) had this idea, "To rally people toward a better future" (82), by starting a conversation. Wheatley and Frieze (2011) provided:

> Leaders-as-hosts invest in meaningful conversations among people from many parts of the system as the most productive way to engender new insights and possibilities for action. They trust that people are willing to contribute, and that most people yearn to find meaning and possibility in their lives and work. And these leaders know that hosting others is the only way to get complex, intractable problems solved. (p. 2)

Whether this change starts with one or more people, it begins with the vision. According to Kotter, leaders produce "useful change by helping to direct, align, and inspire actions on the part of large numbers of people" (1996, p. 7).

Being able to bond with people is another important part of transformational leadership. Charisma is required for both individual consideration and the intellectual capacity to understand and connect with a variety of people in an organization. Transformational leaders are able to personally connect and engage others either through charm, allure, or pure magnetism; the result is they find themselves accomplishing more through personal connections. This is distinct from transactional leadership where "accepting a favor is as important as giving one. No relationship is one-way street" (Matthews, 1988, p. 75). Creating these relationships with others is just one step. Exhibiting charismatic attributes such as self-confidence, strong will, and a solid moral compass are a few attributes transformational leaders are perceived to possess. Having confidence to present a contrary view or having the fortitude to stand one's ground encourages others. It is possible that people will not make sacrifices, even if they think the potential benefits

of change are attractive, unless they really believe it is safe. Only then will individuals "feel free to offer contrary views and speak the truth" (Bennis & Townsend, 1995, p. 73). Managers are accountable for the growth and development of their people. They should help people satisfy their interests and achieve their hopes and aspirations (Tyler, 1969); however, as leaders they must also know how to motivate and encourage personal growth. The challenge for transformational leaders is to continually expand "awareness and understanding, to see more and more of the interdependence between our actions and our reality" (Senge, 1990, p. 170). Being able to idealize, inspire, intellectually stimulate, and provide individualized consideration as a transformational leader is no easy task. Transformation is possible, but without "credible communication, and a lot of it, employees' hearts and minds are never captured" (Kotter, 1996, p. 9). Capturing the mind of the organization starts with one person.

Cultivating an individual's natural curiosity and desire to learn is considered a significant trait of a leader; however, translating this change on an organizational level may require a transformational leader. Senge (1990) suggested cultivating an individual's desire to learn and tapping into this internal drive is what separates the top organizations from mediocre ones.

Knowles, Holton, and Swanson (1998) defined adult learning as "the process of adults gaining knowledge and expertise" (p. 124). Knowles et al. further indicated that "adults generally become ready to learn when their life situation creates a need to know" (p. 144). Creating a culture of learning starts with initiating the need to know in just one person (Ulrich, 2009). According to Ulrich (2009), "Leaders who encourage individual and team learning can also create organizational learning through these practices" (p. 43). Once a culture of learning is embedded, a transformational leader empowers employees with a sense of freedom (Freire, 2003).

When leaders give employees the opportunity to learn new skills and better themselves, those employees experience an increased sense of pride of workmanship and control over their destiny. Empowered employees with new skills have a higher level of confidence and start to think of possibilities for an organization. Again, Senge (1990) observed, "The discipline of team learning starts with 'dialogue,' the capacity of members of a team to suspend assumptions and enter a genuine 'thinking together'" (p. 10) in the foundation for team learning.

As an organization grows, so does the complexity of the organization. Senge (1990) argued, "Complexity can easily undermine confidence and responsibility" (p. 69). In this process of learning how to be a team, the organization's leaders need to become systems thinkers. Senge argued that systems thinking is needed to help people to move "from reacting to the present to creating the future" (p. 69). Organizations will be more successful with transformational leaders that can harness the intellectual capital to proactively and strategically drive the organization to think systemically.

An organization's viability lies in employees taking initiative and responding to the global pressures for competition while committing to adapting and learning the strategic skills required for creating new process and products. According to Senge (1990), "Increasing adaptiveness is only the first stage in moving toward learning organizations" (p. 7). As Senge asserted, "Learning organizations represent a potentially significant evolution of organizational culture. So it should come to no surprise that such organizations will remain a distant vision until the leadership capabilities they demand are developed" (p. 20). Utilizing what Ury (1993) described as "the use of power to educate" (p. 179), organizations are racing to meet the adjusting market demands. Senge asserted "Superior performance depends on superior learning" (p. 7). By stressing the importance of learning from the top down, the role of the leader in this

learning process is critical for supporting a long-term learning initiative. Senge suggests that leaders are not only teachers, but visionary thinker that can inspire others "to bring to the surface and challenge prevailing mental models, and to foster more systemic patterns of thinking" (p. 9). Leaders are "responsible for building organizations where people are continually expanding their capabilities to shape their future-that is leaders are responsible for learning" (p. 9). Managers are accountable for the growth and development of their people. They should help people satisfy their interests and achieve their hopes and aspirations (Tyler, 1969). However, as leaders they must also know how to motivate and encourage personal and professional growth.

Why Transformational Leadership?

As discussed there are many theories on leadership. There are many ideas on what kinds of motivators, techniques, and traits are required to enact change; however, after reviewing the work of Avolio and Bass; the author chose transformational leadership as an ideal form of leadership to drive profitable growth and innovation. According to Fishman (2005), "Wince-Smith argues that the economy's capacity for innovation. . . is the most important component of competitiveness and economic growth" (p. 275). With eminent adversity in the global marketplace, Fishman captured a key comment from Michael Cox, former head of the Dallas Federal Reserve. He argued that the chief problem for the United States is that "it can stand to export far more manufacturing and service jobs than it does already, provided that Americans have the skills and creativity to offer the world new products and services" (p. 275). In order to achieve this future state, the focus for innovation should be transformational leadership.

There is strong support for transformational leadership as an ideal theory to drive organizational innovation. Scholars have proposed that leadership can effectively stimulate innovative thinking (Zhou & George, 2003). Intellectual stimulation challenges current work

practices and encourages followers to consider different angles as they perform their jobs (Hunt, 1991). Inspirational motivation contributes towards followers' intrinsic motivation, a powerful drive to search for creative ways of addressing changes in managerial processes, practices, or structures (Amabile, 1996, 1998). Due to the prominent role within organizations, leaders affect organizational conditions under which management innovation is generated and implemented (Crossan & Apaydin, 2010).

Organizations can infuse more money and resources into research and development to drive innovation, but that method is not easy and does not always guarantee results. By addressing the management of people and the processes associated with the creation of ideas, Jung, Chow, and Wu (2003) "discovered that transformational leadership displayed by team leaders in charge of research and development project teams in a large R & D organization improved team performance," (p. 5). Sosik, Avolio, and Kahai (1997) reported, "Our study extends the current literature by demonstrating that transformational leadership not only makes subordinates more creative, but it also increases innovation at the organizational level," (p. 22). Herold, Fedor, Caldwell, and Yi (2008) found a positive correlation between transformational leadership and change commitment. Michaelis, Stegmaier, and Sonntag (2010) state, "We found that transformational leadership is also strongly related to followers' innovation implementation behavior and consequently identified another leadership construct which plays an important role in promoting followers' innovation implementation behavior" (p. 420).

Other theorists argue transformational leadership is not an ideal for innovation based on team size. Eisenbeiss, van Knippenberg, and Boerner (2008) examined the impact of transformational leadership on research and development team innovation and found the smaller the team, the more likely innovation will be endangered due to intellectual autonomy. Mumford

and Licuanan (2004) concluded "one cannot expect existing leadership models to be entirely applicable to the leadership of innovative individuals" (p. 170). Leaders can influence innovation in employees by enabling and enhancing such behavior. Previous work indicates that employees' innovative behavior depends greatly on their interaction with others in the workplace, but the leader has a greater impact on innovation (Jong & Den Hartog, 2007).

The numerous thoughts and theories discussed thus far present a diversity of perspectives in the approach to the transformational leadership model. The intent of this study was to use this review of leadership theory as a common platform of definitions and understanding of ideal leader characteristics that are capable of driving innovative profitable growth in a technology organization. Based on these leadership characteristics, the focus shifted to the leadership of Steve Jobs, a leader with a proven track record for driving profitable technology innovation. Of these applicable leadership characteristics, this dissertation transitions to Steve Jobs. To understand the leadership style of Jobs, the researcher reviewed a brief glimpse into the life events that shaped his leadership characteristics and behaviors. This examination intended to discover the main components of Jobs' leadership style as it relates to model for driving profitable, innovative growth for technology organizations.

The Story of Steve Jobs

The story of Steve Jobs is a story about how one man created value by merging technology and creativity. The leadership impact of Jobs spawned life-changing technology products that have changed modern social life. From his parents' garage in 1976 until today, Jobs has had a powerful impact on modern culture's interaction, passion, and obsession with technology products. This creative entrepreneur whose "passion for perfection and ferocious drive revolutionized six industries: personal computers, animated movies, music, phones, tablet

computing, and digital publishing," (Isaacson, 2011a, p. xxi). This is a story of a man and his quest to change the world revealed in five stages of his professional development; from his early beginnings with his first successes with Apple Computer, to his challenges of growing Apple, to his departure from Apple, to his return to Apple, and then to his final legacy. The chronological events that shaped and formed Jobs, the person and the CEO, provides a foundation for a later discussion into the evolution of Jobs' leadership style. This chronological review provides a perspective on the events that shaped one leader's decisions and behaviors that ultimately created an organization with superior shareholder wealth through innovation.

  The beginning. Born on February 24, 1955, Steven Paul Jobs was adopted and raised in a modest lifestyle by Paul and Clara Jobs in Los Altos, California. Isaacson (2011a) wrote, "Abandoned. Chosen. Special. Those concepts that became part of who Jobs was and how he regarded himself" (p. 4). Early on, Jobs was willful and smart. In order to keep Jobs challenged and stimulated, his parents decided to have him skip the fifth grade. Described as intelligent and curious, Jobs starts tinkering with electronics at an early age. He joined a technical club called the Hewlett-Packard Explorers Club. He showed his ingenuity at an early age by building a sophisticated piece of electronics in a frequency counter. From an early age, Jobs demonstrated boldness. When Jobs needed parts from Hewlett Packard, he would call CEO Bill Hewlett at his home. His interests were not limited to electronics; he was just as intrigued with the arts. Jobs loved music, the classics, and art.

  Though not declaring himself a Renaissance man, Steve did begin to expand his mind and experiment with the use of drugs. In high school, Jobs began using marijuana, LSD, and hashish, as well as exploring the mind-bending effect of sleep deprivation (Isaacson, 2011a). Jobs took his first hit of LSD in high school with his girlfriend Nancy Rogers (Moritz, 2010).

Growing up in the 1960s, Jobs gravitated towards an anti-establishment mindset towards school, his parents, and authority in general; he was independent.

Although Jobs was a loner with few friends, he became friends with one man and together they would later change history. Jobs' friend Bill Hernandez introduced him to Stephen Wozniak, or Woz, as he is referred by many. Almost five years his senior, Wozniak shared Jobs' passion for pranks, music, and electronics. Jobs recalled, "Woz was the first person I'd met who knew more electronics than I did" (Isaacson, 2011a, p. 25). Their first project together was a prank on the phone industry with a contraption for making free international calls, named the Blue Box. It would be their first project with Wozniak's design and Jobs' creativity. It was Jobs' skill to "make it user-friendly, put it together in a package, market it, and make a few bucks" (p. 30). This first venture of *productization* would soon end, but the foundation for finding and creating a working partnership between Jobs and Wozniak became revolutionary.

In 1972, after Jobs graduated high school, his parents insisted that he go to college. After visiting a friend in Portland, Oregon, Jobs insisted to his parents that if he were to attend college he had to attend Reed College, a small, liberal, and expensive university in Oregon (Isaacson, 2011a; Moritz, 2010). In college Jobs became interested in spiritual enlightenment and Zen Buddhism. As he recalled, "It placed a value on experience versus intellectual understanding. I got very interested in people who had discovered something more significant than an intellectual, abstract understanding" (Moritz, 2010, p. 98). He also started to believe that intuition formed a higher state of intellect. Jobs would participate in extreme diets, fasts, juicing, and extreme vegetarianism. His commitment to his diet was also reflected in his self-exploration of mind, body, and soul.

Before officially dropping out of college, Jobs would attend only classes that interested him. He took a calligraphy class that would launch him in the intersection of what he called the corner of liberal arts and technology (Isaacson, 2011a). He stated, "It was beautiful, historical, artificially subtle in a way that science can't capture, and I found it fascinating" (p. 41). This class had a profound impact on Steve as all of his future products would be known for combining technology with "great design, elegance, human touches and even romance" (p. 41).

Although Jobs dropped out of Reed College after only one semester, he continued to audit classes that interested him. In 1974 when Jobs was in desperate need for money, he left Oregon to return home to his parents' house and look for a job. Jobs landed a job with Atari and soon thereafter, he told his parents he was going on a spiritual pilgrimage to India with his friend Bill Friedland (Isaacson, 2011a; Moritz, 2010). Upon his return, Jobs reconnected with Wozniak with enthusiasm about creating a computer for the Homebrew Computer Club. At that point Wozniak sold his calculator, Jobs sold his VW bus, and together they joined their friend Ron Wayne, an engineer at Atari, to form a new company (Wayne would later relinquish his 10% stake in the company to Wozniak and Jobs). They divided the work so that Wozniak would do electrical engineering, Jobs would also do electrical engineering and marketing, while Wayne would do mechanical engineering and documentation. With an initial purchase order from a computer retailer called the Byte Shop, they would start production in Jobs' garage. They named this new company Apple Computer, after Jobs' recent return from his friend's apple farm. In addition, Jobs wanted the name to be first in the phone book before Atari (Isaacson, 2011a).

Growing Apple. Simple and elegant was the aim for the first Apple computer; however, growing their business was anything but that. With initial interest growing in the product, Jobs and Wozniak needed capital and in turn had to bring on additional partners. They brought on a

venture capital partner and found a significant investor and a marketing partner in Mike Markkula. Markkula would later teach Jobs about creating business plans and marketing. Through his mentoring, Apple Computer would be on its way towards maturing as a formal organization.

Markkula would teach Steve Jobs his tenets of marketing, termed "The Apple Marketing" (Isaacson, 2011a, p. 33). These principles would become the cornerstone of Jobs' mark on Apple and the mantra that drove his success with Apple:

The first one was empathy, an intimate connection with the feelings of the customer. The second was focus: eliminate all of the unimportant opportunities. The third and equally important was named impute. It emphasized that people form an opinion about a company or a product based on the signals that it conveys. People do judge a book by its cover. If we present them (the company) in a creative, professional manner, we will impute the desired qualities. For the rest of his career, Steve would come to understand the needs and desires of the customers better than any other leader, he would focus on a handful of core products, and he would care, sometimes obsessively, about marketing and image and even the details of the packaging. (p. 78)

In addition to Markkula's marketing support and leadership, the group brought Mike Scott on board to help lead the business as president:

Jobs didn't know whether he wanted to run the show or not. He didn't have much confidence that Woz had much business acumen and was going to speak with him and help, if push came to shove, to keep the company on the right course. He was left in the uncertain position of not knowing how much power he was giving up. (Moritz, 2010, p. 188)

Scott became Jobs' first unbending authority figure (Moritz, 2010).

When the Apple II launched in 1977, it would become the first successful mass-market computer for ordinary consumers (Kahney, 2009). Over 16 years six million Apple IIs would be sold. Isaacson (2011a) wrote, "More than any other machine, it launched the personal computer industry" (p. 84). As Apple continued to reap the Apple II's success, work was already being done on its successor product.

The next generation computer turned into what would become Steve's *project computer*; it was called Lisa. The project name would later be revealed as the name of Steve's biological daughter from a previous relationship that he did not acknowledge, despite passing a paternity test (Isaacson, 2011a).

Looking for the technology for Apple's next computer, Jobs convinced Xerox Development Corporate (XDC) to get into the "Holy Grail of computer research, the secretive Palo Alto Research Center or PARC. The $1 million that XDC had agreed to invest would be in exchange for 100,000 Apple shares" (Young & Simon, 2005, p. 56). PARC engineers developed the user-friendly graphics called bitmapping or graphical user interface (GUI), until then most computers were character-based (Isaacson, 2011a). In addition, the team of visiting Apple employees would discover a revolutionary tool called the *mouse*. This technology would later be replicated and commercialized in the future Macintosh.

In 1979, Jobs had the title of vice president of research and development in charge of the Lisa project. Work was also being done on another computer, the Apple III. Re-organization planned by Scott and Markkula would remove Jobs from the Lisa project and make him a non-executive chairman to remain the public face of the organization, right before Apple's public offering (Isaacson, 2011a).

Apple was growing up. Moritz (2010) reported, "By September 1980, three and a half years after the introduction of the Apple II, 130,000 had been sold. Revenues went from $7.8 million to $117.9 million. Profits had risen from $793,497 to $11.7 million" (p. 257). Apple's payroll exceeded a thousand employees and they had production plants in different parts of the United States, Netherlands, and Ireland.

When Apple Computer went public in 1980, it had the biggest public offering since Ford Motor Company in 1956. At age 25, "Jobs's 15 percent share in the company was valued at $256.4 million" (Moritz, 2010, p. 26). Becoming the figurehead of a now a public company:

> Steve made a conscious decision to become more of a businessman. He was determined to learn what he could about running a company by paying closer attention to the business side of Apple and trying not to buck the system. (Young & Simon, 2005, p. 56)

Aside from learning the elements of business that drove Apple Computer, Jobs found a development project that caught his eye. In February 1981, Jobs asserted control of a group of Apple engineers that he would later call his pirates. This team would take Jobs' attention and they worked toward what would later become the Macintosh computer, but not until three years later.

In 1982, current Apple President Mike Markkula initiated a search for his replacement after a conversation with Steve Jobs:

> Jobs knew that he was not ready to run a company himself, even though there was a part of him that wanted to try. Despite his arrogance, he could be self-aware. Markkula agreed; he told Jobs that he was still a bit too rough-edged and immature to be Apple's president. (Isaacson, 2011a, p. 149)

The firm would eventually find a former Pepsi executive by the name of John Sculley.

Kahney (2009) depicted the rapid rise of Apple, saying, "In 1983, Apple entered the Fortune 500 at number 411, the fastest ascent of any company in business history" (p. 6); however, pressures to perform persisted. The demand to launch the Macintosh following the dismal sales of the Apple III and Lisa was strong. The Macintosh would become a breakthrough product. Despite the growing success of Apple, reflected in the 1982 revenues of $1 billion (Isaacson, 2011a). In January 1984, spear headed by Jobs, Apple created an expensive marketing ad for the Superbowl to re-invigorate the Apple brand that was losing market share to IBM. Kahney (2009) indicated that the Mac became the "first commercial implementation of the revolutionary graphical user interface developed in computer research labs. Steve's stated goal from the very beginning: to create easy-to-use technology for the widest possible audience" (p. 7). The Macintosh marketing launch in 1984 would reinvigorate the brand and propel Apple back to the forefront of the personal computer market.

In technology products, constant innovation is required to maintain customer demand. This would be evident with the eventual slow growth in the sale of the Macintosh. The Macintosh would begin to slow "10% below budget forecast, (Isaacson, 2011a, p. 195). This drop in sales put pressure on Apple's management to make some changes:

> Under Steve's recent power grab, the Macintosh group that had started out as a tight-knit clan of pirates committed to the cause had now swollen to a mondo-division of seven hundred people, with barely a trickle of revenue to pay their salaries and driven by a leader who made decisions on the spur of the moment and changed them just as quickly. (Young & Simon, 2005, p. 108)

The board would recommend that President John Sculley assign Jean-Louis Gassée to head up the Macintosh division. Sculley urged Jobs to agree and focus solely on developing new

technologies and products. Both Jobs and Sculley presented their case to the board of directors and the board sided with Sculley. Shocked and upset, Jobs requested that the transition happen over time and Sculley agreed. Jobs then tried to convince the board Sculley was not the leader for the future and tried to stage a coup to remove him. Despite his efforts, the executive committee would side with Sculley, forcing Jobs nowhere else but out of the organization.

Departure. In August 1985, feeling rejected and abandoned by his peers, Jobs told the board that he would not accept a global visionary role, expressing his interest in starting his own company. One depiction of this event was that Jobs was effectively kicked out for being unproductive and uncontrollable after a failed power struggle with then-CEO John Sculley. Jobs quit before he could be fired. Jobs had it in his mind to start a new company (Kahney, 2009), founding a company called NeXT Computer with the purpose of selling advanced computers to higher education and putting Apple out of business. After trying to convince Apple it would not be competitive, Apple would decide to sue Jobs "for fiduciary obligations," (Isaacson, 2011a, p. 217). Jobs finalized terms with Apple and the suit was later dropped.

On word of Jobs' resignation, Apple's stock went up 7% (Isaacson, 2011a). A statement by the financial markets indicated that Jobs was not ready to lead Apple Computer. On September 17, 1985, when Jobs resigned from Apple Computer, he sold all but one of his 6.5 million shares of Apple stock, worth more than a $100 million (Isaacson, 2011a; Young & Simon, 2005).

At NeXT Computer, Jobs would "indulge all his instincts, both good and bad," (Isaacson, 2011a, p. 219) in his process of forming this new company. From spending $100,000 on the design for the company logo to lavish retreats, NeXT was spending a great deal of money with little to no sales revenue. Jobs put in $20 million of his own money in addition to acquiring Ross

Perot as an investor for a $20 million commitment and Canon for $200 million investment

(Isaacson, 2011a; Young & Simon, 2005). When the NeXT computer finally went on sale, the

organization was prepared for production of 10,000 units a month, but sales were roughly 400

units a month (Isaacson, 2011a). After many years of hemorrhaging cash at a high burn rate, and

selling only 50,000 computers, Jobs and NeXT needed additional investors or a new lifeline for

the business.

In 1986 while at NeXT Computer, Jobs decided to purchase a struggling computer

graphics company from George Lucas. Renaming it Pixar, Jobs propped up the struggling

company for a decade with $60 million of his own money (Moritz, 2010). Focused on high-end

computer aided animation, the market for the hardware and software left sales lacking. Although

the Pixar team would focus on computer animation software, Jobs would demand a simple, user

friendly version to sell to mass marketing organizations. Revenue continued to fall behind

profitability and Jobs was investing more of his personal funds in order to support the business.

With limited success of the animated shorts, Jobs moves ahead with a long-term deal with

Disney. This new partnership with Disney also created an investment in a new animinated

movie project called *Toy Story*. Nine years after Steve purchased Pixar in 1995, the release of

Toy Story would gross $361 million worldwide (Pixar, n.d.). Eventually, after a decade of seven

blockbuster animated movies and several disputes, in 2006 "Disney bought Pixar for $7.4 billion,

thereby making Steve Jobs its largest individual shareholder since Walt Disney himself,"

(Moritz, 2010, p. 334). Before the sale of Pixar, Jobs would still need to save or be saved to

salvage the financial troubled NeXT Computer.

Return. Over the course of time since the departure of Jobs from Apple Computer, the

company employed several CEOs, and during that tenure, Apple faced bloated operating budgets

and lackluster financial performance. Moritz (2010) explained, "When Sculley was fired, Apple was in peril. Apple's market share had eroded, its margins had collapsed; the best young engineers were inclined to apply for openings at companies such as Microsoft, Silicon Graphics or Sun Microsystems" (p. 332). When Apple was slated for a recovery, things got worse:

> In the first quarter of 1996, Apple reported a loss of $69 million and laid off 1,300 staff. In February, the board fired CEO Michael Spindler and appointed in his place Gil Amelio. In the eighteen months that Amelio was on the job, he proved ineffectual and unpopular. Apple lost $1.6 billion, its market share plummeted from 10 percent to 3 percent, and the stock collapsed. (Kahney, 2009, p. 19)

The conditions at Apple became dire and Amelio needed a new operating system for the antiquated Mac operating system.

Although Jobs spoke of wanting to orchestrate a purchase of Apple with his friend Larry Ellison, CEO of Oracle, this only amounted to hypothetical discussions (Isaacson, 2011a). When Jobs heard from current CEO Gil Amelio in 1996 about his interest in NeXT Computer, he discovered his lifeline. Isaacson (2011a) stated, "On December 2, 1996, Steve Jobs set foot on Apple's Cupertino campus for the first time since his ouster eleven year earlier" (p. 299). Amelio convinced Jobs to come on as a special advisor with the sale of NeXT Computer to Apple. Jobs initially wanted more for NeXT and they would eventually compromise. Kahney (2009) reported, "Two weeks later, on December 20, 1996, Amelio announced that Apple was buying NeXT for $427 million" (p. 19). Isaacson (2011a) goes on to state, "Jobs would take $120 million in cash and $37 million in stock, and he pledged to hold the stock for at least six months" (p. 302). Over the next several months, in his advisor role, Jobs became more engaged with the

business he helped build. From product reviews to strategy sessions, he implemented several radical recommendations for immediate implementation.

In July 1997, the Apple Board of directors decided to remove Gil Amelio as CEO and appoint Jobs as the interim CEO or iCEO. One of the first things Jobs did was ask the board to resign with the exception of Fred Woolard, the chief financial officer. The board acquiesced to his request and Jobs filled the board with loyal people he could trust, including his friend Larry Ellison from Oracle. In addition, Jobs would bring his trusted leadership team from NeXT and fill them in top positions in Apple. Jobs realized that without Microsoft Office, the Mac was doomed. Jobs got Bill Gates to "publicly support the company with a $150 million investment, in addition, then pay an undisclosed sum of to settle a patent dispute, rumored to be close to $100 million" (Carlton, 1997, p. 434). Apple would bundle Microsoft's Internet Explorer browser with the Macintosh. The new partnership of these two companies would cross-license their patents as a sign of unprecedented cooperation (Carlton, 1997; Isaacson, 2011a; Kahney, 2009; Young & Simon, 2005). Kahney (2009) asserted, "The investment was largely symbolic, but Wall Street loved it (p. 26). Isaacson (2011a) wrote, "By the end of the day, its stock had skyrocketed $6.56, or 33%, to close at $26.31, twice the price of the day Amelio resigned. The one-day jump added $830 million to Apple's stock market capitalization" (p. 326).

In a 1996 speech, Jobs returned to stage and rallied Apple employees, stating, "We've got to get the spark back" (Carlton, 1997, p. 416). Jobs would continue to shake Apple up. He recommended re-pricing stock options for key employees for retention. He re-launched the brand into the industry with a new marketing tag line, "Think different." to re-energize the brand.

Jobs eliminated the clone business to eliminate Apple as a commodity and not compete with Dell. Jobs revamped manufacturing and inventory by successfully reducing inventories

from $400 million down to $75 million (Young & Simon, 2005). From a product rationalization

standpoint, Jobs reduced Apple's product pipeline to four main product platforms: professional

desktops, professional portables, consumer desktops, and consumer portables. Jobs canceled

hundreds of software projects and almost all the hardware projects (Kahney, 2009).

In addition to streamling 70% Apple's products, Steve Jobs also realigned the structure of

the company. He eliminated management levels and eliminated 3,000 employees (Isaacson,

2011a). When Jobs became the interim CEO (iCEO) in September, 1997, Apple lost $1.04

billion. After two years of staggering losses, Jobs worked to reduce company overhead and get

the company back on track financially. He streamlined Apple's product portfolio and for the

"fiscal year of 1998 it would turn in a $309 million profit. Jobs was back, and so was Apple

(Isaacson, 2011a, p. 339).

Placing additional focus on design, Jobs would find a designer to match the form and the

function of the new iMac. In August 1998, the new iMac became the fastest-selling computer in

Apple history. The new line of products, like the iMac, was later referenced to focus on the

Internet and proved to be a success. Moritz (2010) explained, "In the fall of 1998, Apple reported

annual sales of almost $6 billion and a profit of more than $300 million, compared to sales of

$7.1 billion and a loss of $1 billion at the time he took the helm" (p. 336).

In January 2000, with the success of the iMac, the board of directors of Apple wanted to

reward Jobs for nine subsequent profitable quarters. Apple's market capitalization rose from less

than $2 billion to over $16 billion in the two and a half years since his return. Jobs received

options on 10 million shares of Apple stock, worth $870 million, as well as a Gulfstream V

corporate jet worth an estimated $90 million (Young & Simon, 2005).

By 2001, the dot-com bubble had burst and Apple had revamped its computer offerings, but the company still needed to reinvent itself to stay ahead of the market and the competition. Jobs launched a new strategy centered on the "digital hub" (Isaacson, 2011a, p. 379). While Apple was reviving its core computer business, it created a new technology platform where the computer would no longer be the center of attention. This would revolutionize Apple's new product strategy and platforms, linking pictures, music, video, or what Jobs called the "digital lifestyle," (p. 379). This technology would have its basis in a product developed in the 1990s called firewire, "a high-speed serial port that moved digital files" (p. 380). This shift in thinking brought a shift in focus to portable devices.

By 2000, the majority of the music was downloaded off the Internet and Apple had to catch up to this trend. Instead of building its own music management software and knowing technology trends, Jobs and Apple bought SoundJam in July 2000 and re-launched it as iTunes. This data library software in January 2001 (Isaacson, 2011a) became the foundation for the digital music revolation with the launch of the iPod (Young & Simon, 2005). The Apple team would source a drive from Toshiba and through countless iterations, created the revolutionary track wheel for what would eventually become the first-generation iPod. Jobs would market this product unlike any other in the marketplace. With the design and feel of the product, the product was unique from all its competitors. It had signature white headphones and would have a tagline of "1000 Songs in your pocket" (Isaacson, 2011a, p. 391). Young and Simon (2005) wrote, "On October 23, 2001, Apple was introducing what would turn out to be its most successful product ever" (p. 284). Sales began to take off and the little pocket music player would soon outsell Apple's core products.

The growing issue of music piracy, along with declining CD sales, created an issue in the music industry that Steve Jobs wanted Apple to address and capitalize on: intellectual property. The various music sharing websites were also allowing individuals to download illegal music files with lower quality and the risk of computer viruses. According to Jobs, "You couldn't compete with piracy unless you sold the songs individually" (Isaacson, 2011a, p. 397). The Apple iTunes store was legal and safe. Individuals could download safe, high quality individual songs for 99 cents. This monumental licensing agreement with record companies would give them 70 cents of each sale. It also insured that artists were able to tap into their "digital wallet." Jobs grew the iTunes music library by partnering with various record companies and popular artists. In 2011, Jobs was referenced as the following:

> Jobs did have a thick streak of the enforcer in him…music labels succumbed, offering their songs for 99 cents over iTunes…then Jobs hammered away at the television networks ad movie studios, adding TV shows and movies to the iTunes in 2006 (Stone, 2011, p. 39).

Young and Simon (2005) declared, "The iTunes Music Store had taken over 70 percent of the legitimate download music business" (p.293). Early predictions were that "Apple would sell a million songs in 6 months. Instead the iTunes store sold a million songs in 6 days. It was a turning point for music" (Isaacson, 2011a, p. 403). After a year, the "iTunes Music Store sold an incredible 85 million songs and been named *Fortune* magazine's Product of the Year for 2003" (Young & Simon, 2005, p. 293). In November 2004, Apple announced its financials from the previous quarter; profits were up 37% and iPod sales were up 500% (Young & Simon, 2005).

As Apple sales grew, the product development machine would not stop. Isaacson (2011a) wrote, "One of Jobs's business rules was to never be afraid of cannibalizing yourself. 'If you

don't cannibalize yourself, someone else will" (p. 408). Smaller versions like the Mini and the iPod Shuffle, and features such as larger screens and more memory would feed the growing masses of digital download junkies that began to take great pride in the size of their music library. In February 2006, the online store sold its one-billionth song. When Apple announced its earnings in January 2007, iPod sales comprised half of its gross revenues (Isaacson, 2011a).

At the MacWorld Expo in January 2007, Jobs announced that Apple, Inc. as the new name of the organization to reflect the fact that the company was no longer just a computer company. At these expos and other public events, the buzz about the product was not the only topic of discussion; Jobs' health became center stage. He looked gaunt and unwell (Isaacson, 2011a).

In October 2003, Jobs was diagnosed with a small, treatable pancreatic neuro endocrine tumor. His doctors encourage him to have it surgically removed; however, he refused chemotherapy and surgery. In July 2004, after news that the tumor had grown or spread (Isaacson, 2011a), Steve Jobs issued a letter to Apple stating that he would be taking a leave of absence and putting Chief Operating Officer Tim Cook in charge while he was gone (Isaacson, 2011a; Young & Simon, 2005). Doctors would later discover the cancer spread to the liver and requiring Jobs to receive chemotherapy.

In the fall of 2005, Jobs returned from his medical leave to search for the next line of products to keep Apple's momentum as the frontrunner in the consumer digital space. With iPod sales soaring and the explosion of affordable cell phones, the plan was to create a phone. The initial approach was to modify the iPod with a second secret product underway to build a tablet computer. Apple quietly acquired a Delaware company called FingerWorks that was developing trackpads, buying up all its patents and the services of its founder. Refining the display and

increasing the simplicity of the device, Jobs was obsessed with product. Intent on finding a screen material more elegant than plastic, Jobs searched for a strong glass that was resistant to scratches. Jobs began working with Corning Glass in New York on the production of a revolutionary new type glass. In January 2007, Jobs launched the iPhone as three revolutionary products in one: an iPod with touch controls, a revolutionary mobile phone, and a breakthrough Internet communications device (Isaacson, 2011a). The iPhone was born.

Despite the enormous success of the iPhone, Apples stock drifted from $188 per share in June to $156 per share in July 2008 over growing concern about Jobs' health: "By early October the stock price had sunk to $97" (Isaacson, 2011a, p. 479). By this time Jobs needed a liver transplant, in spite of trying myriad natural and herbal remedies. In 2009 Jobs would take another leave of absence, only to return and prepare for the release of what would become one of his final encore products: the iPad in January 2010. In his departing comments, Jobs stated, "The reason Apple can create products like the iPad is that we've always tried to be at the intersection of technology and liberal arts" (p. 494). Isaacson (2011a) commented, "In less than a month Apple sold one million iPads. By March, 2011, nine months after its release, fifteen million had been sold" (p. 498). Jobs returned to the stage one final time for the launch of the iPad 2 on March 2, 2011, while still being out on medical leave.

Legacy. On August 24, 2011, Jobs submitted a letter to the board of directors stepping down as CEO, recommending Tim Cook to take his position. On October 5, 2011, Steve Jobs died in his Palo Alto home, at the age of 56. The cause of death was complications of pancreatic cancer, Markoff, (2011).

John Sculley stated, "Apple always had the DNA of Steve Jobs, even after he was gone. He says there was a culture at Apple that was almost 'cult like.' It was much more of a cult than

a real company" (as cited in Carlton, 1997, p. 34). From the beginning at Apple Computer, to Pixar, to his resurgence and resurrection at Apple upon his return, Jobs led and defined a new generation of innovators and entrepreneurs of technology. In Jobs' words, "My goal has always been not only to make great products, but to build great companies" (Isaacson, 2011a, p. 443). The legacy and impact of this leader on Apple's ingenious products will be felt for generations.

Summary

This chapter presented a brief overview of the professional life successes and failures of Steve Jobs. The personal interactions and decisions Jobs made were formed by the characteristics of a unique leader that will be remembered for his contributions to advancement in technology and the products that shaped a generation. This chapter also reviewed the fundamental characteristics of leadership based on modern theory. The next section of the chapter focusesd on the transformational leadership model and the various components that define it. The last section of this chapter focused on telling the story of Steve Jobs. His impact in leading technology organizations will remain a case study for years to come.

The next chapter will focus on the methodology of the study and the processes to learn about Jobs and his leadership style.

Chapter III: Methodology

This study utilized a qualitative methodology to examine the leadership characteristics of Steve Jobs captured from articles, books, and various archival data sources. Through a combination of leadership theory and a chronological professional view of a global figure in the field of technology, this study aimed to better understand the leadership required to drive growth, profitability, and innovation.

Restatement of the Purpose

The purpose of this dissertation was to discover what form of leadership characteristics are required to achieve a high performance technology organization. The primary goal was to review and interpret archival scholarly and contemporary literature to understand the key elements of effective leadership in modern leadership theory. After establishing a general knowledge of leadership, the next goal was to understand the main characteristics that comprise transformational leadership. The following goal was to provide insight on the leadership of Jobs, a leader with a proven track record for driving profitable technology innovation. Of these applicable leadership characteristics, this dissertation looked to discover the main components of Jobs' leadership style. This research then presented a new leadership model for profitable growth and innovation for other organizations.

Restatement of Research Questions

The research questions for this study are as follows:

1. Based on the historical review of literature, and from primary and secondary sources, what are the key traits that define the leadership style of Steve Jobs?

2. Over the course of his career, what leadership model(s) would resemble the predominant leadership attributes of Steve Jobs?

This study attempted to present an unbiased perspective of a leader that, at the time of his death, was a prominent, private, very visual public figure to the world. The biographical review explored five stages of his professional development, including his early ideas about leadership with the launch of Apple Computer, his challenges of growing Apple, his failures at his company, his departure from Apple, his triumphant return to Apple, to the creation of a legacy defining a generation and changing the landscape of multiple industries. The leadership style of Jobs can be seen through a review of the chronological events that shaped and formed him a person and a CEO. This historical perspective provided insight to the professional life events that defined the leadership of Jobs. In addition, the study created a foundation for a leadership model that may provide insight for other technology based organizations to develop leaders that are capable of creating cultures of innovation and profitable growth.

Research Design

This longitudinal qualitative study explored the growth and evolution of Steve Jobs over the course of his career. This non-experimental research attempted to understand what occurred in Jobs' past and examined the actions, decisions, and interactions of this man in a descriptive manner. Reviewing the published phenomena that reflect the leadership of Jobs and examining pre-existing leadership theory provided a framework for understanding what type of leadership can lead to the creation of profitable and innovative organizations.

This qualitative study aimed to describe the leadership qualities of Steve Jobs over the course of his lifetime. The skills and behaviors of the subject created a depiction of various practical applications of leadership. The data analyzed revealed the frequency of individual traits and showed general trends and predominant strengths and weakness of the subject's evolving leadership style. Although this study reviewed Steve Jobs' leadership over the course of his life

and evaluated what characteristics were indicative of his style; this study also looked at the body

of leadership research to understand and postulate a leadership model for other technology

organizations to drive a culture of innovaitive and profitable growth.

Nature of the Study

This study examined leadership from a broad subject, then narrowed to a refined

perspective of the type of leadership required to drive innovative profitable growth in the field of

technology. Although there are many studies on leadership theory, what makes this study

different is the subject: Steve Jobs. Jobs was part of a generation of innovators who made an

imprint on modern culture through innovations in computers, consumer electronics, phones, and

movies. His sphere of influence was evident in a multitude of books, journals, magazines,

newspapers, and web articles, all providing insight and context into his life. From interviews, to

third party observations, to industry leaders, the public and the private life of Jobs became public

after his death through dense and varied media coverage.

Research Methodology

This study was a qualitative, non-experimental, descriptive analysis of data from public

archival data sources. The unit of analysis was leadership characteristics. To understand the

leadership of a public figure such as Jobs, this study initiated a scientific inquiry and posed

significant research questions regarding the leadership characteristics of Steve Jobs and the

relevant application of those traits to other organizations. This study evaluated leadership theory

by collecting, reviewing, and decoding existing published archival data. In addition, this study

also followed the same process of reviewing public archival data specific to Jobs, which resulted

in an objective presentation of data. This research stated conclusions and generalizations in the

applied field of leadership theory, addressing the problem statement and answering the research

questions. The research also inspected descriptive data elucidating the achievement, attitudes, and behaviors that typify the leadership of Steve Jobs.

A multi-method strategy validated the leadership theory based on Steve Jobs. Data was collected by examining and identifying different leadership insights throughout his career. All perspectives were presented through the utilization of primary quotes from interviews, conversations, speeches, secondary accounts of observations, and other recorded data. An evidence-based inquiry followed this study with a goal to limit or eliminate errors or biases (McMillan & Schumaker, 2006). Altheide (1996) described how deciphering published data provides additional insight of a subject:

> Context and process are also important for the understanding meaning and message of a document. These meanings and patterns seldom appear all at once; rather, they tend to emerge or become clearer through constant comparison and investigation of documents over a period of time. It is because documents provided another way to focus on yet another consideration of social life–emergence–that they are helpful in understanding the process of social life. Emergence refers to the gradual shaping of meaning through understanding an interpretation. These documents helped to understand the process and meaning of social interpretation. (p. 10)

Altheide's (1996) comments reflect the importance of finding and decoding patterns and additional meaning in second party descriptions of social life. Social life in its simplest form may be seen as the people, places, and activities that are influenced by external forces. By examining the frequency of specific traits referenced in the literature and the impact they made as it related to the leadership of Jobs.

For the purpose of this study, an understanding of the leadership style of Steve Jobs came from secondary sources. Because Jobs participated in a series of media interviews, his ideas personified technology, and his innovations created and formed a new discourse for how people approach technology. The terms *podcast* or *CGI* would not be nearly as well known if not for his leadership in creating consumable technology for the masses. Altheide (1996) continued by saying:

> One reason to study mass media documents is to understand the nature and process by which a key defining aspect of our effective environment operates and to attempt to gauge the consequences. The media are consequential in social life. Numerous studies strongly suggest that the public perceptions of problems and issues incorporate definitions, scenarios, and language from new reports. What we call things, the themes and discourse we employ, and how we frame and allude to experience is crucial for what we take for granted and assume to be true. When language changes and new or revised frameworks of meaning become part of the public domain and are routinely used, then social life has been changed, even in a small way. (p. 69)

Corporate global leaders such as Jobs influence social life and culture. The innovation of a new lexicon and products such as the iPad or FaceTime represent a slice of time where social life was shaped by one man's influence. This study attempted to decode theory and the leadership charactersistics of a global figure. It also tried to create a new understanding of one man's leadership and that of a potential model for other technology organizations with aspirations for growth, profitability and innovation.

The data to support this study came from multiple sources, including electronic searches of academic databases for articles and research on leadership, leadership theory, transformational

leadership, innovation and leadership in technology organizations, as well as sources from within Apple, and comments from Jobs himself. References from these articles yielded even more sources for exploration. Books, periodicals, as well as print and video media also provided additional data points to examine the impact of Jobs' leadership.

The data collected from various authors revealed a prominence of certain leadership traits of Jobs. The first research question was broken down to conduct a methodological review of Steve Jobs' leadership throughout his career. Mirroring the stages of Jobs' professional life, the data was sourced and coded based on themes of leadership characteristics. The triangulated data showed converging evidence of independent sources to raise confidence in patterns through inductive analysis. Based on the frequency of the themes and characteristics that emerged, the content analysis revealed a leader's impact on others, the organizations, various industries and the financial performance of the organizations he lead as well as his impact on popular culture. Table 1 illustrates the approach of each research question.

Table 1

Process for Answering Each Research Question

Research Question 1.
Based on the historical review of literature, and from primary and secondary sources, what are the key traits that define the leadership style of Steve Jobs?
Sources
Archival data based on the following: scholarly reviews, academic journals, periodicals, modern literature, academic literature, published interviews, speeches and third party accounts of individuals that witnessed or who were impacted by the leadership of Steve Jobs. These sources include, but not limited to the following people: employees, colleagues, and business associates.

Research Question 2.

Over the course of his career, what leadership model(s) would resemble the predominant

leadership attributes of Steve Jobs?

Sources
Archival data based on the following: scholarly reviews, academic journals, periodicals, modern literature, academic literature, published interviews, speeches and third party accounts of individuals that witnessed or who were impacted by the leadership of Steve Jobs. These sources include, but not limited to the following people: employees, colleagues, and business associates.

This study presented empirical research on leadership and that of Steve Jobs. McMillan

and Schumaker (2006) commented, "Empirical means guided by evidence obtained from

systematic research methods rather than by opinions and or authorities" (p. 65). Scientific

questions presented were investigated despite the variety of views, thoughts, and opinions on

Jobs' leadership style. By following a coherent and explicit chain of reasoning, this research

provided evidence to prepare conclusions and identified limitations and biases obtained from

systematic research methods rather than by opinions or authorities (McMillan & Schumaker,

2006). This research provided generalized thoughts on leadership. In addition, it spanned across

studies regarding the general population with the goal to provide assertions about the leadership

essential for driving profitable innovation for the CEOs of global multinational organizations.

Analysis of the Data

The qualitative case study contributed to the applied research of leadership and concepts

of the styles and characteristics of effective leadership. The approach reviewed general

leadership concepts with a focus on transformational leadership. Reviewing the professional life

of Jobs was also a data source to be analyzed. Public data was collected and examined, was interpreted and decoded for patterns and discrepancies (McMillan & Schumaker, 2006). The data collected presented various opinions and was vetted for validity using several sourcing techniques. The triangulation of the data included a collection of archival artifacts, literal statements from Jobs and others on actual documented events, as well as secondary sources from informants and personal observations and inferences. Using multiple sources from different researchers increased the validity and reliability by identifying similarities in the descriptive data of leadership traits.

Although the subject was a sample of one person, the reliability of the data on one subject varied considering the traits and characteristics discovered defined the leadership style of Steve Jobs. This study explored personal characteristics of the subject to reflect his leadership style. The data collected described these traits both from a general perspective and those specific to one person. This inductive analysis consisted of a systematic process of coding, categorizing, and interpreting data to provide an explanation on the phenomenon of leadership. The data recorded included broad generalizations of leadership as well as specific examples of approaches and characteristics. The data identified reoccurring leadership themes and topics through an exhaustive review of leadership theory. The data was then coded and categorized for similar concepts to led to further inquiry. Different sources of data from various authors with contrasting views revealed biases that may affect reliability and usability of the sources. In addition, mass media documents revealed the nature and process by which public perceptions of visible leaders changed over time. This study involved a longitudinal review of the leadership lifespan of Jobs and his influence on the world.

Institutional Review Board

This study followed the guidelines outlined by the Institutional Review Board of

Pepperdine University. This non-interactive research design consisted of analysis of archival data

to provide an understanding of the basic fundamental concepts of leadership and

transformational leadership and a case study on the professional life of Steve Jobs. This study

did not gather any information directly from human subjects, thus eliminating all interactions,

communication, and personal contact with a live individual. The data collected did not reveal any

private information. This concept analysis of leadership involved the collection and evaluation

of public documents, studies, interviews, books and other documented first and second hand

account of the real life events of the leadership of Jobs. This systematic investigation contributed

to a broader knowledge of leadership by providing into an influential, public figure that led

technology innovation that shaped modern use of technology. The insights of his leadership

presented keen insights to what other organization may seek to develop in their leaders.

Significance of the Study

This descriptive study explored achievement, attitudes, behaviors, and characteristics that

describe a general concept of leadership. This review of leadership theory captured the concepts

of historical theorists as well as contemporary thought leaders. The thoughts and perceptions of

Jobs incorporated provide a valued perspective as a world renowned figure in profitably growing

innovation for technology organizations. This case study explored new phenomena in the

patterns of collected information.

From a practical standpoint, this research may be used to teach other leaders and

organizations on how to profitabily grow and drive innovation. This study presents data on

leadership characteristics rooted in theory and in practice that if applied to a curriculum, could

build off existing leadership training programs to enhance leadership skills for current and future leaders. From an educational perspective, this study may give organizations and leaders a new perspective on the thought processes from historical thought leaders as well as practical applications from the life of Steve Jobs.

From a methodological perspective, this dissertation had many limitations as well as opportunities for creating an impact on the study of leadership. The subject, Jobs, was only a sample size of one, thus the leadership insights from one individual to learn from based on his sphere of influence, global reach of products, and notoriety as a pioneer. Additionally, this study was based on specific quotes, comments, and stories about a historic figure that can no longer be interviewed. This study formed multiple lessons of the leadership based on a review of experiences, decisions, and interactions in the professional life of Jobs. From the theoretical, to the contemporary, to the practical, the study intended to supply multiple views of leadership.

Summary

The purpose of this chapter was to outline the methodology processes of this qualitative study on leadership and Steve Jobs. This chapter described the data collection process as well as the process of sourcing data, decoding it, and interpreting the results. The study's findings in the following chapter presented additional information on the leadership path of Jobs and his phases of leadership discovery. This chapter also provided a roadmap for understanding the characteristics and leadership style of Steve Jobs to answer the research questions.

Reviewing a figure such as Jobs who left a profound imprint on the world tends to yield a variety of perspectives both positive and negative. The next section of this paper will give a chronological review of Jobs' professional life leadership experiences that enabled him to create one of the most valuable companies in the world. This story draws from multiple sources that

make diverse claims about who this man was and what constituted his leadership style. From the

many interviews and first hand accounts from people that worked for and with Jobs this study of

leadership and biography created insight for other potential technology organizations.

Chapter IV: iLeadership:
The Leadership Style of Steve Jobs

In the current global economic climate, the pressure to innovate and create new products and services to stay competitive remains a top strategic priority for most global organizations. As technology companies continue to try to stay ahead of the technology curve, the CEO's of these organizations have acknowledged this need for change.

The global consulting firm, PriceWaterhouseCoopers, conducted a market survey called the 2012 Global CEO Survey. The organization sent a survey out to 1,258 CEOs in 60 different countries in the last quarter (October, November, December) of 2011 (Snowden, 2011). In addition, they also spoke to 38 CEOs face to face to inquire about opportunities and challenges facing their businesses. The survey asked CEOs if they were changing their overall innovation portfolio and 69% of respondents confirmed innovative changes in their products and services is a priority for their business. The survey also revealed an increased emphasis in the technology sector, four basis points higher, at 73%. This investigation focused on the need for CEO's to have to right leaders in their organizations capable of driving profitable innovative change.

The PWC Global CEO Survey reveals technology organizations have a greater priority to focus on innovative new products and services in their existing business models. The survey also reveals that CEO's place a greater emphasis on these new products to tap into new business models versus looking at cost reductions to preserve market share to harvest an existing technology.

The leadership challenge in global technology based organizations is to have leaders who know how to harness the creative energy of the existing human capital. One CEO who was not in the previous survey, but drove profitable and innovative growth was Steve Jobs.

In order to thoroughly understand the leadership style of Jobs, and understand his leadership traits, the research broke his leadership life lessons into five phases of his career: (a) the beginning of his career launching Apple, (b) a second phase linked to the leadership challenges of growing Apple, (c) his fall that led to his departure, (d) his return and rejuvenation of the Apple brand and Pixar, and (e) his legacy, or the twilight of his career.

Stage I: The Beginning

To understand the leadership of Jobs this study goes back to the beginning of the Apple journey. Over the course of Jobs' career, he experienced many challenges that shaped his interaction and leadership of others. Starting from an unorthodox beginning for a CEO of a global corporation, Jobs was a college dropout, a free spirit with ideals to want to change the world, but needed to bump into Steve Wozniak to begin that process.

When Jobs and Steve Wozniak started Apple in their parent's garage, they agreed Jobs would do the marketing and Wozniak would build the computers. Although not as technically savvy, according to Wozniak, Jobs was deeply involved in the design of the first computer housing (Butcher, 1998). Jobs was adamant about the aesthetics. He wanted the computer to be attractive to future common buyer (Butcher, 1998).

The design, look and feel was a concern for Jobs from the very beginning. His love for design and detail became a trademark for Jobs. Jobs developed his love of style at an early age with the desire of being a perfectionist (Butcher, 1998). Jobs' drive for perfection included caring about the craftsmanship for the parts unseen to the consumer. His commitment to perfection remained throughout his career and he demanded it from others. Smolowe (2011) captured from a former Apple engineer that Jobs encouraged others to develop new ways of looking at design. Jobs was such a perfectionist that people could never please him (Butcher,

1998). When Jobs did not receive perfection, he was often "cold and brutal," (Isaacson, 2011a, p. 64). Jobs said in an interview with Fortune magazine, "My job is to not be easy on people. My job is to make them better. My job is to pull things together from different parts of the company and clear the ways and get the resources for the key projects. And to take these great people we have and to push them and make them even better, coming up with more aggressive visions of how it could be" (Morris, 2008, p. 25). Jobs' quote shows how his belief of being very critical of others on tasks and deliverables would inspire them to greatness. Isaacson (2011a) wrote "Jobs was a perfectionist who craved control and indulged in the uncompromising temperament of an artist," (p. 173). Jobs' obsession with perfection impacted his ability to lead the small Apple start up.

As in his early days at his first job with Atari, the perception of Jobs was "temperamental and bratty, as well as quite argumentative and increasingly tyrannical," (Isaacson, 2011a, p. 81) and "arrogant" (Alvey, 2011, p. 22). According to numerous sources, Jobs would tell people their ideas were worthless or stupid (Isaacson, 2011a). Although Jobs was bright, he did not have all the answers. He was young and not ready to lead the organization. Apple's first president, Mike Scott, who became Jobs' first boss at Apple, noted to Isaacson what he predicted about Jobs, "(His) desire for control and disdain for authority was destined to be a problem," (2011a, p. 83). Isaacson commented, "Jobs controlled the hiring process. He looked for people who were creative, wickedly smart, and slightly rebellious," (p. 142). Jobs said, "All we are is our ideas, or people. That's what keeps us going to work in the morning, to hang around these great bright people. I've always thought that recruiting is the heart and soul of what we do," (as cited in Beahm, 2011, p. 20). Jobs had a vision. It was clear to Jobs his passion was around ideas and being surrounded by bright people who were excited about the challenge to push

technology to new levels of thinking. Although Jobs would frustrate people with his desire for control (Isaacson, 2011a), he had a strong ability to portray a vision of changing the world through advancements in technology.

Jobs emulated a vision for Apple and its employees from the very beginning that inspired action. The vision for innovation Jobs had at Apple could be compared to elevating employees' hierarchy of needs (Robbins, 2005). From recruitment to retention, employees do not come to work for a paycheck. As Kawasaki (2004) stated, "For many people, money isn't the most important reward of the job. They will work for less to do more by making meaning and changing the world" (p. 106). Jobs tried to give his employees meaning to their work. He drove Apple employees into thinking they can make impossible tasks seem possible (Zander & Zander, 2000). Jobs stated in his commencement speech to Stanford graduates, "Your work is going to fill a large part of your life, and the only way to be truly satisfied is to do what you believe is great work. And the only way to do great work is to love what you do. . . Don't settle" (Jobs, 2005). Jobs created a vision for employees to come to Apple Computer and do great work. As Bennis and Townsend (1995) stated, "A vision conveyed to the organization through actions brings about a confidence on the part of the followers, a confidence that instills in them a belief that they're capable of doing whatever it takes to make the vision real" (p. 45). Young and Simon (2005) reported, "Steve could infuriate his employees but at the same time stand on a pedestal as the creator of the dream and the culture, the crusader leading the charge. He was the guy who kept the Apple polished" (p. 49).

Jobs would be the visionary and excite others about the potential. Walter Isaacson (2011a) concluded:

Apple employees with an abiding passion to create groundbreaking products and a belief

that they could accomplish what seemed impossible. They made T-shirts that read '90

hours a week and loving it!' Out of fear of Jobs mixed with an incredibly strong urge to

impress him, they exceeded their own expectations. (p. 124)

Kahney (2009) wrote, "Larry Tessler, Apple's former chief scientist, said Jobs inspired equal

measures of fear and respect" (p. 23). Andy Hertzfeld, a former developer who helped build the

Macintosh, told Moritz (2010) that Jobs inspired without inspiring much love. Alvey (2011) also

recorded thoughts of another early employee, Guy Kawasaki, who mentioned that "the people at

Apple had a name for that behavior, too: 'the shithead hero roller coaster'" (p. 25). Former

programmer, Bill Atkinson, referenced the contradiction in personality:

He could infuriate people he worked with every day, he could change his mind with

startling frequency, yet he could keep the fires burning in the head and hearts of the

brightest people in the company…Steve has a power of vision that's almost frightening.

When Steve believes in something, the power of that vision can literally sweep aside any

objections, problems, or whatever. They cease to assist. (Young & Simon, 2005, p. 62)

As Apple grew, it became a more dynamic organization, as did the requirements of being more

than a visionary, but also an organizer and manager of people.

Stage II: Growing Apple

Apple would soon become a public company and the pressures for the company to

change came with new challenges. Apple and Jobs faced new growing pains. When investors

brought in professionals to help the leadership team, Jobs would be required to adapt and find a

new way to lead and channel his creative abilities. Mike Markkula would come in and teach Jobs

what he called the Apple marketing philosophy. It was a one page mantra on marketing that he

would teach and foster in Jobs. This mantra had three components: (a) empathy for the customer, connect the feelings with the customer; (b) focus and eliminate the unimportant things in life, simplify; and (c) we will impute the desired results or basically the idea the customer will form an opinion of the book by its cover. Image was everything. From packaging to the look and feel of the marketing message, own or control that experience (Isaacson, 2011a). Branding became a cornerstone of Job's many passions. Weiss (2002) stated, "Branding never takes place in a vacuum. It occurs in an environment that can be influenced and even partially controlled. You have to thoroughly understand your brand's environment or it might be inappropriately dressed, prepared, or depicted" (p. 132). Furthermore, Weiss stated, "Brands should not be formulated based on current strengths or historical successors, but rather on future buyer need" (p. 133). Jobs embraced his challenge as a marketing leader. He said, "We don't stand a chance of advertising with features and benefit and with RAMs and with charts and comparisons. The only chance we have of communicating is with a feeling" (as cited in Beahm, 2011, p. 23). Jobs wanted control and he relied on his intuition and experiential wisdom (Isaacson, 2011a) to develop products and decide what products he thought would be popular among his customers. As Young and Simon (2005) pointed out, this self confidence and drive to follow his heart was evident, as he did not pay attention to market research and financial indices. Sculley (2011) indicated, "It was always about design. It was also always about taste. Steve's taste, that is, as he controlled every design decision" (p. 27). Despite Jobs desire to control, it was his ability to be in control via his charisma.

Because of his charisma, Jobs would will Apple's destiny. Jobs was always charismatic, but as Apple grew, his stage presence became mesmerizing. Former Apple employee, Trip Hawkins said, "He knew how to modulate his voice. He always knew how to get an audience in

the palm of his hand in seconds—to get them into a story that's emotionally interesting. Then

he'd bring his voice down, so people are hanging on every word" (as cited in Alvey, 2011, p.

24). Long time friend and business partner Steve Wozniak was quoted by Isaacson (2011a) as

stating "Jobs had a bravado that helped him get things done, occasionally by manipulating

people. He could be charismatic, even mesmerizing" (p. 64). Butcher (1998) captured the

feedback of Trip Hawkins, saying, "Steve can be very charismatic person, but he is extremely

ambitious, almost to the point of megalomania" (p. 123). Jobs could entice and excite a crowd.

Carlton (1997) wrote, "Steve had a smooth stage presence. He had a mesmerizing effect on his

audience. Captivate a crowd like a preacher" (p. 8). Jobs also possessed a wielding influence

over others.

Most knew Jobs has his own form of reality. Alvey (2011) concurred, writing, "Jobs's

inexplicable hold on people has a name, the 'reality-distortion field.' It was a sardonic term,

because once you left the reality-distortion field all jazzed and ready to put in another 20-hour

day, you remembered that the guy could be such a jerk" (p. 24). Jobs could convince people they

could do the impossible. When Macintosh group, mastered unrealistic goals to build a prototype

in a very short time table, one programmer, Bud Tribble, referenced Jobs' magical, uncanny

power of persuasion to have the team accept his timetable, Young and Simon (2005) wrote, "He

has the ability to make people around him believe in his perception of reality" (p. 71). In

Isaacson's (2011a) biography, he stated:

> To some people, calling it a reality distortion field was just a clever ways to say that Jobs
>
> tended to lie. But it was in a fact a more complex form of dissembling. He would assert
>
> something-be it fact about world history or recounting who suggested an idea at a
>
> meeting-without even considering the truth. It came from willfully defying reality, not

only to others but to himself. At the root of the reality distortion was Jobs' belief that the

rules didn't apply to him. (pp. 118-119)

Jobs' own sense of reality justified his decisions as a leader was correct. Jobs ability to convince

people to do as he commanded would soon face a new reality.

Stage III: Departure

Maccoby (2001) commented, "Narcissists, Freud told us, are emotionally isolated and

highly distrustful. They are usually poor listeners and lack empathy" (p. 1). Many obsevers and

colleagues would describe Jobs as such a person. In the next phase of his life, Steve Jobs would

get results, but often through unsettling means. This period of his life would define him. It would

destroy him and resurrect him anew. There was no question; Jobs would make snap decisions

about people. If he thought you were smart and that he could learn something from you, he'd put

you on a pedestal. But most people weren't good enough for him and many would be in a state of

shock after encounters with Steve (Butcher, 1998). Poniewozik (2012) wrote, "When his group

failed to make progress fast enough, he fired off irate memos and abrasively talked down to

middle managers. Halfway through the project, he demoralized the designers by demanding that

they produce an entirely new look" (p. 52). Jobs described this relentless pursuit of perfection,

"It's painful when you have some people who are not the best people in the world and you have

to get rid of them; but I found my job has sometimes exactly been that- to get rid of some people

who didn't measure up and I've always tried to do it in a humane way. But nonetheless it has to

be done and it is never fun" (as cited in Beahm, 2011, p. 41). This was indicative of times past

when Jobs treated his Mac team poorly by pushing them to the limit. They were underpaid in

comparison to their Lisa counterparts, yet worked 90-hour weeks. He lost their trust (Young &

Simon, 2005). Kahney (2009) wrote, "Like other great intimidators, Jobs was forceful. He

pushes and cajoles, often quite hard. He can be brutal and ruthless. He's willing to use 'hard power' to put the fear of God into people to get things done" (p.159). Alvey (2011) states, "Everyone at the company knew Jobs was brilliant, but there were too many tirades and humiliations to let him really run the company" (p. 25). As another example "As the Macintosh continued to disappoint--sales in March 1985 were only 10% of the budget forecast--Jobs holed up in his office fuming or wandering the halls berating everyone else for the problems. His mood swings became worse, and so did his abuse of those around him. He was frequently obnoxious, rude and selfish" (Isaacson, 2011a, p. 194). Alvey (2011) quoted Arthur Rock commenting to the *Institutional Investor* two decades later, "Back then he was uncontrollable. He got ideas in his head, and the hell with what anybody else wanted to do. Being a founder of the company, he went off and did them regardless of whether it ended up being good for the company" (p. 26). When Jobs belittled someone publicly, his colleagues would try to give him feedback and tell him he was doing more harm than good. "He would apologize and acknowledge it and then say 'It's simply who I am'" (Isaacson, 2011a, p. 463). Jobs did not display very much of an emotional quotient. Isaacson (2011a) summed up this phenomenon regarding Jobs this way:

> Even his family members wondered whether he simply lacked the filter that restrains people from venting their wounding thoughts or willfully bypassed it….When he hurt people, it was not because he was lacking in emotional awareness. Quite the contrary: He could size people up, understand their inner thoughts, and know how to relate to them, cajole them or hurt them at will. (p. 565)

Jobs interacted with industry colleagues with the same level of intensity. "Former chairman of Lotus software, Mitch Kapor, later commented about Steve Jobs. He said, 'Human relationships were not his strong suit'" (Isaacson, 2011a, p. 224).

Young and Simon (2005) wrote, "The battle for hearts and minds of Steve's own people was only part of the problem. Though Apple was universally considered a leader and an innovator in the world of personal computers, it was widely distrusted as a result of its inconsistent performance, not to mention the behavior of its chairman," (p. 103). Again, Isaacson (2011a), Apple's board of directors, especially venture capitalist Arthur Rock, came around to thinking something had to be done about Jobs. When the board sided with Sculley amidst his mutual fallout with Jobs, Jobs would resign. Jobs left Apple on September 17, 1985 (Isaacson, 2011a). As a reflection of the investment community's lack of confidence in Jobs to lead the organization, "Apple's stock went up a full point, or almost 7%, when Jobs's resignation was announced" (Isaacson, 2011a, p. 217). When Jobs left he stated that he would do what he considers his strengths, "Find talented people and make things with them," (Isaacson, 2011a, p. 218); as it turns out, that is exactly what Jobs did next.

It seemed fitting that the name of the company Jobs would start was called NeXT. After selling all of his Apple shares with the exception of one, Jobs was devastated. He was ousted from the company he started (Isaacson, 2011a). Jobs indulged in his fantasies with NeXT and spent so much money with little to no income that he had to fight to find investors to keep the business afloat. As an example, at NeXT it was perceived the company was not yet commercially viable and though the 'factory was primed to churn out ten thousand units a month, sales were about four hundred a month,' (Isaacson, 2011a, p. 237). Having started this venture, Jobs also bought an animation and computer graphics company from George Lucas as another software company with potential to change the world. This company struggled to remain in business with an inconsistent revenue stream. With both of his companies consuming all his time and money, Jobs had to start over yet again.

During this time something interesting happened to Steve Jobs. Jobs would tell Stanford's graduating class at commencement speech in 2005 that "I didn't see it then, but it turned out that getting fired from Apple was the best thing that could have ever happened to me. The heaviness of being successful was replaced by the lightness of being a beginner again" (para 11). Jobs' only assessment enabled him to look at the world differently.

Stage IV: Return

During the interim period of time that Steve Jobs was not working at Apple, both he and the organization experienced change. Jobs was in need of financing to support his two companies: NeXT and Pixar just at the same time that Apple came back to Jobs with an interest of purchasing NeXT for its software. With a sense of vindication with Apple's interest in buying NeXT and asking Jobs to return as an advisor; he was a changed man.

Bridges (2003) explained "Transition begins with letting go of something" (p. 8). Bridges captured this concept of loss as part of the process for change. As Matthews (1988) wrote, "You cannot afford to be a solipsist, someone who believes he exists alone in the world. Focusing on your own ego is a guaranteed failure" (p. 59). Whether it was his hurt feelings, ego, or his failing companies, it was clear that Jobs had acquired a new mental model (Senge, 1990).

This new mental model of leadership started to take shape and created a new Steve Jobs upon his return to Apple. Surowiecki (2011) states, "When Jobs returned, he still wanted to 'own and control the primary technology,' but his obsession with control had tempered" (p. 29). When Jobs returned to Apple he restructured the organization, streamlined product development down to the critical few projects, and focused on financial as well as product performance (Young & Simon, 2005). Sculley (2011) wrote:

Steve's 'first principles' from those early days never changed. Steve would say the hardest decisions are what to leave out, not what to put in. He was the ultimate systems designer. Jobs was always simplifying. Everything began and ended with the user experience. Simplify the steps. 'Look, we can do it in three steps. … Not good enough, do it in one step.' Simplify, simplify, simplify. Sound familiar? This was Steve Jobs in 1983! (p. 27)

Jobs streamlined the organizational chart to a make it simpler and direct (Kahney, 2009). Jobs stated he wanted the organization to be, "clean and simple to understand, and very accountable. Everything just got simpler. That's been one of my mantras- focus and simplicity," (as cited in Beahm, 2011, p. 31). As Jobs reduced headcount and product lines in his return to Apple to profitability, Young and Simon (2005) described that an "aura of fear Steve carried with him like a dark cloud" (p. 235). The change process that Apple was going through was led by Jobs and it was a shock to the culture. Jobs discovered that the large engineering force was "rewarded for being imaginative and inventive, not for the difficult job of knuckling down and making things work" (Kahney, 2009, p. 23). Young and Simon (2005) suggested, "It would be easy to call this a reign of terror, but the fact is that the company began to turn around" (p. 236).

Jobs focused the organization to say no to projects–as an example he reduced multiple product lines down to four (Isaacson, 2011a; Young & Simon, 2005; Moritz, 2010). Jobs stated, "People think focus means saying yes to the thing you've got to focus on. But that's not what it means at all. It means saying no to the hundred other good ideas that there are. You have to pick carefully. I'm actually as proud of the things we haven't done as the things I have done. Innovation is saying no to 1,000 things" (as cited in Beahm, 2011, p. 43). Isaacson captures this

change in Jobs in this phase of his life, "He let go of his control –freak desire to manufacture

products in his own factories and instead outsourced the making of everything" (2011a, p. 359).

Burrows (2011) described this period of time in Jobs' life:

Despite the occasional outbursts, a wiser, more effective Jobs was rapidly emerging.

What Apple seemed to have in Jobs 2.0 was all of the features that made the young Steve

Jobs great—charisma, vision, rigorous standards—with some new functionality, too. If he

wasn't softer, Jobs was at least more considerate; he ended company speeches with

thanks to employees and their families for putting up with the grueling hours. (p. 34)

Smolowe (2011) referenced two Jobs, one who got through out of his own company as a brash,

"stubborn, pigheaded and the one who returned and grew up a lot" (p. 67). Part of the focus, Jobs

emphasized, was the understanding that he needed help.

Sculley (2011) commented "Steve loved to talk through an idea. I remember him saying,

'Great companies must have a noble cause. Then it's the leader's job to transform that noble

cause into such an inspiring vision that it will attract the most talented people in the world to

want to join it'" (p. 27). Kahney (2009) noted, "Jobs paid careful attention to find the talent on

the product teams, even if they weren't running the show" (p. 36).

Jobs understood Apples's competitive advantage from day one, and he insured that it

remained the focus of the staff of the company.

As cited in Beahm (2011), Jobs was quoted as saying:

 You need a very product-oriented culture, even in a technology company. Lots of

companies have tons of great engineers and smart people. But ultimately, there needs to

be some gravitational force that pulls it all together. Otherwise, you get great pieces of

technology all floating around the universe. But it doesn't add up to much. (p. 43)

Jobs' return to Apple was about reorganizing the resources around effectiveness and streamlining

a large business into one more manageable. Ulrich (2009) stated:

> Capabilities shape the way people think about organizations. In other words,
>
> organizations are known not for their structure but for their capabilities. Capabilities
>
> represent what the organization is known for, what it is good at doing, and how it patterns
>
> activities to deliver value. The capabilities define many of the intangibles that investors
>
> pay attention to, the firm brand customers relate to, and the culture that shapes employee
>
> behavior. The capabilities also become the identity of the firm. (p. 36)

Jobs reinforced Apple's capabilities and rebuilt his leadership team with people he trusted, some

of whom came from NeXT and others he hired externally (Isaacson, 2011a). He hired Tim Cook

to lead the details of operations and supply chain. Cook would become one of his top lieutenants.

Jobs wanted to secure top technical talent by re-pricing stock options for key employees and said

to the board, "You brought me here to fix this thing and people are the key" (Isaacson, 2011a, p.

318). His insistence on this highly regulated system without a formal process under Securities

and Exchange Commission (SEC) guidelines required that Jobs pay a fine. Jobs willed actions

with brute force. He reduced inventories, ordering distributors to cut inventory 75%" (Isaacson,

2011a, p. 359). Jobs returned Apple to profitability, nine successive quarters, with an increased

market share from $2 billion to $16 billion; the Apple board rewarded Jobs with a jet and a

million shares of stock. (Isaacson, 2011a; Young & Simon, 2005). With new products such as

the iMac and the iPod and iTunes, "Apple beat Wall Street's expectations by 30 percent, on

average, since 2006" (Burrows, 2011, p. 34). In addition to his successes at Apple, things at

Pixar also turned positive. Between his time at Apple and Pixar, Jobs realized he had businesses

that needed help:

Jobs wasn't born to the movie business, but he'd surround himself with creative people during his days at Apple. Jobs would also win respect for knowing the limits of his expertise and agreed to stay out of all the story meetings. (Burrows, 2011, p. 32)

Corliss (2012) commented, "Say this for Steve: the Apple micromanager was smart enough to know what he didn't know. Jobs proved his genius at Pixar, by letting Lasseter and his gang do its own thing" (Corliss, 2012, p. 41). The team at Pixar would generate a hit in *Toy Story* and Jobs negotiated a three picture deal with Disney, which would turn into a mutually financially rewarding relationship (a new contract with seven films) before an initial public offering (IPO) and a Disney "purchase for $7.4 billion in stock" (Isaacson, 2011a, p. 441). Drucker (2001) said, "Successful innovators use both the right side and the left side of their brains. They look at figures, and they look at people. They work out analytically what the innovation has to satisfy an opportunity" (p. 278). Pixar would be his retreat from the other challenges he faced at Apple. Steve Jobs referenced Pixar, "connecting art with technology" (Isaacson, 2011a, p. 441). Unfortunately, while both businesses seemed to turn around, Jobs's health did not.

In 2004, Steve Jobs left to undergo surgery to remove a cancerous tumor on his pancreas while putting Tim Cook in charge of Apple (Isaacson, 2011a). After Jobs returned from his medical leave, he thanked the employees and their family of Apple for all of their hard work. He showed his new found wisdom. Young and Simon (2005) wrote:

It was a new Steve: a man who no longer believed that the world started and stopped with what he was interested in. This was a man who still had qualities of his youth-good and bad--but they had been leavened with time and wisdom and experience. (p. 233)

Jobs mentions his experience with death at his Stanford commencement speech, "Death is very likely the single best invention of Life. It is Life's change agent. It clears out the old to make way for the new" (Jobs, 2005).

Steve Jobs would return to Apple following his surgery and live to see the successful launch the iPhone, iPad, and other new technologies that would define and cement Apple as a leading technology innovator before his death on October 5, 2011.

Stage V: Legacy

As a global icon for changes in technology, Steve Jobs leaves behind a legacy of leadership lessons and key insights. Jobs would state in an interview, "Apple is about people who think 'outside the box,' people who want to use computers to help them create things that make a difference and not just to get a job done" (as cited in Beahm, 2011, p. 23). His goal was to connect people to technology. Many that worked for and with Jobs would claim his persona as a leader may not have been orthodox or conventional, but he was effective. He may not have won many friends along the way, but he was driven. Isaacson (2011a) described Jobs's desire to return to Apple as "his ego needs and personal drive led him to seek fulfillment by creating a legacy that would awe people. A duel legacy, actually: building innovative products and building a lasting company" (p. 306). He succeeded with both: "Jobs would claim that he never invented those things; he discovered them. They were always there, someone just needed to 'connect the dots' to put the parts together into a whole no one else seemed to see" (Alvey, 2011, p. 22). Robert Brunner, a former Apple designer mentioned, "His legacy of making design a strategic tool cannot be underestimated" (as cited in Stone, 2011, p. 38). Fry (2010) described Jobs as a man with a vision, relentlessly obsessed with detail and a magnetic enough to compel others to his own sense of reality.

Stone (2011) wrote:

In 15 years, Jobs had taken a floundering company that once seemed unlikely to grow

past its painful adolescence and turned it into one of the most influential and valuable

companies in the world. He had changed culture, commerce, and the very relationship

that people have with technology. (p. 42)

After Jobs' death, Schmidt (2011), the executive chairman of Google, spoke of Jobs,

"One of the things about Steve is, he was always in the realm of possibility. There was a set of

assumptions that Steve would make that were never crazy. They were just ahead of me" (p. 27).

Also at this time, Preimesberger (2011) wrote in *eWeek*:

Though he had no formal business education or training, Jobs was one of the savviest

people ever to run an American company because he understood what customers wanted.

He was able to take the highly technical task of aggregating digital files of all kinds and

make them accessible in an intuitive, nontechnical way for Apple's customers. (p. 23)

Moritz (2010) quoted a comment from Jobs on his thoughts regarding marketing, "The only

chance we have of communicating is with a feeling" (p. 123). It was a feeling Jobs would leave

as a legacy. Regis McKenna, Jobs' marketing partner since the 1980s, said, "he has turned

modern electronics into objects of desire," (p. 13).

Not everything Jobs created or helped produce was a success. Whether it was the Lisa

personal computer, the Newton handheld pad PC, the eMate PC, the Macintosh television, or the

AppleWorks business software "they were either flawed or way ahead of their time"

(Preimesberger, 2011, p. 23). Jobs was not deterred by his failures; he kept moving forward.

Many technologists and historians will be remember Jobs for what he did create versus what he

did not. Nancy F. Koehn, a historian at the Harvard Business School, said, "Jobs had an

unmatched set of skills that include vision, intuition, creativity, and leadership" (as cited in Helft, 2011, p. 107). Moritz (2010) wrote:

> Jobs now deserves to be mentioned in the same breath as Franklin, Carnegie, Edison Rockefeller, Ford and Disney. Without any doubt he is has had that profound an effect on society. Without any doubt he is the most significant American businessman born after the end of World War II. (p. 13)

Stone's (2011) reference to Jobs is that "People credit him as an inventor akin to Edison, but his real genius was seizing upon existing concepts, simplifying and perfecting them, and then putting them forward at exactly the right movement," (p. 42). Writing in *The New Yorker*, Surowiecki (2011) noted, "What turned Apple into the most valuable company on the planet was that Jobs did more than just create cool new devices. Rather, he presided over the creation of new market ecosystems, with those devices at their heart" (p. 29). Wolverson (2011) noted that Jobs was always thinking beyond gadgets, quoting Arash Amel, "Apple decided early on that devices drive consumption. That mantra evolved into an entire ecosystem reliant on Apple devices" (p. 14). Steve Jobs' protégé Tim Cook now leads the Apple ecosystem.

Tim Cook, as the new CEO of Apple, has the responsibility to continue Jobs's legacy. With this unenviable task of replacing Jobs, he has his work cut out for him. O'Rourke (2011) pointed out:

> During Jobs' 14-year tenure as CEO, Apple's stock has risen more than 9,000%, taking it from a tech start-up on the verge of bankruptcy to a firm that now vies with Exxon Mobil for the title of 'most valuable company in the world. (p. 6)

Tim Cook now is at the helm with Jobs's influence embedded into Apple's DNA left to inspire the next generation of technology leaders tasked to create future products that may define the next era.

Profitable Innovative Growth

In a book about Jobs as an innovator, Gallo (2011) wrote, "Innovation starts with creative ideas that ultimately are translated into inventions, services, processes, and methods" (p. xii). Perhaps the key to innovation and profitability is idea generation and the power to harness it into actionable means for organizations.

One of the components to this investigation was to understand the leadership of Jobs and how his leadership translated to profitable, innovative growth. Jobs created multiple innovation engines that led to new innovative products that resulted in superior financial performance. Over the course of his career with Apple and Pixar, Jobs' led these organizations experienced growth in marketshare, breakthrough new technologies, and created a new standard for revolutionizing several industries.

Although NeXT lacked revenue for its business model, its software would be the reason why Apple would buy it for its next operating system.

Pixar struggled to achieve financial success, not for a lack of engineering talent or creative innovations in computer animation, but rather leadership, to get its proverbial foot in the door with a distribution company like Disney. Jobs invested in Pixar and coached its relationship with Disney for further investment to create *Toy Story* and the growing list of financially successful, Academy Award winning films that followed.

From a results oriented perspective, the fact remains Apple's market capitalization or value as a company grew more under the leadership of Jobs than any other leader in his absence.

When Jobs' returned to Apple in July 1997, the stock was at $14 a share. In 2000, Apple stock

was at $102 a share (Isaacson, 2011a). At the time of his death, Apple's stock, "was selling or

$388 on Oct 10, 2011, after having been in the $10 range in 1997 before Jobs' return,"

(Preimesberger, 2011, p. 26). The stock price indicates a value of an investment, in this case for a

share of a company. The rise in stock value is only one indication of financial growth. Other

indicators of financial growth and profitability are revenue and net income. Helft (2011) noted

in Figure 1, the growth of Apple revenue (sales) and net income, (profit) since Jobs' return in

1997.

In order to sustain new products and services, the research and development (R&D)

investment spending reflects an organization's commitment and efficiency in driving innovation.

Since Jobs's return in 1997 Apple net income and revenue exceeded $60 billion (Heflt, 2011).

Despite a dramatic increase in R&D, a fraction compared to its competitors, Apple's financial

performance came from new innovative produces. Apple's competitor, Microsoft spent eight

times in R&D expeditors to the amount Apple invested (Hartung, 2011). Apple was efficient in

innovation dollars compared to its competitors as a result of innovative products that created

market leadership. Apple's market leadership, with a portfolio of new products, created record

financial performance from 2002 to 2011 (Goldman, 2011).

It is clear from the financial metrics as well as the perception in the global economic

community is that Apple is considered an innovative organization with launches of the iPod,

iPod Nano, the iPhone and the iPad. All of these products reflect a growth of sales from $5.7

billion to greater than $65 billion dollars in eight years. According to Deutschman (2011):

Jobs was the motivating force behind the idea that business and work can be primary

sources of creativity, fulfillment, and meaning in our lives: the beliefs that companies can

foment cultural change: the notion that engineers and executives can think like artists:

and the realization that good design and aesthetics matter in one of the world's most

cutthroat industries. (p. 8)

The research clearly establishes Apple as an innovative company that is profitable and was led

by the dynamic Jobs.

According to a BusinessWeek poll by the Boston Consulting Group, (Nussbaum, Berner,

& Brady, 2005) interviewed 940 senior executives from public corporations across the globe and

asked them to rate the most innovative companies in the world. The results show that Apple was

selected the highest or the most innovative across a variety of industries, not limited to just

technology, with a 24.84% rating. Apple received the highest score. The next highest score was

3M at 11.77% followed by Microsoft at 8.53%. The survery of these 940 executives revealed

Apple received such a high score based on a reputation for delivering great consumer

experiences with outstanding designs that defined business models and technology platforms

Nussbaum et al. (2005).

This section articulated how Jobs, the leader and CEO, was the driving force behind

Apple's innovative, profitable growth. The following section will review the leadership traits of

Jobs as potential indicators for Apple's organizational performance.

Research Question One

The first research question posed by the researcher asked: What are the key

characteristics that define the leadership style of Steve Jobs? In order to answer this question, the

researcher inquired about Jobs via multiple sources including articles, books, blogs, journals,

interview, speeches, third party observations, opinions, and interactions. These resources

revealed a variety of stories and provided insight on the life and leadership of Jobs. After

reviewing the material from numerous sources, the researcher identified a multitude of attributes,

skills, adjectives, and nouns used to describe Jobs. A list of sixty-three attributes (See Table 2)

was consolidated as data points to give a perspective of how Jobs was perceived by others over

the course of his career. These descriptors influenced the decisions, the behavior, and the

leadership of one man's impact on the people, organizations, and the development of technology

at the various organizations he led.

Table 2

Leadership Attributes 1.0

Leadership Characteristics of Steve Jobs						
Various Observers	**Ulrich**	**Young & Simon**	**Kahney**	**Gallo**	**Isaacson**	**Mortiz**
Intelligence	Collaboration	Intelligence	Intelligence	Brand Focused	Intelligence	Aggressive
Arrogant	Community	Arrogant	Callous	Creative	Charismatic	Argumentative
Callous	Driven	Authoritarian	Controlling	Customer Focused	Confident	Callous
Charismatic	Entrepreneurial	Callous	Creative	Passionate	Controlling	Driven
Controlling	Focused	Charismatic	Demanding	Simplicity	Creative	Energetic
Creative	Impactful	Confident	Customer Focused	Strong Presenter	Customer Focused	Optimismtic
Customer Focused	Risk Taker	Controlling	Focused	Visionary	Dictatorial	Ruthless
Driven	Simplicity	Demanding	Detailed		Driven	Tenacity
Focused	Speed	Focused	Fearless		Focused	Visionary
Passionate	Talent Minded	Confident	Fear		Disciplined	
Manipulative	Visionary	Egomania	Ruthless		Energetic	
Micro-manager		Passionate	Risk Taker		Fear	
Simplicity		Intense	Micro-manager		Passionate	
Impatient		Impatient	Forceful		Manipulative	
Strong Presenter		Nonconformist	Simplicity		Simplicity	
Personal Magnetism		Personal Magnetism	Impatient		Impatient	
Perfectionist		Reality Distortion	Strong Presenter		Intense	
Reality Distortion		Selfish	Intimidator		Perfectionist	
Stubborn		Speed	Secretive		Reality Distortion	
Temperamental		Stubborn	Learner		Selfish	
Willful		Tyrannical	Talent Minded		Rude	
Visionary		Willful	Perfectionist		Visionary	
		Visionary	Persistent			
			Prototyper			
			Purpose			
			Visionary			

In an attempt to decode and provide additional structure to the list of sixty-three unique descriptors, the researcher examined how to make the list more manageable. The researcher

investigated managing the list by frequency. The descriptors with the highest frequency of use found in the research were rearranged in order from the most common to least common. If an an adjective, or an attribute, or a descriptor was referenced by more than one author, or source, than it was singled out. The higher the frenquency of specific attributes revealed in the research, the more indicative the attribute was key to understanding Jobs.

In this case the researcher chose eleven traits that appeared four or more times out of the sourced research materials (See Table 3). Understanding the researcher's selection of the criteria could be subjective. The goal was to find a process to showcase the more predominant attributes of Steve Jobs over the course of his career.

Table 3

Leadership Attributes 1.1

	Leadership Characteristics of Steve Jobs						
Frequency	**Various Observers**	**Ulrich**	**Young & Simon**	**Kahney**	**Gallo**	**Isaacson**	**Mortiz**
7	Visionary	Visionary	Visionary	Visionary	Visionary	Visionary	Visionary
5	Focused	Focused	Focused	Focused		Focused	
5	Simplicity	Simplicity		Simplicity	Simplicity	Simplicity	
4	Intelligence		Intelligence	Intelligence		Intelligence	
4	Callous		Callous	Callous			Callous
4	Driven	Driven				Driven	Driven
4	Controlling		Controlling	Controlling		Controlling	
4	Creative			Creative	Creative	Creative	
4	Customer Focused			Customer Focused	Customer Focused	Customer Focused	
4	Passionate		Passionate		Passionate	Passionate	
4	Impatient		Impatient	Impatient		Impatient	

The majority of the literature revealed one of the more prominent leadership traits of Jobs was his ability to be a visionary. All sources referenced this particular strength of Jobs. From the very beginnings of Apple, Jobs presented characteristics of a visionary. Jobs' gave interviewers reference to what he called this "vision thing," (as cited in Beahm, 2011, p. 15). Beahm quotes Jobs saying:

I'm always keeping my eyes open for the next big opportunity, but the way the world is now, it will take enormous resources, both in money and in engineering talent, to make it happen. I don't know what that next big thing might be, but I have a few ideas. (p. 15)

Jobs envisioned future applications of technology and spent a great deal of time focused on the next technology or product to revolutionize the industry.

The next descriptor for Steve Jobs that had the highest level of frequency was Jobs' ability to be focused. Jobs came back to Apple in December, 1996, (Isaacson, 2011a) to help the organization get organized and back on track. He streamlined product lines to focus the organization. He was well known in Apple for saying no to many ideas to maintain focus in the organization (Isaacson, 2011a, Kahney, 2009; Young & Simon, 2005).

The next descriptor that appeared with the same frequency as Jobs' ability to focus was his simplistic nature. This notion of simplicity involves Jobs' ability to treat complex issues and convey them to others in a much simpler way. As an example, as Apple grew and became more dynamic, Jobs would utilize his skills to simplify products and processes for efficiency. His simplistic nature stemmed from his belief in Zen Buddhism (Isaacson, 2011a). Jobs' mantra was to have Apple products be designed around simplicity. Jobs stated, "I love it when you can bring really great design and simple capability to something that doesn't cost much," (Isaacson, 2011a, p. 7). Jobs stated the following in an interview with a reporter for Businessweek, "Simple can be harder than complex: You have to work hard to get your thinking clean to make it simple. But it's worth it in the end because once you get there, you can move mountains" (as cited in Reinhardt, 1995, p. 62).

Another historical figure known for having a simple life is Albert Einstein. Einstein was once quoted as saying, "Everything should be made as simple as possible, but no simpler" (Calaprice, 2005, p. 3). Jobs simple approach to products, business, and lifestyle were part of his leadership approach.

The research discovered the following eight descriptors used to describe Steve Jobs: intelligence, callous, impatient driven, controlling, creative, passionate, and customer focused.

Authors, former peers, and employees recognize the intelligence of Steve Jobs. Jobs did not have a degree or any formal education. His knowledge of computers, marketing, and business, was all hands on. His classroom was experience. Jobs was reviered by many as having an incredible ability to absorb and process great amounts of information. He was a thinker and problem solver from an early age (Isaacson, 2011a). Jobs' short term success could be attributed to luck or hard work, but his sustained financial success of global products and brand awareness requires the intelligence. Jobs knew how to reinvent himself and his products over the coarse of his career.

Another descriptor used to describe Jobs by multiple sources is callous. Jobs' interaction with people was very abrupt and insensitive (Isaacson, 2011a). Jobs willed his desired outcomes with examples of arrogance and a callous disregard for other's feelings. Moritz (2010) described this, "Jobs's critics will say he can be willful, obdurate, irascible, temperamental, and stubborn" (p. 14). In *Rolling Stone* magazine, Goodell (2011) wrote:

> Those who know Jobs best and worked with him most closely-and I have talked to hundreds of them over the years- were always struck by his abrasive personality, his unapologetic brutality. He cried, he stomped his feet. He had a cruel way of driving employees to the breaking point and tossing them aside; few people ever wanted to work with him twice. (p. 38)

Regarded as visionary, yet vicious, (Nadler, 2012) many considered Jobs narcisstic. Nadler described Jobs as a man who may have changed with the world, but only through fear and

intimidation (2012). According to observers, Jobs "continued to park in handicap spaces," (Young & Simon, 2005, p. 260) clearly a sign of one of his enduring personal characteristics.

Similar to his callous nature, the research revealed Jobs as being a very impatient individual. He made decisions quickly, moved, and spoke fast (Isaacson, 2011a). Jobs was known for interrupting employees, suppliers and others because he felt his time was more important. John Scully former CEO of Apple describes Jobs, "direct, abrupt, impatient, and determined. He wanted things done his way, on his terms and his time schedule," (Isaacson, 2011a, p. 153). Jobs had an undeniable sense of urgency as a leader and led his people with this same notion that time, especially his time, was important.

Despite the lack of perceived awareness of his impact on others, Jobs, throughout the literature exhibited a ferocious drive (Isaacson, 2011a). Many authors noted Jobs' "confidence and energy" (Harvey, 2001, p. 258). Jobs displayed tremendous energy maintaining leadership of Pixar and Apple. Jobs was always involved in the day-to-day decisions of the business and was well versed in all facets of Apple's operations (Isaacson, 2011a). Jobs had an amazing work ethic. When he was diagnosised with cancer and had to undergo treatment, Jobs continued to work until he was forced to take a leave of absence by his physicians. In an article from PC Magazine, Apple partner Masayoshi Son, CEO of Softbank, met with Tim Cook only to learn Cook had a phone conversation with Jobs that day before the iPhone 4s launch (Strange, 2011). He was an integral component to executive decisions affecting the business until the day before his death.

One additional descriptor used to define Steve Jobs as referenced by the literature is his tendancey to be very controlling. He would wield his narcissistic personality by getting others to think and act by using intimidation or fear to his advantage. At one point in his early Apple

tenure, "the engineers would make t-shirts that read '90 hours a week and loving it,' Out of a fear of Jobs mixed with an incredibly strong urge to impress him, they exceeded their own expectations," (Isaacson, 2011a, p. 170).   Jobs believed so strongly in a concept, he was able to influence other's thinking either by motivation or manipulation. Biographer Isaacson (2011b) wrote, "Some leaders push innovations by being good at the big picture. Or others do so by mastering the details. Jobs did both relentlessly," (p. 34). Isaacson talked about how Jobs "craved control," (p. 256) how he wanted to "control events," (p. 314) "meetings," (p. 318) and even "control people" (p. 325). Jobs was obsessed about being in control and controlling the world around him.

Multiple date sources reveal another descriptor used to describe Jobs was his passion. Jobs was passionate about perfection, product, design, craftsmanship, music, ideas, and Apple among other things (Isaacson, 2011a). He was passionate to the point of obsessive about his work and making the best products so that he could make a lasting, enduring company. In his commencement speech to Stanford graduates, Jobs' general advice to graduates encouraged them to follow their passions and their instincts (2005). Jobs loved thinking up new ideas. He was passionate about driving technology and walking his path. Jobs had a strong sense of intuition about doing the right thing for the products and the technology.

The research uncovered another leadership attribute used to describe Steve Jobs, being creative. From the beginning of Apple, Jobs learned how to capture the attention of consumers by making a computer look attractive and appealing, aside from functional. From the numerous marketing campaigns and product launches to the minute details of the most obscure parts of the Apple products, Jobs had an opinion on the creative process. Apple's product presentations as

well as performance consumed Jobs. The creative skills of Jobs are best described by the
following:

> To Jobs, design was never for its own sake, but for something greater – the shaping of
> experiences. He thought as marketer but also as a consumer. And, from that vantage
> point, he understood how to simplify design and make devices part of our everyday
> experience, thereby enabling people more enjoyment of their complicated lives. He
> believed in simplicity as a means of engaging people and letting them feel close to
> something as overwhelming as technology. (Dan, 2011, p. 1)

The last attribute the research found to describe Jobs was his ability to be customer
focused. Jobs had empathy for the customer (Isaacson, 2011a). Jobs wanted the consumer to
find a need and value in the products Apple prided itself developing. Mike Markkula trained
Jobs in his marketing philosophy. Markkula describes Apple's approach to the customer as a
need to have, "empathy, an intimate connection with the feelings of the customer," (Isaacson,
2011a, p. 110). Surowiecki (2011) describes Jobs' vision for Apple was to control every part of
the user experience. Surowiecki wrote that Jobs' perfectionism changed the world of computing
in the eighties with the look and feel of the Apple Computer. Jobs wanted the user experience to
be simple, revolutionary and bold. From the packaging to the look and feel, he obsessed over
every detail of the products Apple launched. As a pioneer in the technology field, Jobs was
quoted as saying, "A lot of times, people don't know what they want until you show it to them,"
(as cited in Reinhardt, 1995, p. 62).

The first research question posed by the researcher asked: What are the key
characteristics that define the leadership style of Steve Jobs? This section provided a summary
of eleven perceived descriptors used to describe Jobs. The researcher attempted to present the

data in an honest and unbiased perspective. The many anecdotal stories, descriptions and quotes used to describe Jobs provided insight into his style of leadership. The fact that Jobs was considered to be a visionary, focused, simplistic, intelligence, callous, impatient driven, controlling, creative, passionate and customer focused person is why many viewed him such an interesting leader. The next section will attempt to provide additional information on the leadership style of Jobs.

Research Question Two

The second research question asked by the researcher was the following: Over the course of his career, what leadership model(s) would resemble the predominant leadership attributes of Steve Jobs? When the researcher looked at the attributes of Jobs from the data, it provided a general description of a man; it did not however define a specific leadership model. Because there are so many leadership models out there, the researcher needed to conduct further research on what model or models were effective to drive profitable growth and innovation. The researcher then looked at the attributes of Jobs to understand what leadership style or styles fit the man that changed the face of technology.

When the researcher started to examine leadership styles that could yield profitable, innovative results, the most effective trait revealed having a mastery of change. Without going into effective change models, the researcher wanted to focus on the leadership styles that managed the change process. Although the definition of change will vary by author, the ability to manage it in an organization to drive innovation remains an important quality in a leader. Agbor (2008) writes, "If the leaders' objectives are dynamic, ambitious, and innovative, and if they demonstrate proactive attitudes as well as a capacity to respond to change, this can help

bring innovation, renewal, and success to the organization," (p. 40). Change in a dynamic

environment in some cases, it is called something very different Jung et al. (2003) commented:

> Brown and Eisenhardt (1998) have referred to a structured chaos. They argued that there
>
> is a redefined role of leaders as architects and cultural guardians, who need to go beyond
>
> the traditional managerial responsibilities by carefully monitoring and controlling
>
> organizational reconfiguration processes. As such, there may be a threshold past which
>
> additional empowerment may dilute managers' ability to lead change. (p. 26)

The comment in Jung's reference of a leader as an architect and cultural guardian transcends the

role of a leader to beyond just inspiring others to creating a vision for where to take the

organization. In addition, it speaks to how important it is for the leader to know how their

behavior shapes the culture of an environment.

The leadership models discussed in this paper addresses the change process with unique

perspectives. From one viewpoint, Northouse (2004) stated, "The essence of situational

leadership demands that a leader match his or her style to the competence and commitment of the

subordinates" (p. 87). The leader's style and approach to change differs with each situation.

Another leadership style that contrasts sharply with situational leadership theory is authoritarian

leadership. Cherry (2012) concluded, "Authoritarian leaders, also known as autocratic leaders,

provide clear expectations for what needs to be done, when it should be done, and how it should

be done" (para. 2). This style is often seen in the military, in a command and control

environment where there is little autonomy. This style of leadership:

> places heavy emphasis on task and job requirements and less emphasis on people, except
>
> to the extent that people are tools for getting the job done. Communicating with
>
> subordinates is not emphasized except for the purpose of giving instructions about the

task. This style is results driven, and people are regarded as tools to that end. The leader

in this style is perceived to be controlling, demanding, hard-driving and overpowering.

(Northouse, 2004, p. 69)

In the pendulum of tasks versus relationships, the authoritarian leader weighs more towards

tasks. Being critical of others and more focused on the tasks at hand due to their competitive

nature, the authoritarian leader fails to recognize the needs of the individual.

In comparison to the authoritarian leadership style, the servant leader (Northhouse, 2004)

looks at change from a different angle. As Brewer (2010) states, "Authoritarian leaders make

decisions based off position and title, rather than persuasion. Servant leaders build effective

group consensus in order to affect change," (p. 5). "Servant leadership can manifest positive

change in organizations, contrasting traditional autonomous leadership methods," (p. 7). When

followers recognize leaders place value on individuals, followers are more likely to perform at a

higher level (Braham, 1999).

In addition, Smith et al. (2004) wrote:

A servant leader, on the other hand, encourage followers to learn and would support them

by providing opportunities to both obtain the knowledge and apply it within the company

to obtain a new level of responsibility. In other words, an encouraging servant leader does

not necessarily promote innovations and creativity for the sake of the organization. (p.

84)

In contrast to an authoritarian leader whose power is rested in position, the servant leader, shares

power, putting the needs of others first (Northouse, 2004). Again, Smith et al. (2004) wrote,

"Encouragement and affirmation in servant leadership refer to developing people's potential and

facilitating their personal growth," (p. 84).

The researcher investigated a leadership style that balanced the need to drive organizations through change to achieve innovative results, while inspiring others to achieve beyond the situation. Finding the balance between task and relationship or control versus concensus; the researcher sought out a leadership style that is not complicated and the leader does not have to be a different person based on the situation. Smith et al. (2004) goes on to say, "whereas in transformational leadership, encouragement relates to innovation and creativity. Thus, by encouraging innovation and creativity, a transformational leader would tolerate possible mistakes of the followers for the sake of the benefits from their innovative endeavors," (p. 84). The following research revealed that transformational leadership might be the style that drives change yielding profitable growth and innovation in technology organizations.

Although some scholars who study innovation implementation behavior have included commitment to change as a central component in their theories (Klein & Sorra, 1996), Jung et al. (2003) contrasted their proposal with that of another researcher:

Bass (1985) has argued that transformational leaders often emphasize crisis in order to bring about changes, and we had proposed that when employees perceive a great deal of uncertainty surrounding their organization, they may develop a sense of crisis and become more responsive to top management's push for change and innovation. (p. 24)

The transformational leadership model emerged as an ideal to manage the change process. Jung et al.,(2003) commented, "As expected, the CEO's transformational leadership was positively related to organizational innovation" (p. 22). Senge (1990) stated innovating new products or processes requires a change in the mental model. In addition, being an effective change agent requires the leader to help others understand, modify, and expand the assumptions they make about their circumstances to see new possibilities (Zander & Zander, 2000). When

examining the possibility of the transformational leadership style for comparison, the research

revealed a variety of responses that reinforced each of its four components.

The first component of a transformational leader is idealized leadership. Creating that

vision for change in products and services, in the culture, or in people reflects the leader's

foundation. Drucker (2001) wrote, "An effective leader knows, of course, that there is risk and

the ultimate risk of leadership is to create human energies and human vision" (p. 372). Sarros,

Cooper, and Santora (2011) asserted that:

> a leader with vision creates a culture of change that facilitates the adoption of innovation.
>
> These findings suggest that an examination of leadership vision, as a component of
>
> transformational leadership, needs to be clearly articulated at either an individual or
>
> organizational level of analysis. The capacity of leaders to define a vision for their
>
> organization is one thing, but to have that vision accepted and acted upon as anticipated
>
> both individually and organizationally is quite another proposition. (p. 301)

The next attribute essential to the transformational leadership model is the ability to

inspire, motivate, and promote creativity. One study on empowerment revealed how great

leaders empower and can yield higher creativity. Jung et al. (2003) wrote, "Empowerment

creates a sense of ownership and control over the work to be performed" (p. 6). Jung (2003) and

Sosik (1997) have argued people who are empowered also are more likely to be intrinsically

motivated, thus promoting creative endeavors. Transformational leaders may be the determinant

of organizational creativity by which individuals may produce more creative work, especially

when they perceive more personal control over how to accomplish given tasks.

The next component to the transformational leadership model reflects the need for

intellectual stimulation. Michaelis et al. (2010) state when a leader provides intellectual

stimulation, followers are encouraged to re-examine some of their assumptions, the status quo, and old ways of doing things. They are encouraged to reformulate problems and to identify novel approaches (e.g. Avolio et al., 2002). Jung et al. (2003) cited Dougherty and Hardy (1996), "transformational leader's intellectual stimulation can facilitate unconventional and innovative thinking and working processes that can lead to new knowledge and technology, which is fundamental to firm innovation" (p. 4).

The last component to transformational leadership that reflects effectiveness in innovation is individualized consideration. This leadership styles is that of a coach and mentor. It is the personal connection with an emotional link. The leader's approach and attitude towards change can change the culture. Damanpour (1991) wrote:

> When top executives continually emphasize organizational innovation and display a favorable attitude towards change, it becomes part of the organization's culture and normative expectations that are conducive to creative behaviors and innovative work processes (as cited in Jung et al., 2003, p. 6).

When transformational leaders connect with others, there is a positive correlation with the followers' innovation implementation behavior (Michaelis et al., 2010).

The research revealed transformational leadership style could yield innovative cultures. This study also showed that Jobs was a success at growing profitable, innovative organizations; however, what leadership model(s) would resemble the predominant leadership attributes of Jobs? The researcher examined the eleven attributes and compared them to two of the leadership styles.

The first research question revealed eleven descriptors used to describe Steve Jobs. Separately these descriptors may not have a definitive tie to just one leadership mode, rather

multiple theories and leaders. When these descriptors are grouped together to define one style or even one person, it becomes a greater challenge. Describing a person as a visionary, focused, simplistic, intelligent, callous, impatient, driven, controlling, creative, and passionate and customer focused person is a unique challenge.

The researcher looked at the eleven descriptors and discovered an interesting phenomenon. It appeared that by looking at two leadership styles, the attributes mentioned would partially fit their model. The two models the researcher selected that capture all eleven descriptors of Steve Jobs are the authoritarian and transformational leadership models. The following table (Table 4) depicts a visual of how the eleven descriptors partially fit into both models.

Table 4

Leadership Models

Authoritarian Leadership	Transformational Leadership	Leadership Attributes of Steve Jobs
Demanding	Visionary	Visionary
Autocratic	Intelligence	Intelligence
Dictatorial	Creative	Creative
Driven	Driven	Driven
Controlling	Considerate	Controlling
Critical of others	Coach	Callous
Impatient	Encourages	Impatient
Competitive	Inspiring	Passionate
	Optimistic	Customer Focused
	Role Model	Simplistic
		Focused

The researcher first selected the authoritatian leaderhip model as a means to describe the qualities of someone that was controlling, callous, impatient and driven. Granted there are more words to describe the authoritarian style of leadership such as competitive, demanding, dictatorial, and autocratic to name a few; it was a partial mirroring of attributes to describe those of Steve Jobs. There was no question Jobs feared (Kahey, 2009). He was a leader that was very demanding and controlling (Cherry, 2012, Isaacson, 2011a). Jobs was an intimidator (Kahey, 2009) and used his position of power as a means to push his people to do more. He had more

empathy for the customer (Isaacson) than his employees. He was impatient because he wanted to change the world now. Jobs did not exhibut a high emotional quotient and did not make connections with his employees. In fact he was not attentive to the needs and motivation (Northouse, 2004) as a leader. Jobs' priority was the creation of great products.

The remaining descriptors from the research reflect another insight towards the leadership of style of Steve Jobs. Four attributes from the research reflect Jobs as a transformational leader. First, Jobs was a visionary. Multiple sources referenced Jobs and showed reverence towards his ability to look to future technologies. Jobs could anticipate changes in the market and in technology, a key component to transformational leaders. Because Jobs was such a great visionary, he could see relationships, and was sharp (Isaascon, 2011a), he was not educated with formal degrees but was very intelligent and creative. Jobs could see patterns where no one else could see. He pushed people to not settle, to continue to ask questions and probe new boundaries. Although Jobs was an intimidator and scared employees, (Isaacson, 2011a) he was smart enough to create conversations when needed and could onnect with people on his terms. Jobs was not considerate or a coach, rather a manipulator. Moritz (2010) quoted Elmer Baum, a former Apple engineer as saying, "Jobs has a silver tongue that could talk anyone into anything" (p. 159). The attributes associated with Jobs may not all match with a transformational leader's ability to (Northouse, 2004) "transcend their own self-interests for the sake of others," (p. 182) but Jobs was quick enough to lead organizational change, and fast enough to be a competitive advange (Avolio & Bass, 2002) as a leader in his own way.

The fact that not all of the descriptors uncovered in the research matched both the authoritarian and the transformational leadership models are indicative the leadership style of Jobs was unique. Components of the authoritarian model could perhaps describe an early Jobs

very well. He was very brash and controlling. Although those attributes remained, as he matured, the ability to make connections and see where the organization needed to go from a strategic perspective may have come with maturity and experience. One descriptor used in both models reflects the drive and energy of a leader set to change the world. The last three descriptors, customer focus, simplicity, and passion are three descriptors the research showed to be very positive and influential to the success of Jobs. Jobs obsessed over the customer, from the package, to the product to the experience (Isaacson, 2011a). Jobs tried to live a simple life and he wanted technology to be simple so everyone could use it. Steve Jobs was passionate. He was passionate about wanting to change the world and how people used technology to do it.

Summary

Over the course of his career, Jobs made a profound impact on the organizations he led. As the CEO, Jobs led many organizations to produce innovative products that yielded profitable growth; however he was not always successful. Jobs was not perfect, nor did he achieve hierculian changes in technology and culture without personal sacrifices and professional turmoil. As Erve (2004) points out, Jobs was demanding both toward himself and employees; his deadlines often seem impossible to meet, yet they were constantly moving, moving towards improvement in all spheres of his work. The descriptors uncovered in the research reflect multiple facets of a successful person who led change in his own way. Jobs made ideas happen. Whether Jobs pushed as an authoritarian leader or pulled as a transformational leader, he followed he own style. No one leadership styles could be used to describe one man's ability to to make a dent in the universe.

This chapter provided an analysis of Steve Jobs' leadership from a variety of published sources. The five stages of his professional career, which ranged from his early beginnings with

Apple to the growth challenges of Apple to his departure and eventual return to the company he cofounded. The last phase of his leadership style was his legacy. The researcher reviewed the leadership impact Jobs had on the organizations he led in this chapter.

This researcher also addressed the two research questions in this chapter. The first research question inquired about the leadership attributes of Steve Jobs. The research generated a list of sixty three attributes with a consolidated list of eleven. The second research question presented an inquiry towards the type of leadership model reflected that of Jobs. The researcher presented several leadership models and exposed two models that closely resembled the attributes of Jobs, the authoritarian and the transformational leadership models. After reviewing the attributes of both models in comparison to those discovered with Jobs, the research concluded that Steve Jobs was neither one nor the other. The research concluded that despite the patterns of behavior over the years, Jobs' leadership style was uniquely his own.

The next chapter provides a conclusion, summary, implications, and future recommendations for the study.

Chapter V: Conclusion and Recommendations

Fishman (2005) wrote, "As American factories of all kinds morph into high-tech shops, the workers who are left to manage them…must have the core knowledge necessary to adapt to new technology that enters their workplace" (p. 280). New products, technologies, new processes, new leaders, will all impact our global competitiveness. Organizations that have the proper leadership to manage this change and find ways to be more innovative will be the successful ones. This study set out to look at those leadership attributes for innovation and present a review of one man's leadership profile as an example for others to learn.

This research required the researcher to step back and get a different perspective to understand what kind of leadership current CEOs are looking for and establish another perspective from that of leadership theory of Steve Jobs.

In 2011, the Right Management Group, a global consulting company partnered with the Challey Group conducted a project to survey over 1,400 global CEO's and human resource professionals, from 707 organizations across the globe to learn more about companies' leadership development practices and gain insight on traits global leaders need in order to be successful. The following reflects the responses to the global survey with thirteen competences defined by a weighted percentage of importance:

1. Creating a strategic vision, 91.7%,

2. Inspiring others and maintaining leadership responsibility, 62.3%

3. Developing an accurate and comprehensive overview of the business, 56.9%

4. Decision making, 54.5%

5. Selecting and developing successors and key reports, 40.4%

6. Identifying and focusing on critical priorities, 34.4%

7. Politically astute, 31.9%

8. Initiative to produce appropriate change, 29.9%

9. Objective self-assessment of own limitations, 19.6%

10. Collaborative, 18.5%

11. Technical and business competences/expertise, 18.1%

12. Timely/effective execution, 17.0%

13. Directing, delegating and establishing monitoring systems, 13.4%

The role of CEO required all thirteen competences. The survey involved multiple industries, not solely focused on technology organizations.

Out of the thirteen competencies referenced, the survey identified four that were considered by the 1400 CEOs and human resources professionals as the most critical for success. The top four leadership competence or prerequisites for success include the following:

1. Creating a strategic vision, 91.7%

2. Inspire others and maintain leadership responsibility, 62.3%

3. Develop an accurate and comprehensive overview of the business, 56.9%

4. Possess strong decision making skills, 54.5%

These four attributes were similar to the leadership attributes identified at the beginning of the study to those of a transformational leader with the notions of being a visionary, intellectually stimulating and inspiring others. The one component missing as a competence from the Right Management Group survey is being a coach for individual consideration. Instead, the fourth highest rating competence was making decisions, a skill Steve Jobs executed well.

The research from leadership theory, comptemporary thought leaders, current CEOs, and the leadership profile of Steve Jobs; the researcher presents a potential model that incorporates

the collective data from this study. The crafted his own leaderhip model based on the research from this dissertation as well as the work from Robert Katz. The researcher named it the iLeadership Model as seen in Figure 1. Katz's (1955) work published in the Harvard Business Journal on three elements of an effective administrator presents three components of leadership. In 1955, a leader was also known as an administrator in Katz's terminology. He postulated that, "successful administration appears to rest on three basic skills, which we will call technical, human, and conceptual" (p. 34). These three components are part of the foundation for the researcher's leadership model. They are categorized as the ability to be a visionary as a conceptual skill, the interpersonal or emotional quotient element as a human skill and technical and business knowledge or intellectual quotient as the technical skill required to be leader. The researcher realized one skill that Jobs had and executed well was his decision making ability, or the fourth element of the model, and also is represented in the global CEO survey.
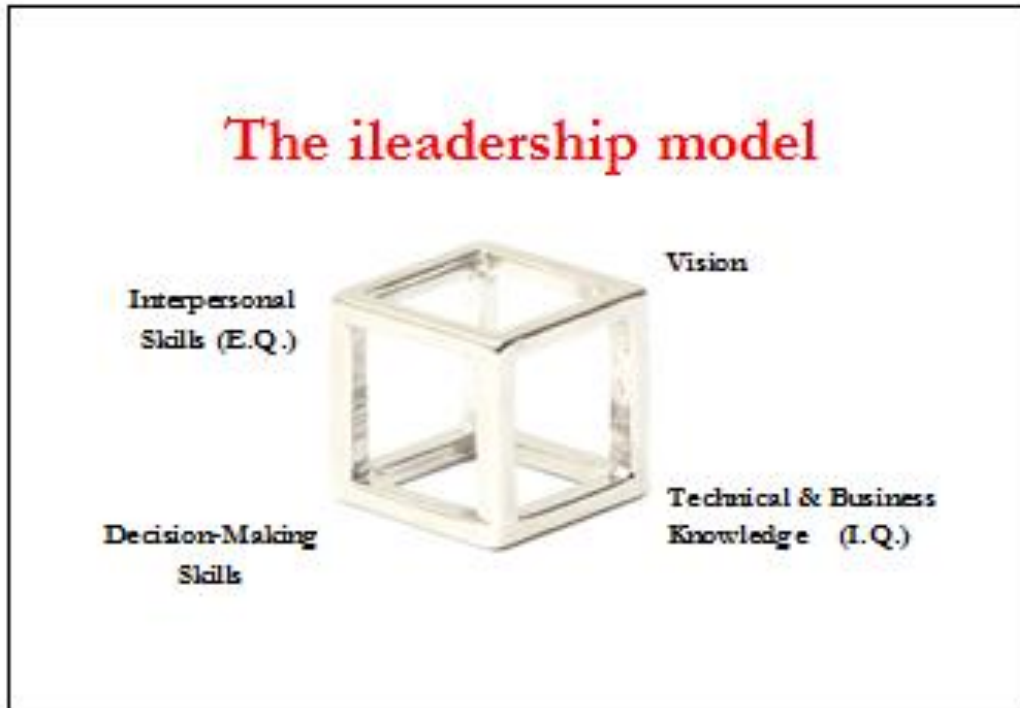
Figure 1. The ileadership model

The four skills set out by the researcher are considered general and may not be specific to a technology organization or that of Jobs. These skill sets do not guarantee a leader will be able to drive profitable growth and innovation. These attributes provide insight from years of research that reflect the combination of theory, contemporary thought leaders, practicians and current CEOs, as effective skills for modern leaders.

Summary of Research Study

The purpose of this case study was to review and decode archival scholarly and contemporary literature and uncover key elements of effective leadership to drive profitable, innovative growth. The study provided insight towards the professional life of Steve Jobs; a man considered to be one of the world's most revolutionary technology leaders. Jobs was not considered to be a perfect leader; however his accomplishments and his impact on the world of

technology is the reason the researcher chose this individual for the study. Many current technology leaders consider Jobs to be one of the greatest technology executives.

Collins (2001) described his highest rating for leader as a, "Level 5' leader, referring to the highest level on a hierarchy of an executive' capabilities" (p. 138). This level of leadership is the duality of humility and will, where the ego is suppressed. The level below, or the level 4 leader, is an effective leader able to, "catalyze commitment to and vigorous pursuit of a clear and compelling vision; stimulates the group to high performance standards" (p. 140). The goal of this study was to provide an understanding of a leader that may not have been a, "Level 5" but a memorable individual with leadership attributes that were unique and died a global icon of technology innovation.

The leadership attributes of Steve Jobs discovered in this research provided one perspective of many that shaped his own leadership style. The various descriptors, the stories, and comparing leadership theories uncovered provided insight into Jobs' thought process as a leader. Isaacs (1999) stated, "How we think does affect how we talk. And how we talk together definitely determines our effectiveness" (p. 3). The study continued with an examination of leadership styles and created a format for the researcher to present a new leadership model. As Katz (1955) states:

> This approach is based not on what good executives are (their innate traits and characteristics), but rather on what they do (the kinds of skills which they exhibit in carrying out their jobs effectively). As used here, a skill implies an ability which can be developed, not necessarily inborn, and which is manifested in performance, not merely in potential. So the principal criterion of skillfulness must be effective action under varying conditions. (p. 33-34)

To Katz's point, though this study focused on skills, descriptors, or attributes that influence a leadership style of an individual; the researcher looked to present a path for the reader to understand the action potential of the individual. Based on the study, there were no defined skills or leadership styles to mirror the results of Jobss.   There were no special secrets to success, but rather a presentation of ideas to encourage and propose the next question of how to develop our leaders to try to be as effective in growing shareholder wealth through innovation.

Summary of Procedures

This research study reviewed many sources of data to provide an exhaustive review of literature from numerous books, articles, journals, case studies, memorials, stories and anecdotes regarding the life of Steve Jobs. Following the death of Jobs, additional papers, articles and books were published. From the various author's perspectives, recollections, first-hand accounts, and opinions, a variety of different vantage points described Steve Jobs.

From a leadership perspective, the researcher attempted to provide a diverse, cross section of leadership opinions, thoughts and theories to give the reader a general sense of what defines a leader, a perspective on several theories, and contemporary research to provide a foundation of understanding.

Following an overview of leadership, the researcher provided a professional chronology of Steve Jobs and provided context to some of his leadership challenges. By reviewing the many circumstances, challenges, and professional life events that defined one man's leadership approach, the researcher collected a list of leadership descriptors from the research to compare to leadership theory. Once the researcher identified leadership theories that could be cross referenced with the attributes of Jobs from the study for discussion, the researcher examined

current survey data to learn what CEOs are looking for in their leaders. The research concluded with a presentation of an alternative leadership model for further research and study.

Key Findings

Effective leadership eludes many people and organizations (Goleman, 1998). It is a general statement that leadership comes in many shapes and sizes. The research from this study revealed that profitable innovation that drives growth could come from unexpected means. One approach consisted of focusing on the leadership descriptors of from Steve Jobs; alone, if replicated, would not necessarily produce similar results. As the research evolved, the attributes grew in quantity and not all of them were flattering towards him. Several of the examples and references of interaction with others revealed personal attributes the researcher would not consider leadership worthy, but were effective for Jobs.

In addition, the research also revealed that although the researcher focused on two main leadership styles for comparison, authoritarian and transformational, other leadership styles could have compared differently based on another set of attributes extracted from the research.

Lastly, the leadership skills and attributes described in this study, as the iLeadership Model do not respresent a definitive recipe for guaranteed replicated success, but rather offer a new perspective on leadership.

Research Question One

The first research question asked, based on the historical review of literature, and from primary and secondary sources, what are the key traits that define the leadership style of Steve Jobs? The study revealed a comprehensive set of sixty descriptors, but the key leadership traits that defined his leadership style were, in no specific order, the following: a visionary, focused,

simplistic, intelligence, callous, impatient driven, controlling, creative, passionate, and customer focused individual. All of these descriptors can describe the leadership profile of Steve Jobs.

Research Question Two

The second research question asked, over the course of his career, what leadership model(s) would resemble the predominant leadership attributes of Steve Jobs? The research revealed multiple data points from the leadership lessons and attributes from Jobs. The study reviewed several leadership styles to uncover attributes that would match those of Jobs and examed what styles werer previously studied and linked to other technology innovation studies. Additional data points from case studies and literature from both the authoritarian and the transformational leadership models appeared to resemble facets Jobs' leadership. Some descriptors of Jobs fit both styles, and the researcher ended up not defining one particular model that was uniquely attributable to Jobs.

Implications

There are numerous implications for researchers and innovators, as well as leaders based on this inquiry. First, this study presents a foundation for further inquiry into the leadership of others in the technology landscape. Apple, Pixar, and NeXT were unique organizations that created revolutionary technology that changed the world. If other organizations are as focused and determined as a culture, these leadership insights may help other leaders or aspiring leaders provide a roadmap for how to lead in a technology organization. It may also provide insight on what not to do in leading people through change initiatives. The presentation of the iLeadership Model provided another perspective towards training and development programs for organizations.

Based on the research, an assessment of the specific leadership attributes identified could be produced to define those individuals who may be pre-disposed to these attributes. Finding more ways for our leaders to hone in on their strengths, and find new ways for them to relate to people, inspire them, and be aware of others' feelings or "blind spots" (Goleman, 1998, p. 65) will increase our leaders' effectiveness and create a new way of thinking about leadership in technology organizations and perhaps create an impact on profitable growth and innovation.

Significance

The significance of this study on the leadership of Steve Job may have an educational impact in the field of leadership. From a theoretical perspective, this study can serve as a springboard for future research on other technology leaders. It may also contribute to the body of knowledge related to innovation and the creation of organizations that produce technology. From the stories, to the decisions, to the observations, it is clear that Steve Jobs created an impact on a global scale: either positive or negative. The thought processes that were uncovered could yield future case studies for others to learn from. This study also reinforces the importance of leadership theory in the scope of technology organizations.

The methodological significance of this study of Steve Jobs revealed limited data. The published information was the source of the research. Because no human interaction was received, the emotions, the overall feelings of the decisions and the impact of those decisions are unknown to the researcher. In addition, because the subject passed away, further researchers will not have the opportunity to inquire more about Steve Jobs, the meaning behind his actions and statement or his feelings regarding leadership. This archival study was more difficult for the researcher because the subject passed away. The researcher was not able to connect with the subject personally.

Both leaders and organizations may be able to learn from the leadership challenges and thought processes of this study to examine current practices or training programs. Organizations may benefit from this study as they look to build their leadership bench strength and evaluate if their model for an ideal leader will provide the desired profitable growth and innovation. The set of attributes presented may yield a new perspective in the screening or selection of future leaders in organizations. In addition, current CEOs may utilize the data from this study and examine how they would respond to the leadership challenges that Steve Jobs faced or ask themselves, (Kouzes & Posner, 2002) "If you want to be followed, then you have to look within in order to improve and move on. You have to continuously ask yourself, how valuable am I" (p. 61)?

Conclusions

As Covey (1989) stated, "Our character, basically, is a composite of our habits" (p. 46). Covey continued with the definition of a habit being the "the intersection of knowledge, skill, and desire" (p. 47). The habits we form shape our behaviors and our decisions. It became clearer over the course of this inquiry that the growing numbers of opinions on leadership will only increase and the foundation of the values, beliefs, and fundamental principles of human interactions remain constant.

The developed list of leadership descriptors from Steve Jobs is a mix of both positive and negative attributes linked to one leader. Because this study is limited to published sources, would the results be different if the researcher was able to interview his direct reports, close friends, or business adversaries; would the list change?

With respect to the leadership attributes tied to a proposed iLeadership Model, the list of skills set as an ideal is open to interpretation and subjectivity.   This qualitative, non-experimental study aspired to provide a unique perspective on the leadership of one man through

descriptive analysis and attempted to present a model for organizations to build from in creating their future CEOs.

It is unfortunate that Steve Jobs passed away. Goodell (2011) said, "Jobs may be remembered as the man who brought the human touch to our digital devices. But perhaps his greatest–and hardest–won accomplishment was bringing the human touch to Steve Jobs" (p. 38).

Recommendations for Future Research

This study of Steve Jobs created a new prospective on leadership and provided a vision for an alternative leadership model. Although the research tried to reduce the bias from various authors and viewpoints; there is no debate that Steve Jobs left an imprint on technology.

This study centered on a very public and visible figure that was the face behind so many products. Many of these products transformed our use and interaction with technology. The researcher recommends the following recommendations for future research:

1. Conduct a survey of those individuals that worked for Apple, NeXT or Pixar and get their thoughts, ideas, and impressions on the leadership of Steve Jobs.

2. Conduct a survey on current Apple employees to discover how has the culture changed since the CEO leadership shifted from Steve Jobs to Tim Cook?

3. Another researcher could examine the impact on leadership from the technologies created from Apple?

4. Discover if Apple's current leadership developmet curriculum mirrors the leadership of Steve Jobs.

The researcher is curious to know, "One more thing…"

<div align="center">

Steven Paul Jobs

February 24, 1955 – October 5, 2011

</div>

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APPENDIX A

List of EDOL Courses

EDOL 700	Leadership Theory and Practice Farzin Madjidi, Ed.D.	
EDOL 714	Organizational Behavior, Theory & Design Kent Rhodes, Ed.D.	
EDOL 724	Ethical Leadership & Social Justice John Chandler, Ph.D.	
EDOL 729	Information Literacy & Scholarship Kay Davis, Ed.D.	
EDOL 730A	Research Methods & Evaluation Dave Walsh, Psy.D.	
EDOL 730B	Qualitative Research & Analysis Kay Davis, Ed.D.	
EDOL 734A	Data Analysis & Interpretation (Descriptive) Farzin Madjidi, Ed.D.	
EDOL 734B	Data Analysis & Interpretation (Inferential) Farzin Madjidi, Ed.D.	
EDOL 740	Personal Leadership Vance Caesar, Ph.D.	
EDOL 753A	Management Theory and Practice Gary Hegenbart, Ed.D. Management and Policy Development Todd Bouldin, Esq.	
EDOL 753B	National Policy Experience John F. "Jack" McManus, Ph.D.	
EDOL 754B	International Policy Experience June Schmieder-Ramirez, Ph.D. Ron Stephens, Ph.D.	
EDOL 756	Leading Educational Programs Mark Allen, Ph.D.	

EDOL 757   Entrepreneurship
                           Vance Caesar, Ph.D.

EDOL 758   Consultancy Project
                           Ron Stephens, Ph.D.

EDOL 759   Law & Dispute Resolution
                           June Schmieder-Ramirez, Ph.D.
                           John Tobin, J.D.

EDOL 762   Transforming Organizations in Global Communities
                           Doug Leigh, Ph.D.

APPENDIX B

Apple's Products Since 1997

Since Steve's return to Apple in 1997

iMac- internet May 1998, iMac G4 2002, iMac G5 2005

iBook July, 1999

PowerBook G4 released 2000

iPod- Oct, 2001, iTunes, digital hub

iMac G4 2002

iTunes- Hub 2003Music store

iPod mini 2005

MacProBook and Apple TV 2006, 2nd Generation Apple TV 2010

Cancer- 2004 cancerous tumor on his pancreas

2008 leave of absence- rapid weight loss, guant, left on a 6 month leave of absence

iPhone 2007, 3G 2008, 3GS 2009, 4 2010, 4S 2011

Macbook Air, 2008

 iPad, 2010, iPad2 2011

iCloud 2010

APPENDIX C

Institutional Review Board Exemption Notice

PEPPERDINE UNIVERSITY

Graduate & Professional Schools Institutional Review Board

April 10, 2012

Protocol #: EN0412D07
Project Title: *iLeadership: The Leadership Style of Steve Jobs*

Dear Mr. Valentine,

Thank you for submitting the Non-Human Subjects Verification Form for your project entitled, *iLeadership: The Leadership Style of Steve Jobs*. Per Institutional Review Board (IRB) guidelines, all proposed research that involves either direct or indirect contact with human subjects requires an application be submitted to the Graduate and Professional Schools IRB (GPS-IRB). Research that requires IRB review must meet the definition of human subjects' research. The code of federal regulations provides the following definitions:

- For purposes of the IRB, research is defined as a systematic investigation designed to develop or contribute to generalizable knowledge.

- Human subject means a living individual about whom an investigator (whether professional or student) conducting research obtains

   (1) Data through intervention or interaction with the individual, or
   (2) Identifiable private information.

Because your research does not involve the participation of human subjects and you are not using/collecting any data that has been obtained from individual participants, your research is not subject to IRB review and approval.

Sincerely,

Jean Kang, CIP
Manager, GPS IRB & Dissertation Support
Pepperdine University
Graduate School of Education & Psychology
6100 Center Dr. 5th Floor
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cc: Dr. Lee Kats, Associate Provost for Research & Assistant Dean of Research, Seaver College
         Ms. Alexandra Roosa, Human Protections Administrator
         Dr. Yuying Tsong, Chair, Graduate and Professional Schools IRB
         Ms. Jean Kang, Manager, Graduate and Professional Schools IRB
         Dr. June Schmieder-Ramirez
         Ms. Christie Dailo