

**AGENCY EXPERIENCE:  
A CASE STUDY OF LEADERSHIP DEVELOPMENT WITHIN A  
HIGH-PERFORMING PUBLIC RELATIONS AGENCY**

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## **ABSTRACT**

### **Agency Experience: A Case Study of Leadership Development Within a High-Performing Public Relations Agency**

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(Under the direction of Lois Boynton, Ph.D.)

This dissertation examines “agency experience” as a means of leadership development for public relations professionals. This qualitative study draws upon field research conducted within one of America’s largest public relations agencies. Observations were made for three consecutive weeks inside the agency’s headquarters. In addition, one-on-one interviews were conducted with 28 employees of the agency, ranging from assistant account executives to senior vice presidents.

Findings reveal that agency professionals, particularly those in the first five years of their career, gain leadership competencies by handling a heavy, complex, and often diverse workload, and from working in a team-oriented, inclusive environment that expects self-motivation. As a whole, the agency setting provides an environment where emerging leaders feel safe speaking their minds. Formal leaders set the tone by coaching others, contributing to strategic development and project direction, and clarifying situations that inevitably develop during the course of implementation. Some of these findings are consistent with related studies in other industries regarding work experience and psychological safety; other findings seem unique to the public relations business.

This case study sheds light on what “agency experience” means for leadership development in one agency. Insights provide baseline knowledge upon which further research can be conducted regarding other agencies and other types of organizations.

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I would be remiss not to mention C. John Somerville, Ph.D. His book, *How the News Makes Us Dumb: The Death of Wisdom in an Information Society*, prompted me to begin graduate studies. My goal as a professor and researcher is to foster public relations professionals who help enlighten, and not dumb down, society.

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to me why they were called doctors since they did not practice medicine, but I knew there was something special about their style of leadership. I learned so much from their example.

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This project is dedicated to my father, gone now more than two decades. His advice from years ago helped immensely on this project: “You have to plan the work, and then work the plan.” Dad, you were a good leader and a great role model. Thank you for showing me the way.

**“If your actions inspire others to dream more, learn more,  
do more, and become more, you are a leader.”**

John Quincy Adams (1767-1848)

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## **CHAPTER 1: INTRODUCTION**

Having worked within a public relations agency – in other words, having gained “agency experience” – has long been a marketable asset for public relations practitioners looking to advance their careers. Indeed, corporations, nonprofits, and other types of organizations continue to place high demand on public relations professionals who possess agency experience. A review of the online job bank for Public Relations Society of America (2010), the world’s largest association of public relations professionals, confirms that postings for leadership roles often require, or state a preference for, candidates with agency experience. But what exactly is agency experience, particularly in this age of globalization and technology? And how does the experience of working within a public relations agency in the new millennium foster leadership development?

The purpose of this dissertation is to explicate the concept “agency experience” from a twenty-first century perspective, and thereby enrich scholarly and professional understanding of leadership development within the public relations agency environment. The project builds upon existing research in public relations, organizational behavior, and leadership development, and takes into consideration major influences on the public relations industry since 2000, including the economic aftermath of the 9/11 terrorist attacks and the 2008 financial crisis, as well as the meteoric rise and widespread popularity of social media. Triangulated methods – longitudinal financial analysis, field research, and critical interpretation – are used to analyze work experience within one of America’s highest-performing, independently owned public relations

agencies. A primary outcome of the study is an “agency experience” model of leadership development with valuable insights for public relations scholars, public relations leaders, and anyone pursuing a career in the field of public relations.

### **Significance of the Study**

Scholars have long defined public relations as a strategic management function – that is, a discipline requiring professionals to think and act like leaders (Dozier & Broom, 2006). Existing research suggests, however, that years of professional experience handling such responsibilities are necessary to improve a public relations practitioner’s chances of moving into a formal leadership role (O’Neill, 2002). Based upon the content of job postings for public relations leadership roles, experience within a public relations agency is seen as catalyzing that leadership development process. For example, a vice-president of corporate communications role for a West Coast software firm, posted July 29, 2010, and a public relations manager role for a global airline, posted August 3, 2010, both require candidates to have at least eight years’ experience in an agency setting (Public Relations Society of America, 2010).

Little is known, however, about the day-to-day workplace experience of public relations agency professionals. In fact, only a few known studies have examined the experience of professionals working within public relations agencies. These studies focus on culturally diverse employees, and the management of intellectual capital (Cupid, 2009; Daymon & Hodges, 2009; Soter O’Neil, 2004; Wallace, 2009).

No known research has broadly explicated what “agency experience” means with regard to the daily, interactive work experiences of public relations agency professionals and the leadership development they gain from such experience. This is an important question to answer because postings for public relations leadership roles within organizations frequently state a

requirement of, or at least preference for, “agency experience” (Public Relations Society of America, 2010). In addition, many organizations integrate public relations roles and related functions in a way that resembles an in-house agency, despite the fact that little is known about the organizational design necessary to effectively achieve such a goal or the leadership development such an environment might foster (Grunig & Dozier, 2002).

By understanding the experience of those who work in public relations agencies, we can better understand an environment that has been traditionally rich for producing public relations leaders. Insights can be gleaned from individual, as well as institutional, perspectives. Findings should help agencies, corporations, and other organizations refine and strengthen their public relations functions, and also help improve organizational learning and leadership development for public relations practitioners.

Studying work experience is crucial across many industries, including public relations. Prior research indicates that on-the-job work experiences – not formalized training or other programs – are the primary source of professional development and learning (Morrison & Hock, 1986). More than a decade ago, Tesluk & Jacobs (1998) drew attention to the importance of studying both the qualitative and quantitative aspects of work experience, which can vary and interact over time. For example, a person may be assigned more tasks over time, a quantitative aspect, with each task being successively more complex, a qualitative aspect; combined, these two aspects create task density, or frequent tasks with increasing degrees of complexity. Possible outcomes from these types of work experiences include changes in knowledge, skills, attitudes, and motivation, ultimately affecting group and individual performance.

To more fully understand behavioral outcomes, both individual analysis and informal organizational perspective must be kept in view (Ibarra, 1993). This study yields important

findings by examining the attributes and actions of professionals within a public relations agency setting, not just from the perspective of the individuals' formal roles, but also from the informal network of power and influence, as well. This approach adds further significance to the study, for it is the first known study of public relations practice in which leadership is viewed as both a set of competencies displayed by individuals and a collaborative process exhibited through a myriad of formal and informal interactions.

### **Definition of Terms**

In order to explicate what agency experience means in the new millennium, a few key terms must be defined, specifically public relations agency, high-performing agency, and leadership development.

#### ***Public Relations Agency***

For this dissertation, the word agency is used synonymously with firm. The words are often used interchangeably within the public relations industry to describe a business that provides public relations counsel and services to clients on a fee or contract basis (Croft, 2006; Hinrichsen, 2000). Firm is a more limiting term; only 100 businesses belong to the Council of Public Relations Firms. However, according to the United States Department of Labor, as many as 7,000 businesses self-identify as either public relations agencies or firms (Council of Public Relations Firms, n.d.; U.S. Bureau of Labor Statistics, n.d.).

This dissertation focuses on independently owned public relations agencies, excluding by necessity those agencies that are part of publicly held conglomerates. As a rule, "PR and communications agencies in holding companies decline to submit exact revenues and headcounts" (Barrett, 2010, p. 30) to trade publications. Due to their policies restricting public



release of operational data, well-known yet publicly held agencies such as Omnicom, Interpublic, and WPP are excluded from consideration for this dissertation.

It is important to note that, in light of the rise of social media and media convergence, the concept of an agency exclusively focused on traditional public relations seems to be in transition. Agencies that appear in the annual public relations industry rankings now often provide, to varying degrees, a suite of integrated services not traditionally defined as public relations practice, including digital media and marketing communications (*PR Week*, 2010). This study keeps an eye to convergence-related implications as the concept of what a public relations agency continues to evolve.

Independently owned public relations agencies in the United States are, as a whole, quite similar in size and revenue. Among the 150 independently owned public relations agencies in America with the highest annual revenue, nearly 90% have fewer than 100 employees. Annual revenue per employee within these agencies, regardless of staff size, averages \$156,289, rarely exceeding \$225,000 (*PR Week*, 2006-2010).

### ***High-Performing Agency***

For this study, a high-performing public relations agency is defined as one that exemplifies three measurable characteristics, namely efficiency, or revenue per employee; growth, or percentage revenue increase over a five-year period; and longevity, or continuous operation over that same five-year period (see Table 1.1).

**Table 1.1 Characteristics of High-performing Public Relations Agencies**

Characteristic	Definition
Efficiency	Revenue per employee
Growth	Percentage revenue increase, 2005-2009
Longevity	Continuous operation, 2005-2009

Since the late 1800s, the U.S. government has studied and tracked productivity, or output per man-hour, across industries as a measure of economic performance (Kendrick & Grossman, 1980). Productivity, and in turn profitability, is dependent upon employees and their output. However, the output in public relations is neither consistent nor easily measured. A public relations agency, for example, may work diligently and proactively to help a client avoid a crisis or keep a looming issue out of the news. In this case, a lack of news media coverage, rather than a wealth of generated news coverage, would be the appropriate measure of success. The agency may not have created much, if any, tangible output, such as news releases. How, then, can productivity be measured in such an abstract field?

Efficiency, or revenue per employee, is a measure that puts all independently owned agencies on the same playing field, at least economically speaking. Agencies need not be large to achieve efficiencies or grow; small agencies can achieve vitality by capitalizing on market conditions and tapping opportunities left untouched by large firms. The size of businesses being compared has no significant impact on the viability of using efficiency measures as a means of financial analysis (Hennart, 1994; Penrose, 1959).

Growth, or percentage of revenue increase over a five-year period, is equally justified as a financial analysis metric for independently owned public relations agencies. Applying the economic theory of the growth of the firm, the strength of a business can be determined by the typical measure of current revenue (i.e., output and sales), as well as growth in revenue over time, wherein potential short-term profits are reinvested for the long-term good of the business (Penrose, 1959). The financial analysis method used in this dissertation focuses on growth in revenue over the five-year period from 2005 to 2009.

Longevity is a third key metric developed to identify high-performing agencies, in which agency performance and growth are viewed longitudinally. Longevity must be considered to validate an agency's viability over time. Thus, even if an independently owned agency had experienced year-over-year revenue growth with high levels of efficiency, such agencies were discarded from analysis unless they had been in operation since at least 2005, prior to the financial crisis that began in 2008.

### ***Leadership Development***

A well-recognized definition of leadership, drawn from decades of leadership research, is “a process whereby an individual influences a group of individuals to achieve a common goal” (Northouse, 2010, p. 3). For this study, leadership will be more narrowly defined as an adaptive behavior involving leaders and followers, and the circumstances within which they work (Bryant, 2010). This approach builds upon arguments first advanced by Stogdill (1948), who re-conceptualized leadership as an interactive process. The adaptive perspective of leadership is holistic, taking into consideration followers, situational factors, and external influences, and understanding the role of work experience in helping foster self-awareness and mindful leadership (Bryant, 2010).

Leadership development is more difficult to define (Avolio, 2010). A review of best practices in defining leadership development highlights variables such as job duties, project assignments, mentors, networks, coaching, and 360-degree feedback (Groves, 2007). McCall (2010) posits that leadership “development is formed by powerful experiences” (p. 680) which may happen at specific moments or cumulatively over the course of a person's career. Another study suggests that leader development stems as much from interactions of followers, or group members, as from the behavior of the leader or the interaction between leader and followers

(Avolio et al., 2009). Moreover, no known research has explored leadership development specifically within public relations in the United States.

Given the lack of a unified scholarly definition, this dissertation will view leadership development, and specifically leadership development within public relations agencies, as work-related experiences that help expand a person's self-awareness and skills relative to influencing group behavior and achieving team goals. These work experiences may involve one's formal leader, colleagues, or both.

**Table 1.2 Definitions of Leadership and Leadership Development for this Study**

<b>Concept</b>	<b>Definition(s)</b>
Leadership	<ul style="list-style-type: none"> <li>• A process whereby an individual influences a group of individuals to achieve a common goal (Northouse, 2010)</li> <li>• An adaptive behavior involving leaders and followers, and the circumstances within which they work (Bryant, 2010)</li> </ul>
Leadership Development	<ul style="list-style-type: none"> <li>• Work-related experiences that help expand a person's self-awareness and skills relative to influencing group behavior and achieving team goals (adapted from Avolio, 2010; Groves, 2007; McCall, 2010)</li> </ul>

Understanding the public relations industry and day-to-day work experiences are significant, yet not exclusive, factors in public relations leadership development. It is important, as well, to consider economic, technological, and demographic influences.

### **Economic, Technological, and Demographic Influences**

Many studies on public relations leadership are grounded in a body of research nearly 35 years old (Grunig, 1976). Dramatic changes have come to the economy and society since that time. The past few decades have seen the rise of business strategy, globalization, economic volatility, digital technology, and shifting demographics. No known studies have examined how

these forces influence public relations agency operations and the experience of those working within public relations agencies. In order to understand the challenges faced today by public relations professionals, and specifically those working within an agency environment, it is important to review the major economic, technological, and demographic influences, particularly since 2000 and the start of the new millennium.

### ***Economic Influences***

The world within which public relations is practiced is changing dramatically. For example, the global economy has more than doubled in the past 20 years, from \$22.8 trillion in 1990 to \$53.3 trillion in 2007, with emerging markets such as India and Brazil now constituting 40 % of the world economy (Zakaria, 2008). In the new millennium, what had long been believed about companies has started to change. The U.S. economy had been built largely on the assumption of continuity – that companies would grow and be around forever, and that rationalization through cost-cutting and streamlining operations would be the key to success (Foster & Kaplan, 2000). More and more companies are likely to face a challenge that Joseph Schumpeter (1975) calls creative destruction. In creative destruction, the increasing efficiency of global markets place such economic pressure on an aging company that, if it does not change its way quickly enough, it will no longer be able to compete. Examples of companies that have thrived over time thanks to creatively destructing and evolving their products, services, and operations include GE and Johnson and Johnson (Foster & Kaplan, 2000).

Research across multiple industries has shown that, over time, the market as a whole consistently outperforms individual companies; in fact, by 2020, the average lifetime of a corporation on the S&P 500 is expected to be only 10 years, down from nearly 50 years in the 1930s (Foster & Kaplan, 2000). Companies that thrive embrace creative destruction, continually

re-thinking, refining, and re-engineering their products, services, and operations to adapt to changing or anticipated market conditions.

The public relations industry has faced three periods of creative destruction since the initial studies on public relations leadership began more than 30 years ago (Croft, 2006). These periods are 1980 to 1989, with the rise of business strategy; 1990 to 1999, with the rise of the Internet; and 2000 to the present, with the emergence of social media. Each of these periods challenged traditional methods of practicing public relations. Agencies able to adapt sufficiently and expediently survived and thrived.

Creative destruction is an increasingly important principle in the public relations industry. Public relations agencies in the United States lost, on average, 5% in revenue in 2009 alone (Barrett, 2010). Some experts consider the current economy the most uncertain since the 1930s (Bryan & Farrell, 2009). The Great Recession, as the recession that began in 2008 has been called, is different than most recessions, from which economic growth typically emerges in 18 months or sooner. That recovery did not happen this time, causing a structural break in known patterns of economic growth (Rumelt, 2009).

The economic future for public relations and business, as a whole, is uncertain. Such times require more than cost-cutting for survival and long-term success; they demand transformation through creative destruction. Companies like public relations agencies must transform their business models to let go of declining sources of competitive advantage and take advantage of emerging opportunities. This process involves greater intelligence-gathering, consideration of and planning for multiple future scenarios, and stronger internal collaboration and communication to ensure rapid and on-target adaptation (Bryan & Farrell, 2009; Courtney, 2001).

As many as 90% of business strategies are known to fail, often because of the inability to transform organizationally and successfully implement strategy (Hamel & Prahalad, 1994; Kaplan & Norton, 2001). In the most-viable organizations, including the public relations agencies that are thriving in the new millennium, strategy becomes a continual process. Employees' roles are aligned to strategy, progress is consistently measured, and new competencies are developed. In fact, in the modern economy, tangible assets are only 10% to 15% of market value; learning, growth and leadership development represent the balance of what make an organization attractive to investors (Kaplan & Norton, 2001). Research has shown that nearly half of all productivity gains during organizational change come from efforts that focus on employees' mind-sets and capabilities (Fine et al., 2009), or the way people feel and think about their work and conduct themselves in the workplace. All of these factors make it important to better understand the experience of working in a successful public relations agency.

The globalized world is not a rationalized, consistent, predictable system. In a world that increasingly demands creativity, innovation, and radical thinking, leaders are needed who can inspire, challenge, and motivate employees in more personal, less bureaucratic ways (Conley, 2009; Ritzer, 2000).

Likewise, our understanding of media economics is beginning to change. For decades, scholars have posited that spending on advertising and related media remain consistent over time, a concept called relative constancy. Studies suggested that media-related expenditures only grow when the economy grows, meaning a firm such as a public relations agency might only be able to grow the degree to which the overall economy is growing (Chang & Chan-Olmsted, 2005; McCombs & Eyal, 1980; Wood, 1986). However, more recent research indicates that digital media and the changing behavior of consumers might offer opportunities to capture and

inject new dollars into media-related industries, without necessarily having to rely upon the state of the general economy (Gaerig, 2010). None of the research to date has examined public relations expenditures as a form of media spending; however, this study should keep relative constancy, or the lack thereof, in view when examining the business of operating a public relations agency in the new millennium. Important, related factors might be at play, opening the door to further inquiry and insight.

### ***Technological Influences***

Innovations in technology and the increasing availability and usage of technology in daily life have had great influence on public relations practice and the demands placed on public relations agencies. For example, nearly 85% of public relations agencies believe that social media capabilities are either extremely or moderately important to clients (Council of PR Firms, 2010). In fact, among independently owned firms, nearly 20% expect demand for traditional media relations services to decline by 2015, while more than 90% believe demand for social media services will increase (Worldcom, 2010). It is clear that technology is profoundly influencing the business of public relations.

All types of participatory media and technological advancements – including Facebook, Twitter, Wikipedia, YouTube, and so on – challenge public relations agencies and their clients to “balance the best of the digital future without destroying the institutions of the past” (Keen, 2007, p. 185). Traditionally, media have served to facilitate mass dissemination of news, information, and entertainment. Increasingly, technology enables organizations and individuals to share information and establish relationships solely with people who share like-minded views. The world may very well be becoming, as Sunstein (2003) argues, a collection of gated communities. Public relations professionals must build rapport with a growing number of



specific stakeholder groups, while maintaining a consistent message platform and organizational reputation. This, clearly, can be a challenge.

What might be less obvious in the new millennium is what some scholars call “the end of deference” (Brown, 2009, p. 2). During the many decades of industrialization, Western society in particular believed that it was best to accept at face value what was said by people in authority. Digital media have turned the tables on that thinking. People today think of themselves as customers rather than citizens – talking back, sharing opinions, making demands, and so on. This makes the effective practice – and the effective leadership – of public relations perhaps more important than at any other point in history.

The practice of public relations is increasingly less about controlled messages and mass media and increasingly more about personalized conversations and building goodwill through one-on-one dialogue rather than mass-mediated monologue (Solis & Breakenridge, 2009). Technology allows organizations to become an accessible resource to people looking for leadership, expertise, vision, and solutions.

Much has been studied and written about the impact of technology on organizations and their public relations efforts (e.g., Eyrich et al., 2008; Key, 2005; Solis & Breakenridge, 2009; Wright & Hinson, 2009). No known studies have taken technology into consideration when assessing leadership development in public relations. The speed and transparency created by technological innovations make it vital for public relations professionals to be adept at listening, facilitating relationships, and fostering trust and credibility. The same holds true for colleague interactions within the agency setting, as well as external interactions with clients.

## ***Demographic Influences***

Economic and technological influences aside, society as a whole is shifting due to sweeping changes in demographics. This trend has particular implications for public relations leadership in the United States.

First, there are too few people with the experience needed to fill the leadership needs of American business (Deal, 2007). Generation X, or those born from roughly 1965 to 1980, would provide the primary pool of emerging leaders. But, Generation X has only 46 million members, or slightly more than half of the number of people who are part of the Baby Boom generation, which has 80 million members and provides much of the current organizational leadership (Deal, 2007; Lancaster & Stillman, 2001). The oldest members of Millennial generation, or those born from 1981 to 1999, are just approaching the time in their careers when they will take on leadership positions. The current demand for leaders caused by the small size of Generation X, and the maturation of the much larger number of Millennial professionals, creates a two-fold demand for more robust and aggressive leadership development.

Compounding this demographic shift is the fact that the number of people working in public relations roles is expected to increase 24% in the coming decade, making public relations one of the fastest-growing occupations in the United States (United States Bureau of Labor Statistics, 2008). Given the demand for leaders and the tremendous growth of public relations as a profession, it is more important than ever to understand how public relations professionals develop leadership skills and competencies. The agency environment embodies public relations practice in its purest form, a logical focus for the exploratory research of this dissertation.

## **Summary**

Organizations looking to hire public relations leaders continue to prefer candidates with agency experience. To date, no known studies have explicated what “agency experience” means, particularly in terms of how such work experience develops leadership skills. Prior research confirms that on-the-job work experiences provide a richer source of development than formal training programs or other structured learning opportunities (Edmonson, 1999; Tesluk & Jacobs, 1998). Thus, the more we can understand the experience of a public relations professional, particularly one who works in an agency setting, the better we can understand leadership development within the profession.

More than 30 years have passed since the foundational studies on public relations leadership were conducted (Grunig, 1976). Much has changed in the decades since, including the economy, technological innovations such as the Internet and social media, and demographic shifts causing a need for more leaders as Baby Boomers retire, and Millennials step up to fill the gap in numbers created by a relatively small Generation X. This study examines public relations leadership in the new millennium, within the agency setting, and through the lenses of organizational behavior and leadership development. The following chapter summarizes and synthesizes key insights from these disciplines.

## **CHAPTER 2: LITERATURE REVIEW**

Studying agency experience as a venue for leadership development begins with an understanding of scholarly work in public relations leadership, organizational leadership, and group and team behavior. It is also important to examine literature regarding the research methods previously used to study work experience. This chapter encompasses these areas of knowledge, identifying an appropriate research question within each sub-set of the literature.

### **Public Relations Leadership**

Nearly 60 years ago, scholars first defined public relations as a management function (Cutlip & Center, 1952). This marked the beginning of a movement toward leadership as a theme in public relations, although it was not until the late 1970s and early 1980s that more-systematic research about the role of public relations in organizations began. Even in the first decade or so of roles-related public relations research, however, emphasis was placed on how organizations practiced public relations, rather than how individuals led the public relations function (Grunig, 1993).

The ground-breaking studies related to public relations management and leadership emerged in the late 1970s. Broom and Smith (1978) identified four distinct roles within the public relations function, namely the expert prescriber, which involves providing acknowledged expertise on public relations; the communication facilitator, which involves monitoring and improving the quality of information; the problem-solving process facilitator, which involves

systematically analyzing and solving public relations problems; and the communication technician, which provides technical services (Broom & Smith, 1978). In its most basic sense, research on public relations leadership took root with the early studies by Broom and colleagues.

The four roles initially hypothesized by Broom and Smith (1978) were tested in classroom experiments and validated via a systematic survey of members of the Public Relations Society of America (Broom & Smith, 1979). Factor analysis of three subsequent practitioner surveys confirmed what Broom and Smith had suspected from the initial survey; that is, the expert prescriber, communication facilitator and problem-solving process facilitator roles are enacted simultaneously in the daily practice of public relations (Dozier, 1983). These three roles, while conceptually distinct, may often converge in a leader playing the role of communication manager. This finding has been tested and validated in multiple studies since the initial Dozier research was published (Kelleher, 2001; Leichty & Springston, 1996; Moss et al., 2005).

Roles-based research does not focus on leadership, per se, yet it provides the foundation upon which the scholarship of public relations leadership builds. Over the years, the communication manager role has been identified by researchers as one involved with organizational leaders in systematic planning processes and serving as a catalyst for decision-making (Berkowitz & Hristodoulakis, 1999; Wright, 1995). Some have even argued that there is a communication executive role, one almost exclusively focused on planning and decision-making, as well as a communication strategist role, one blending all four of the public relations roles into one (Dozier & Broom, 2006; Werder & Holtzhausen, 2009).

Underpinning role-related research in public relations is a body of scholarly work known collectively as the excellence theory. In 1976, James Grunig introduced organizational theory to public relations research, and subsequently developed a theory of excellence in public relations.

Excellence theory posits that organizations behave – and practice public relations – according to how the dominant coalition of organizational leaders organizes itself. Subsequent studies have demonstrated that organizations with excellent public relations have participative cultures, symmetrical internal communications and organic structure, equal opportunities regardless of gender or race, and high job satisfaction for all. Excellent public relations leaders are involved in strategic management, largely through environmental scanning and due to their experience and willingness to be team players (Grunig & Stamm, 1979; Grunig et al., 2006).

Recently, though, scholars have begun to move beyond excellence theory, trying to identify competencies necessary for individuals to be excellent – that is, effective and influential – in public relations. For example, studies have shown that a communication manager must have administrative skills, such as budgeting and planning, as well as strategic skills, such as environmental scanning and problem-solving (Leichty & Springston, 1996; Werder & Holtzhausen, 2009). Although these studies hint at public relations leadership, they do not tackle leadership head-on.

Related studies have tried to focus on leadership-specific competencies needed within the public relations field. In the private sector, analysis and a strategic perspective are most essential; in the public sector, collaboration and understanding the big picture are most important (Gregory, 2008). What seems to distinguish public relations leaders, in general, is a self-reported priority on critical thinking skills, followed closely by judgment and decision-making (McCleneghan, 2007).

Established scholars such as Linda Aldoory and Elizabeth Toth (2004) have voiced concern that there is “no strong scholarly discourse on leadership in PR” (p. 157). A few studies have since examined more deeply the dynamics of public relations leadership. For example, in-

depth interviews with senior public relations practitioners reveal that power is a shifting force within organizations, that the dynamics of a particular organization matter (such as ratio of practitioners to total employees), that the background and approach of the practitioner make a difference on his or her effectiveness, and that the qualities most important to a public relations leader's effectiveness include education level or perceived knowledge, competence, and charisma (Berger, 2005; DeSanto & Moss 2004; Lee & Evatt, 2005).

At the turn of the century, roles-related research specific to public relations leaders emerged. Studies validated that public relations leaders embody dimensions consistent with the Broom and Smith model (Moss et al., 2005; Terry, 2001). Subsequent studies dove into more specific individual characteristics needed by public relations leaders, specifically the senior leaders of public relations firms. These characteristics include professional experience and skills, personal dedication and resiliency, management interest and skills, and marketing and sales interest and skills. He or she should also have a sharp/strategic mind, creative flair, strong understanding of business and finance, rapport with people, and superb personal communication skills, while being decisive, humble, flexible, ethical, high energy, and positive (Croft, 2006; Falls, 2006).

A particularly helpful study identified 10 specific leadership competencies, or sets of behaviors, as vital to the private sector public relations industry (Gregory, 2008). This study extended prior roles-focused research by homing in on specific behaviors, using the commonly employed Universal Competency Framework and a team of organizational psychologists working in the field. The resulting 10 competencies, including sets of competencies such as 'Leading and Supporting' and 'Making Decisions and Acting,' are each defined by a sub-set of

unique, observable behaviors. The depth and nature of this study provides an important theoretical foundation for this dissertation.

Further research probes the personal qualities of communication leaders and the type of environment within which they most easily gain and maintain organizational influence (Aldoory et al., 2008; Algren & Eichhorn, 2006; Choi & Choi, 2008; Curtin & Gaither, 2005; O'Neill, 2002). This shift is exemplified by the work of Curtin and Gaither (2005) in advocating for a “circuit of culture” model for public relations, redefining the profession as a practice that provides meaning through identity, difference, and power. Curtin and Gaither, for example, challenge the public relations community to look beyond Western, rationalized norms and embrace the postmodern, cultural economy in which communication is not a product, but rather “an ongoing process of agreement and interpretation” (p. 102).

Gender is also a consideration. In public relations, women remain largely relegated to technician rather than leadership roles in public relations (Grunig et al, 2006). Women fortunate enough to be in leadership roles focus on planning and managing public relations programs, and spend less time than male peers on counseling senior management, implementing new programs, and making communication policy decisions. Underlying these leadership perspectives, female and male practitioners view power and influence similarly, and believe in personal advocacy and ethical appeals to gain influence, but disagree on the resources, tactics, and style to be used (Aldoory et al., 2008). Most men and women believe that having influence means being part of management decision-making, yet men are more inclined to feel the need to “win” or get results when seated at the leadership table. When it comes to power, men view this dimension primarily as a reflection of knowledge and data, whereas women see power as a reflection of reporting



structure and access to decision-makers. There is seemingly more than one way to position oneself as a public relations leader within an organization.

The same may not necessarily be true of mindset. Certain cognitions, such as the inclination to be present in the moment, to reflect on what others are saying, and to be playful with interpersonal communication, seem to be vital strategies in public relations leadership (Algren & Eichhorn, 2006). These cognitions may be particularly important relative to gender. In fact, by surveying public relations practitioners at varying levels, Algren and Eichhorn found that male public relations managers have higher cognitive communication competence than male technicians, but that women, regardless of role, have a consistent and consistently high degree of cognitive communication competence.

Further, social media scholars have contributed insights by articulating how communication is becoming less structured and filtered, and how public relations leaders must be active listeners who demonstrate empathy rather than authority (Brown, 2009; Solis & Breakenridge, 2009). These perspectives are beginning to be reinforced by scholarly research within the public relations discipline (Jin, 2010). This literature leads to the first research question for this study:

**RQ1:** What competencies are evident by the behavior of leaders of a high-performing public relations agency?

### **Process Approach to Leadership**

Fundamentally, leadership can be viewed using a trait perspective or a process approach. A trait perspective argues that leaders have certain characteristics and qualities that inherently make them leaders. Conversely, a process approach views leadership as “a phenomenon that resides in the context of the interactions between leaders and followers and makes leadership

available to everyone” (Northouse, 2010, p. 5). This dissertation employs a process approach to leadership, building upon the notion that leadership can be observed and learned.

A process approach helps inform how relevant leadership theories – such as leader-member exchange theory or transformational leadership – might apply to the public relations agency environment (Avolio et al., 2009; Day et al., 2006). A brief review of these theories is appropriate. The focus, here, is on models well-suited to the nature of public relations agency work, ones largely focused on individual development within the context of team-structured work. These models are leader-member exchange, path-goal, situational leadership, team leadership, and transformational leadership.

### ***Leader-member Exchange***

Each follower has unique skills and a distinct work style. Leader-member exchange theory respects these differences, encouraging the leader to form a special relationship with each follower. These dyadic, or person-to-person, relationships form the heart of leadership, which becomes an experience formed and created through the leader-follower relationship (Northouse, 2010).

### ***Path-goal***

Likewise, the path-goal approach posits that leadership is largely a dyadic influence rather than a group phenomenon (Jermier, 1996; Schriesheim et al., 2006). The leader employs the path-goal approach by removing barriers, reducing risks, and ensuring realized goals are rewarded and lead to job satisfaction (Evans, 1971; House, 1996). The practice of strategic public relations exemplifies such a goal-oriented function, requiring collaboration through diverse individual contributions.

### ***Situational Leadership***

Similarly, the situational leadership approach focuses on dyadic relationships between leader and follower. As leader and team member adapt to changing circumstances, the leader uses such situations as coaching opportunities (Fernandez & Vecchio, 1997). Situations are any instances in which a non-manager may lack the competence or commitment to successfully fulfill his/her responsibilities. The leader provides a certain type and degree of coaching based on where the non-manager is in terms of professional development and personal conviction (Northouse, 2010). This customized approach can yield greater job performance, satisfaction with supervision, overall satisfaction, commitment, role clarity, competence, and retention, particularly among newer employees (Gerstner & Day, 1997; Thompson & Vecchio, 2009). Such an approach may be particularly effective in public relations, a profession that is largely situational and requiring practitioners to adapt to ever-changing information, issues, stakeholders, and so on. Additionally, public relations professionals employed by agencies must contend with multiple client organizations, each with its own structure, culture, and daily set of situational challenges.

### ***Team Leadership***

Agency professionals work largely on account teams, and rarely on solo programs or projects. The team leadership approach focuses on workflow and team dynamics. The leader continually assesses and addresses the team's developmental needs (Burke et al., 2006; Zaccaro et al., 2001). The most-successful teams, and perhaps then the most-successful agencies, have clear direction, a results-driven structure, competent team members, and expert coaching (Zaccaro et al., 2001).

The team leadership model views leadership as the driver of team effectiveness. The leader fulfills her or his responsibility by continually making a series of decisions – monitor the team or take corrective action? take action regarding tasks or relationships? address internal or external factors? – then identifying and addressing the team’s developmental needs. (Northouse, 2010).

### ***Transformational Leadership***

Much like law firms, public relations agencies grow through billable hours. The work itself can become a grind. Transformational leadership motivates followers to rise above expectations and put the organization before their own self-interests; they do this because of inspirational motivation, intellectual stimulation, and individualized consideration (Avolio et al., 2009; Kuhnert, 1987; Northouse, 2010). The transformational leader helps clarify team goals, foster creativity, and helps followers reach their full potential (Nemanich & Keller, 2007).

The review of the process approach to leadership leads to the second research question for this study:

**RQ2:** Which model, if any, best reflects the leadership process within a high-performing public relations agency?

### **Group and Team Behavior**

Studies about workplace groups and teams date back to pre-World War II, and have helped us better understand behavioral principles such as leadership and role definition (Levine 1998). The concept of a group is difficult to define, and, in fact, the characteristics of a group can and do change over time. Given this constraint, some researchers prefer to focus on social integration – that is, the degree to which a person is socially integrated and therefore acts like a group member, rather than an individual. Small groups, like public relations agency account

teams, would be expected to have relatively high degrees of social integration because members are involved in multiple activities and spend considerable time together (Levine, 1998).

As noted earlier, public relations professionals often operate within an open system, requiring them to manage multiple complex relationships, adapt to continual changes in the external environment, and work collaboratively to accomplish strategic goals (Grunig, 2006). Research suggests that public relations practitioners lack consensus on the role their profession plays, as well as the role they, as individual professionals, play (Berkowitz & Hristodoulakis, 1999; Thurlow, 2009). Studying group and team behavior within public relations agencies, then, is an important step toward better understanding public relations leadership and team performance, as well as factors that influence role clarity, job satisfaction, professional development, and career mapping for individual practitioners.

The following section addresses key aspects of group and team behavior – commitment and citizenship, and communication and collaboration.

### ***Commitment and Citizenship***

For generations, young adults wishing to start a career in public relations have asked themselves, or been asked by others, “Agency or corporate?” This question intimates a dichotomy of experience within the professional realm of public relations. An aspiring public relations professional must make a conscious decision to join an agency and counsel clients from the outside, or join a corporation or other organization and support public relations efforts from the inside. Either path involves some degree of organizational commitment and citizenship.

Research regarding organizational commitment may be particularly helpful in understanding the experience of those who choose to work for a public relations agency. By definition, organizational commitment refers to the psychological sense of belonging that a

person has to the organization that employs him or her (Allen & Meyer, 1996). This commitment may be affective, continuance, or normative in nature – that is, emotional, rational or obligatory. More than 40 studies have confirmed that organizational commitment is exemplified in one of these three ways.

Commitment to a public relations agency, or any organization for that matter, begins with socialization. This is the cultural process through which a professional comes to know and understand the values and norms of an organization, as well as the social knowledge and skills necessary to fulfill a certain role (Baron & Kenny, 1986; Chatman, 1991; Van Maanen & Schein, 1979; Weick, 2001). Public relations professionals are newcomers to an organization when they first join a public relations agency; they become ‘new’ group members again when they are assigned to an account team serving a new client. Time and again, employees of public relations agencies must socialize and integrate with new and different account teams within the agency, as the client roster changes over time.

Research has shown that people learn about their work roles from how they are socialized within the organization, meaning formally or informally, individually or as part of a group of new employees, sequentially or randomly, and so on (Baron & Kenny, 1986). Of course, every public relations agency – and the socialization of every new agency employee – is different. Regardless, professionals being socialized into new roles should be mindful of the amount of change they are undergoing, the degree of contrast between the new experience and prior experiences, and the effect that surprise and other emotional reactions have (Louis, 1980). Certainly, these lessons apply to public relations agency professionals who work on an evolving set of account teams, often requiring multiple periods of socialization and re-socialization.

A helpful study tracked 171 junior auditors at eight different accounting firms in the U.S., and did so over a 30-month period (Chatman, 1991). Socialization, as measured by respondents' self-recorded activity logs, was one of several dimensions studied, along with job satisfaction and intent to stay or resign, which can be viewed as a reflection of one's degree of organizational commitment. Controls included the grade point averages and tenure of the junior auditors. The research found that the more effort put into employee selection, the less socialization that person will require. Moreover, spending time with a mentor and attending company events are activities positively associated with person-organization fit at the one-year mark. How strongly a person fits an organization was shown to predict job satisfaction and intent to stay, or sense of commitment.

Socialization is one of several factors that lead to organizational identification, or when a person begins to define himself or herself by beliefs held about the organization to which he or she belongs (Pratt, 1998). This sense of belonging is most likely to occur when individuals and organizations have similar values, and when membership in the organization brings a sense of self-enhancement. Over time, organizational identification can depersonalize someone, causing them to no longer think they are unique or special. This result may seem negative, but that may not necessarily be the case. A strong sense of organizational belonging and attachment, cultivated through identification and internalization, has shown to be positively associated with social behavior and negatively associated with turnover (O'Reilly & Chatman, 1986). That people opt to join a certain public relations agency – and stay with the agency – may be a reflection of the appropriate selection, effective socialization, and self-enhancing job satisfaction provided by that agency.

Beyond nurturing a sense of organizational commitment, a public relations agency may also foster organizational citizenship, or behaviors that help the organization but which are not part of a person's job requirements and, in fact, may prove detrimental to advancement. Examples include volunteering for additional work, helping others finish their work, or socializing new employees to their roles (Bergeron, 2007; Bolino, 1999). Reward systems in many organizations, particularly public relations agencies, are based on task performance. Organizational citizenship behavior may impede a professional's advancement because it detracts from required and rewarded tasks. Research indicates that people concerned with performance and advancement should minimize their organizational citizenship behavior, focus on the citizenship activities that are visible to management, and communicate openly with a direct supervisor to ensure that citizenship behaviors are not in conflict with role expectations (Bergeron, 2007). Indeed, a survey of more than 300 workers revealed that employees often have widely varying thoughts about what constitutes required, or in-role, behavior versus voluntary, or extra-role, behavior; these differences are closely related to a person's sense of organizational commitment, as well as social cues experienced in the workplace (Morrison, 1994).

Factored into organizational citizenship behavior is impression management, or the process of controlling information and one's actions to influence the impressions formed by those actions (Bolino, 1999; Schlenker, 2003). If an account assistant at a public relations agency wishes to be seen as a good citizen of the organization, he or she may take on extra duties to display organizational citizenship behavior. People may simply want to reinforce an existing impression of good citizenship, or they may perceive that others do not view them in the way they wish to be regarded (Bolino, 1999). To be effective at impression management and self-



presentation, one must care strongly about perceptions others may have, and he or she must feel confident that they can create the desired perceptions (Schlenker, 2003).

Self-monitoring has been shown to have a significant effect on career progression. In a study tracking M.B.A. graduates over a five-year period, those who scored as high self-monitors were more likely to change employers, move locations, and get cross-company promotions (Kilduff & Day, 1994). Among those who stayed with their companies, the high self-monitors were more likely to get promoted. In the public relations agency business, then, we would expect to see high self-monitors moving up within the agency over time, or jumping ship and landing a promotion with another organization, be that an agency, corporation, or other type of employer.

As a person advances to a more-senior role, he or she must adapt to the new role. This behavior involves observing role models within the organization, experimenting with a new or “provisional” self in controlled settings, and assessing how this new self fits relative to internal standards and external feedback (Ibarra, 1999). Notably, the study from which these findings were gleaned involved field research within an advertising and public relations agency – similar, in spirit, to the dissertation for which this literature review has been compiled.

### ***Communication and Collaboration***

Making sense of things is a social and ongoing process involving near-continuous communication among group members (Weick, 1995). Indeed, reality within an organization is constantly being negotiated and shaped through group and team interaction. This process is especially true for a public relations agency, an organization that continually adds, refines and disassembles account teams, based on client acquisitions or attrition. Communication and collaboration are essential behaviors, and ones often grounded in information diffusion.

Public relations professionals facilitate the exchange of information between an organization and important stakeholder groups such as employees, customers, and investors. Information-seeking might be seen as the first step in a process of communication and collaboration that subsequently involves filtering and sharing information. By definition, information-seeking behavior involves purposeful searching for information in order to realize a goal (Wilson, 2000).

Information-seeking is important for many professionals, not just public relations practitioners. Through meta-analysis of prior research, Leckie and colleagues (1996) developed a model of the information behavior of professionals, specifically a model drawn from the measured or observed behaviors of engineers, health care workers, and lawyers. This work revealed that dimensions of work roles, the associated task in question, and information needs significantly influence information behavior. In addition, three aspects of information-seeking play a vital role – awareness that information might exist, readily available information sources, and anticipated outcomes of seeking information.

Information-seeking is vital for employee's short-term socialization and long-term success. In a study of new staff accountants, the frequency with which new employees seek information during the first six months on the job relates to how well they define and master their roles (Morrison, 1993). Applying this learning to the public relations agency environment, it might be expected that public relations professionals seek information often, not only during the first few months of employment, but the first few months surrounding each new account team assignment.

Specific to information-sharing, most studies in the public relations body of literature look at the effects of information-sharing across organizations or groups beyond the public

relations account team or department. For example, research has shown that information-sharing in the form of an employee communications program helps influence how well a person adapts to a new organization and role (Jiang & Luo, 2008). Although important, studies like this do little to inform our understanding of how information-sharing happens within a public relations team.

From prior research on collaborative information behavior in healthcare settings, we know that work groups collaborate when information needs are complex, when information is not readily accessible, and when there is a lack of expertise in a certain area (Reddy & Jansen 2007; Reddy & Spence, 2007). By definition, collaborative information behavior involves situations in which employees work together to identify or resolve a shared information need.

Information-sharing is a complex behavior. In a test of individual versus group decision-making among students, shared information was found to be more influential on group judgments than information held by only one member of the group (Gigone & Hastie, 1993). On average, though, individual judgments were just as accurate as the group judgments. In a political caucus simulation, Stasser and Titus (1985) found that group discussions perpetuate individuals' distorted perceptions of political candidates. Group discussion tends to focus on information that members already hold in common prior to discussion, and information that supports pre-conceived opinions.

Subsequent research confirms that group discussions – and therefore, group decisions – tend to focus on previously shared information, versus newly shared information (Larson et al., 1994). This finding has important implications for public relations agency professionals who work in account teams and must address client needs by working collaboratively.

Evidence exists that the quality of group decisions among professionals is positively influenced when there is a process for interacting, a procedure for making decisions, and a person serving as moderator (Vinokur et al., 1985). This study was completed in the setting of a professional conference, however, with professionals who do not necessarily work together daily or closely. The research setting is much different than the setting of a public relations agency, in which employees must work together, and do so on a regular basis.

What would happen in an agency setting if people did not have assigned physical spaces? Would information-sharing practices change? In an uncontrolled experiment, advertising agency Chiat/Day attempted “hotdesking,” a process in which employees no longer had assigned offices. Employees checked out laptop computers when they came to work, and sat wherever they wished to do their tasks. The idea was to foster creativity and collaboration. The owners ultimately abandoned hotdesking, as the concept turned out to be too disruptive. The incidental learning that comes with assigned offices had all but disappeared, and people invested far too much time and energy each day trying to establish some sense of order (Dix, 1994).

Ultimate, agency professionals – such as public relations practitioners – need one another, and need to share information with one another in order to thrive. Sonnenwald and Pierce (2000) describe dynamic work groups, like public relations agencies, as ones in which no single individual can gather and process all of the information necessary to successfully complete a task. In observations of groups over time, the collaboration process differs dramatically from group to group, with activities and issues rarely following sequential, logical progressions (Gersick, 1988).

A particularly intriguing study on dynamic work groups assessed information-sharing among soldiers in simulated battlefield conditions. The researchers found that, in order to attain

troop goals, soldiers must have a shared understanding of the situation and communicate frequently. All the while, though, some individual soldiers may display “contested collaboration” – that is, the outward appearance of collaboration while working to further their own individual interests, regardless of how that may affect the group outcome (Sonnenwald & Pierce, 2000). This finding may have interesting implications for public relations agency professionals, given that agencies are often platforms from which young professionals get promoted to larger account management roles, or recruited away by clients or other organizations for emerging leadership roles.

At the very least, varying degrees and sources of authority and power, as one would find in a dynamic work group like an agency account team, influence collaboration and innovation (Ibarra, 1993). In addition, how a person’s expertise is attributed – be that task-oriented or social – has some effect on influence within a group (Bunderson, 2003). For a public relations account team, which is likely to be centralized, somewhat self-managed, and not necessarily long-term in tenure, social cues might have stronger influence than task cues. A certain professional may be considered an expert simply for the social ability to motivate or inspire others, rather than for a tactical skill such as strategic planning.

Generally, a group’s influences on individual behavior involve information, as noted earlier, or affect, which is a combination of emotions and mood (Bartel, 2001; Hackman, 1992). These influences may be ambient and experienced by all group members, or discretionary, meaning they are targeted at certain individuals in order to educate, socialize, reprimand, create uniformity, and so on. Positive emotional contagion improves cooperation, decreases conflict, and increases performance within groups involved in controlled experiments (Barsade, 2002).

Additionally, the more that group members' moods align, the greater chance for interdependence, stability, and mood regulation within the group (Bartel, 2001).

What might interdependence and stability mean, though, for a small group like a public relations account team, which may generally include no less than a half-dozen members? If these qualities reflect effective leadership, and the leader is open to constructive feedback, we might find individuals willing to raise their voices regarding the functioning of the team or agency (Detert & Burris, 2007). The work environment, though, must provide a sense of psychological safety, a shared belief among group members that it is okay to take risks (Detert & Burris, 2007; Edmondson, 1999). Such an environment is characterized by a sense of trust, respect for one another's competence, and a spirit of caring among team members. From a field study of more than 50 work teams, we know that psychological safety is associated with team learning and growth (Edmondson, 1999). Long-term success for a public relations account team, then, might be as much about collective team psyche as the competence of individual members within the team. This assessment leads to the third research question for this study:

<b>RQ3:</b> How is collaboration exemplified within a high-performing public relations agency?
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### **Studying Work Experience**

As Schein (2004) attests, organizational culture is “the result of a complex group learning process that is only partially influenced by leader behavior” (p. 11). Studying work experience in a public relations agency, then, involves observing and analyzing the actions and interactions of agency employees at all levels, not just formal leaders.

Ibarra has studied workplace experience in an agency setting. In 1993, he conducted a series of unstructured interviews, followed by structured interviews, within an advertising and

public relations agency. Through this qualitative inquiry, Ibarra found that collaboration and innovation within an agency may be influenced by the levels and sources of authority and power involved in the process. Gersick (1988) had previously found similar results through qualitative inquiry with multiple work groups in non-agency settings.

Scholarly literature has a gap specific to work experience in a public relations agency setting. Therefore, two theoretical models from organizational behavior literature and specific to work experience will help form the framework for this study: a hypothesized “agency experience” model, adapted from Edmonson’s (1999) concept of psychological safety, and the “work experience” model espoused by Tesluk and Jacobs (1988), who contend that understanding day-to-day work experience is of significant importance, as it is the means through which most professional development happens (Avolio et al., 2009).

### ***“Work Experience” Model***

Tesluk and Jacobs (1988) are credited as the first scholars to view work experience as a blend of quantitative measures, qualitative measures, the interaction of quantitative and qualitative measures, and contextual influences. Their model is helpful in beginning to assess the work experience of public relations agency professionals (see Table 2.1).

**Table 2.1: “Work Experience” Model (Tesluk & Jacobs, 1988)**

Quantitative Measures	Qualitative Measures	Quantitative/Qualitative
Role tenure	Task variety	Density
Task frequency	Task complexity	Timing
Contextual Influences		
Department structure Team diversity Industry norms		

In this model, quantitative measures include role tenure, or how long someone has served in a role, and task frequency, or how often someone is engaged in work responsibilities versus non-task, non-productive activities. These measures tie well to the concept of adaptation, for they drive at helping measure commitment (i.e., tenure) and citizenship (i.e., task focus).

Qualitative measures include task variety and task complexity, or how different or difficult the various tasks are that a person performs. Tesluk and Jacobs (1988) suggest that qualitative description and analysis of such measures will yield deep and meaningful understanding. Knowing that a task involved a media relations crisis about a natural disaster is more meaningful to understanding public relations agency experience research than simply knowing the task was a level 4, on a scale from 1 to 5, with 5 being the most-complex work possible.

Tesluk and Jacobs' (1988) work experience model is truly distinguished by the measures that reflect the interaction of quantitative and qualitative aspects. These include density and timing. Density refers to whether tasks being performed are successively more challenging. Timing refers to such aspects of work experience as whether a task was coupled with direction or feedback, and at what point in a person's tenure with the organization such a task was assigned. In a public relations agency environment, we might find significant variation from individual to individual, due to the rapid pace and competing demands often associated with agency work.

Rounding out Tesluk & Jacobs' (1988) model are contextual influences, including department structure, team diversity, and industry norms. Again, such measures are relevant to the public relations agency environment because no two account teams or agencies are similar, and even within a single agency, teams may be working with clients in vastly different industries.



For the dissertation, the Tesluk/Jacobs model provides a base from which to systematically record the day-to-day work experience of agency professionals within a group setting. However, the model falls short in helping understand group behavior as a whole, and the outcomes of group behavior that might help foster learning, growth, and leadership development and emergence. To fill this gap, an “agency experience” model is proposed as a secondary model.

### ***“Agency Experience” Model***

Edmonson (1999) studied 50 work teams in field settings, using quantitative and qualitative methods, in identifying the concept of psychological safety, or a shared belief among group members that risk-taking is permissible. It is this phenomenon, Edmondson attests, that yields growth and learning, and from which we might expect leadership behavior to emerge (see Table 2.2).

**Table 2.2: “Agency Experience” Model (adapted from Edmonson, 1999)**

	<b>Adaptation (trust)</b>	<b>Collaboration (respect)</b>	<b>Growth (caring)</b>
<b>Associated Concepts</b>	Socialization	Information-sharing	Psychological safety
	Impression management	Affect	
<b>Related Measures</b>	Commitment	Collaboration	Voice
	Citizenship	Group mindset	Risk-taking

In this model, trust, respect, and caring are the qualities necessary for psychological safety. They are applied to the adaptation, collaboration, and growth phases of the agency experience. Adaptation involves learning to trust others, collaboration involves respecting colleagues’ competence, and growth involves caring for others, and being open to their ideas and opinions. Adaptation measures might include asking an agency professional about the degree to

which he or she feels committed to staying with the agency (quantitative), or observing and recording organizational citizenship behaviors he or she displays (qualitative), such as volunteering to take on extra work or socializing a new employee.

Collaboration measures might include asking each account team professional about the degree to which he or she feels the group effectively shares information or collaborates (quantitative), or observing and recording the mood and emotions displayed by group members and then further probing through structured, one-on-one, private interviews (qualitative). Growth measures are the most important for this model, because they would suggest an environment in which leadership behavior should emerge. Measures within this construct might include the frequency with which individuals raise their voices in contrast to group-held beliefs (quantitative), or discussing in structured, one-on-one interviews why an individual does or does not feel comfortable raising one's voice or taking work-related risks (qualitative).

### ***Development Experiences***

Certain day-to-day work experiences can, over time, be acknowledged by professionals as powerful learning experiences that helped form their leadership skills (McCall, 2010). Interviews and open-ended surveys of executives identified three types of these experiences: creating change, having a high level of responsibility, and influencing without authority (McCall et al., 1988) (see Table 2.3). Creating change may involve being responsible for developing new directions, inheriting problems, deciding about staff reductions, or managing problems with employees. Having a high level of responsibility may be exemplified by high-stakes projects, diverse accountabilities, job overload, or external pressure.

**Table 2.3: Powerful Task-related Development Experiences (McCall et al., 1988)**

<b>Creating Change</b>	<b>High Level of Responsibility</b>	<b>Influencing without Authority</b>
New directions	High stakes	
Inherited problems	Business diversity	
Reduction decisions	Job overload	
Problems with employees	External pressure	

The review of how work experience may be studied leads to the fourth research question for this study:

<b>RQ4:</b> How is the phenomenon of leadership development experienced by professionals through their day-to-day work in a high-performing public relations agency?
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### **Summary**

For decades, scholarly research in public relations leadership has been rooted in organizational structure and roles. More research is emerging that addresses the competencies, behaviors, and culture necessary for a public relations leader to be effective and successful.

Leadership may be viewed as a collection of traits possessed by an individual or as a process involving leaders and followers. This dissertation takes a process view of leadership, examining theories and models of organizational leadership seemingly well-suited to the group and team nature of public relations agency work.

Commitment, citizenship, communication, and collaboration emerge from the body of organizational behavior literature as important dimensions for studying public relations agency professionals. With these dimensions as a broad framework, the research methods employed must build upon best practices from prior studies about work experience, including fieldwork related to the public relations agency environment.

## **CHAPTER 3: METHODS**

### **Research Questions**

The following four research questions were proposed for the field study of leadership development within a high-performing public relations agency:

**RQ1:** What competencies are evident by the behavior of leaders of a high-performing public relations agency?

**RQ2:** Which model, if any, best reflects the leadership process within a high-performing public relations agency?

**RQ3:** How is collaboration exemplified within a high-performing public relations agency?

**RQ4:** How is the phenomenon of leadership development experienced by professionals through their day-to-day work in a high-performing public relations agency?

### **Research Design**

Answering these questions involved exploratory research in a specific setting, using qualitative methods of inquiry and subsequent interpretive analysis. Indeed, by its very nature, qualitative research “makes room for the unanticipated, thus focusing more on specific cases and exceptions than on abstractions and generalizations” (Van Maanen, 1998, pp. xi).

Tesluk and Jacobs (1998), in their plea for more research regarding work experience, cite the importance of qualitative methods in largely unexplored industries. For this study, qualitative inquiry helped identify a model of public relations agency experience that may be further tested

through qualitative replication in alternate field settings, quantitative methods, or a mixed-method approach.

### Case Study Approach

This dissertation ultimately takes the form of a case study, specifically one that is institutional and ethnographic in nature (see Appendix 1). Such an approach is appropriate given the exploratory nature of the research (Van Maanen, 1988). However, while an ethnographic investigation in a single setting may indeed be considered a case study, it is important to explicate what is meant by a “case” and clarify how a case study is methodologically different from other kinds of studies (Ragin, 1992). In qualitative research within the public relations field, a case study is generally considered “an intensive examination, using multiple sources of evidence – that may be qualitative, quantitative or both – of a single entity which is bounded by time and place.” A case, then, “may be an organization, a set of people such as a social or work group, a community, an event, a process, an issue or a campaign” (Daymon & Holloway, 2002, p. 105). Clearly, a public relations agency, as both an organization and a work group, qualifies as a case by this definition.

The purpose of doing a case study in public relations research is “to analyze processes and their results, emphasizing the dynamic nature of the phenomena” (Van Ruler et al., 2008, p. 237). Indeed, case studies help us focus on institutions and the ways in which programs and processes shape individuals through day-to-day experiences, for organizations such as public relations agencies are simply systems of socially created meanings (McCoy, 2006; O’Donnell-Trujillo & Pacanaowsky, 1983). Examining such institutions helps us understand how organizational life is meaningful to its members.

Several previous research efforts, including a case study within an advertising and public relations agency, have used, at least in part, methods of inquiry similar to those described on the following pages (Edmondson 1999; Gersick 1988; Ibarra, 1993). Each study examined the daily actions and interactions of employees, both leaders and followers, in workplace settings. Each study also used triangulated methods.

### Triangulated Methods

Mixed-method research that is largely qualitative in nature should be rigorous and disciplined, just as a purely quantitative study should be (Fortner & Christians, 2003). Using multiple research methods, a process called triangulation, helps ensure validity (Creswell, 2003; Denzin & Lincoln, 2003). Thus, the research design for this inquiry involved a triangulation of methods:

- longitudinal financial analysis of the 100 highest-grossing, independently owned public relations agencies in the United States, to determine a feasible research site;
- three weeks of participant-observation within one of the agencies identified as high-performing, that is having achieved significant revenue per employee and sustained that level over a five-year period; and,
- semi-structured interviews with public relations professionals (both those in formal leadership roles and those who are not) employed by the agency serving as the research site, to provide context for, and deepen the understanding of, observed behaviors and the institutional view of employees.

Some supplemental information about the research site was gleaned from a non-systematic review of organizational information, including the agency's website and marketing materials. This information was largely used to provide the researcher with additional context about the organization and its history and culture.

## ***Research Protocol***

### **Site Selection**

In order to identify an appropriate research site, an economic analysis of the top 100 independently owned public relations agencies in the United States was conducted, using five years of financial metrics self-reported by the agencies (*PR Week*, 2006-2010). The analysis used self-reported revenue and headcount of the nation's independently owned agencies for calendar years 2005 through 2009. *PR Week* was chosen rather than *O'Dwyer's*, the other national trade publication that publishes annual agency financials, because *PR Week* reports total revenue, which might include mark-ups and ancillary revenue, while *O'Dwyer's* reports only fee income.

As noted in Chapter 1 (Introduction), a high-performing public relations agency is one that exemplifies three measurable qualities, namely efficiency, or revenue per employee; growth, or percentage of revenue increase over a five-year period; and longevity, or continuous operation over that same five-year period. These three qualities were analyzed to determine suitable sites for this study.

### **Efficiency**

Among the 100 agencies included in the financial analysis, annual efficiency – that is, revenue per employee during a calendar year – ranged from a low of \$93,169 to a high of \$387,383 over the course of the five-year period from 2005 through 2009. Average annual efficiency ranged from \$145,350 in 2004 to \$166,235 in 2009. Only 32 agencies had an efficiency rate in 2009 higher than the industry-wide average.

### **Growth**

A typical measure of agency growth is increase in revenue over time (Croft, 2006). Revenue growth alone does not take into account the amount of staff and related

overhead to achieve such numbers, however. To arrive at a more-meaningful assessment of business growth, agencies' 2009 efficiency (revenue per employee) ratios were compared with 2005 efficiency ratios. Agencies gained, on average, \$20,886 in growth efficiency during the five-year period. The efficiency gains were as high as \$130,411 for one of the agencies, while efficiency losses were as much as \$211,742 for another, a wide range indicating the volatility of the public relations industry, as well as the volatility of the economy, as a whole, during this time.

### Longevity

Longevity was the third key metric used to identify an appropriate research site. Agencies were discarded from analysis unless they had been in operation since at least 2004, prior to the Great Recession that began in 2008, and had publicly disclosed key financials in *PR Week's* annual agency reports. Using these criteria, 31 of the original 100 agencies were dropped. This process left 67 agencies as the universe from which a viable research site could be identified and recruited (see Appendix 2).

### Site Recruitment

Of the 67 agencies remaining from the economic analysis process, 28 agencies had higher-than-average efficiency compared to the five-year average of all agencies from the original sample. Twenty-five agencies were subsequently identified as viable research sites, based on geographic proximity and perceived accessibility, taking into account the limited time and money available for dissertation research. The 25 agencies were systematically contacted via e-mail (see Appendix 3) in July 2010, until at least three of the agencies expressed interest in serving as the research site. Several themes of concern emerged from these original contacts, including the time that might be required of a supervisor, whether other agencies within a



competing geographic area would be participating in the study, and how the findings would ultimately be used. These concerns were addressed in follow-up communication with the agencies.

The three agencies were provided with a working draft of the research design in mid-August 2010 and given until August 30, 2010, to share feedback about the proposed protocol (see Appendix 4). Following approval of the study by the UNC Institutional Review Board, one agency was chosen as the research site for this investigation. The selection was based on ease-of-access, amount of expense required to conduct fieldwork, and the degree to which the agency seemed comfortable with the proposed research design. The selected agency was contacted by phone, and that conversation was formally documented via e-mail, once immediately following the conversation and a second time, once the UNC Institutional Review Board had assigned a unique number to identify the study (see Appendices 5 and 6). The agencies not selected as the research site were notified via e-mail (see Appendix 7).

### Interview Participation

Detailed protocol for observations and interviews is shared in later pages of this chapter of the dissertation proposal. It is important to note, though, that studying the process approach to leadership, and the phenomenon of leadership development, required observing and examining interactions between leaders and followers, as well as between followers (Avolio et al., 2009; Day et al., 2006). This understanding informed the participant selection process for this study.

Thus, the participants studied were full-time employees of a high-performing public relations agency, including those in formal leadership roles as well as those who have no management or supervisory responsibilities. My role as participant-observer among account

teams allowed me to observe many happenings among different individuals and employee groups throughout the day.

Members of the observed account teams who agreed to be interviewed were interviewed individually, and in private. Emphasis was placed on those employees who had joined the agency within the past six months, or who had joined a new account team within the past six months, as we know from existing research that information-seeking and role-clarification during the first six months of a new role are vital for long-term success and professional development (Morrison, 1993).

### Protection of Human Subjects

This study was designed under the guidelines of, and earned the approval of, the Behavioral Science Institutional Review Board of the Office of Human Research Ethics (OHRE) at the University of North Carolina at Chapel Hill. OHRE is responsible for ethical and regulatory oversight of research involving human subjects.

All members of the agency were notified that participation in the study was voluntary, and that individuals' names would not be identified in the case study. Generic job titles were used to represent research participants, and any identifying details about the agency and its clients were withheld from this dissertation.

### **Data Collection**

The data collection process for this study involved three weeks of field research within the office setting of the headquarters of a high-performing agency. The field research included daily participant-observation within the agency, as well as a series of semi-structured interviews with employees willing to be interviewed. The first week was reserved largely for observations,

the second week consisted of observations and interviews, while the third and final week was used primarily for observations that concentrated on themes emerging from the interviews and prior observations. Participant-observation and interview methods are explained in further detail in the following pages:

### ***Participant Observation***

Conducting a field study positions the researcher as both a participant and observer. It is through participant-observation that a researcher gets close enough to the experience of those being studied to understand how a certain reality is constructed socially (Lofland et al., 2006). The researcher must simultaneously pay attention to details and the broader context (Alvesson & Deetz, 2000). A theoretical framework may be helpful in focusing the observation process; however, the researcher must be aware of blind spots imposed by that pre-determined framework.

Participant-observation is not a sweeping analysis of culture or society; rather, participant-observation is an “examination of lives of particular people in concrete yet constantly changing human relationships” (Denzin & Lincoln, 2003, p. 271). The researcher’s presence is always felt, during the observation as well as in the interpretation that stems from the observation period. The end result of participant-observation is ethnography, or the written representation of a culture (Van Maanen, 1988). In this dissertation, the ethnography takes the form of a case study in leadership development.

Participant-observation enables the researcher to experience first-hand the customs, language, rituals, and norms of a bounded group of people (Van Maanen, 1988). For this dissertation, that group of people consisted of employees of a high-performing public relations agency, one whose revenue-per-employee has averaged among the 50 best in the U.S. since 2005

and the rise of social media and the downturn of the American economy. As participant-observer, I worked within the agency, simultaneously contributing to group dynamics and observing group behavior.

When conducting participant-observation research, the researcher should take as many notes as possible, record them as soon as possible following the observed behaviors, and include his or her insights and perceptions. Additionally, the researcher should begin the fieldwork with very broad note-taking, then narrow his or her focus as the research progresses, concentrating on what seem to be the most-salient observations (Denzin & Lincoln, 2003; McCoy, 2006).

#### Observation Protocol

Observations were limited to happenings within the agency's office. Off-site events, such as client meetings, were not observed.

All notes were handwritten on-site then transcribed to a secure, electronic document. This master repository resembled an activity log.

Observations were made and recorded while helping the agency as a non-paid participant-observer. A concerted effort was made to record most observations as they were happening, or immediately following their conclusion.

An observation guide was developed for this study (see Appendix 8). Handwritten notes were taken broadly about happenings, the group members involved, and the interactions taking place. To help aid later analysis, I added personal insights about why people might be acting the way they are, or why there seemed to be variations in behavior (Daymon & Holloway, 2002).

Note-taking drew from the Tesluk and Jacobs (1988) model of work experience, and the Edmondson model (1999) of psychological safety, as previously detailed. Notes were made about important variables previously identified by Tesluk, Jacobs and Edmonson, including task

frequency, task variety, task complexity, density (or whether the new task was successively more complex than prior completed tasks), and timing (or whether the task was in any way coupled with direction or feedback) at an individual level, as well as employee socialization, information-sharing, voice-raising, and risk-taking at the group level. These notes help answer Research Questions 1, 2 and 3, which inquire about leadership competencies/behaviors, leadership process, and collaboration. Notes begin broadly, then narrow as the study progresses, and as the most-important characteristics become evident.

Notes were reviewed while the field research is in progress, as well as immediately after the field research had been completed. A constant-comparative method was used, in which the researcher reviews notes multiple times, identifying the themes which appear to be most prevalent and powerful, given group dynamics and behavior (Strauss & Corbin, 1988). Categories were expanded or collapsed, as appropriate, until no new categories could be identified. Notes were then reviewed an additional time to identify specific, salient examples for inclusion in the written case study.

### ***Semi-structured Interviews***

Interviews are used “to gather qualitative data in which a researcher encourages a participant to freely articulate their interests and experiences” (Lindlof & Taylor, 2002). They help the researcher gather information that cannot be observed effectively, understand participants’ experiences, shed light on past events, validate information obtained in other ways, and provide an authentic perspective of the institution grounded in the words and recollections of its everyday members.

Particularly for this study, it is important to remember that interviews are never neutral (Denzin & Lincoln, 2003). Interviews involve at least two people in dialogue, together shaping a

reality. Likewise, interviews only shed light on specific interactional episodes; the themes that emerge from interviews cannot be generalized to all participants. Still, in order to understand a phenomenon like leadership development, which in and of itself cannot be easily observed, interviews provide invaluable context, depth and perspective.

For the field research, a semi-structured interview approach was used. Semi-structured interviews follow a pre-determined interview guide, or set of general questions that help guide the dialogue, and ensure that each research subject addresses the same general set of topics (Daymon & Holloway, 2002). This approach helped maintain the interviewee's focus and reduced the amount of unusable data, while still allowing some degree of flexibility in terms of probing, or follow-up, questions. The intent of the study is to understand agency work experience as a whole, and semi-structured interviews helped keep interviewees talking mostly about work experience and not extraneous matters, such as personal issues at home.

#### Interview Protocol

Interviews were conducted with as many agency employees as possible who had been observed in daily interactions and who volunteered to participate in interviews. This included a mix of employees in formal leadership roles and those who are not yet managers. Interviews help answer Research Question 4, which inquires about how the phenomenon of leadership development is experienced. The interviewing process continued until no new themes or insights about leadership development emerge.

Interviews were conducted, largely, during the second of three weeks of field research. Interviews lasted, on average, about 20 minutes each. Each interview was conducted in a private setting within the agency, and digital audio recordings were made. Transcriptions of the recordings were made offsite, following the completion of the three-week data collection period.

Subjects had the option to decline participation in the interview process, or to quit the interview process at any time. Other inclusion criteria included employees who happened to be working during those three weeks and available to be observed and/or interviewed.

Accommodations were not made for employees who happened to be on vacation or leave, or who were on business travel or telecommuting.

An interview guide was developed (see Appendix 9). Interviews were semi-structured, ensuring all respondents address the same general topics, yet empowering each respondent to infuse his or her own unique perspective. The interview guide built upon the observation guide, helping focus discussion on specific happenings and behaviors. As with recorded observations, only job titles were used in the interview transcripts.

### ***Protection of Field Notes and Interview Recordings***

Field notes and audio recordings of interviews will be kept in a locked file, in a locked office, for two years following the completion of data collection, as required by the UNC Institutional Review Board. The researcher is the only person with possession of a key for the file cabinet in which the notes and recordings will be stored. At the conclusion of the two-year archival period, the field notes will be shredded and the audio recordings will be destroyed.

## **Data Analysis**

### ***Interpretive Approach***

An interpretive approach to qualitative data analysis involves focusing on socially constructed meanings. The researcher looks for patterns of interaction between group members, and how they constitute meaning and regulate group and individual behavior (Putnam, 1983). In this study, the researcher sought to describe the phenomenon of leadership development, as

experienced by employees of a high-performing public relations agency. The researcher and respondents have varied understandings, based on backgrounds and other factors. Through interaction and interpretations, a mutual understanding of the phenomenon of leadership development was developed (Wojnar & Swanson, 2007). This process involved discussing with each respondent specific workday examples illustrating leadership or leadership development, either observed by the researcher or not, then comparing the responses of respondents to identify, and subsequently validate, over-arching themes and patterns.<sup>1</sup>

### ***Coding Process***

First, field notes and interview transcripts were reviewed separately, using open and axial coding processes (Strauss & Corbin, 1998). Open coding helped identify dominant themes; axial coding on subsequent review helped identify specific examples illustrating each dominant theme.

Interview transcripts were read and analyzed individually first, then as a group. The goal was to identify the narrative of each specific group member, before comparing narratives across all transcripts (Chase, 2005).

Finally, the emerging themes and narratives from the field notes and interview transcripts were cross-analyzed and compared as a collective whole. A selective coding process was used to help identify the ways in which dominant themes relate, or do not relate to, to the work experience and psychological safety models proposed by Tesluk and Jacobs (1988) and Edmonson (1999), respectively.

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<sup>1</sup> The respondents' examples that could be shared within this dissertation were limited by the confidentiality standards of the Institutional Review Board at the University of North Carolina at Chapel Hill, as well as a separate confidentiality agreement established between the research site (i.e. Padilla Speer Beardsley) and the researcher. No information could be disclosed that would identify individual employees, the agency's clients, and/or projects being managed on behalf of the agency's clients.



## ***Validity***

An interpretive study, such as this field investigation within a high-performing public relations agency, is not necessarily a reflection of an objective reality. Rather, an interpretive study results in a reality shaped by researcher and subject, and defined by the space between the self of the researcher and the world of the person being research (Saukko, 2000).

In order to better understand the respondents' everyday reality, rather than the temporary reality created by the researcher's presence, validity checks are important. Such measures allow a researcher to verify whether observations and interpretations are consistent with respondents' experiences and perspectives (Daymon & Holloway, 2002). For this study, field notes were cross-analyzed with interview transcripts, and initial conclusions were checked with participants.

## ***Limitations***

### **Site-specific findings**

A qualitative case study of this nature focuses, by necessity, on a specific organization. As such, the findings from such fieldwork cannot be generalized to the industry as a whole or even to organizations that may be similar to the one studied (Van Ruler et al., 2008). Still, a case study can provide deep insight into a specific situation where a certain phenomenon occurs. Replication of the study may help identify consistent themes and patterns, from which a viable model or index may emerge for further examination, including quantitative means. For the stream of research initiated by this dissertation, further examination might include replication of field research with other high-performing agencies in the United States or abroad, then building and testing a model of leadership development based upon an index of variables surfaced through field research. Such testing might involve surveys of agency professionals.

## Reflexivity

In conducting qualitative inquiry, it is important for the researcher to be mindful of how the interactive process of such research might affect interpretation (Creswell, 2003). The participant-observation period of this study involved my functioning as a part-time employee within the agency, while simultaneously recording observations of workplace events.

I brought 20 years of professional experience in public relations to this study, including entry-level work as an account assistant and, most recently, a leadership role as strategic director of a regional agency. This “agency experience” provided a degree of credibility and helped me acclimate quickly with the agency staff.

In the years between my agency roles, I worked for a series of large corporations, during which time I served in management roles and contracted public relations agencies for support. At times during the field research, I found myself distracted by the question of how well clients were being served by the agency. I made a conscious effort to stay focused on the interactions and experiences happening with the workplace setting, rather than client outcomes and client satisfaction.

## Resources

This study was designed to fulfill the dissertation requirements for a doctoral degree. As such, the researcher had limited time and money available to conduct field research. A single-site case study was the most feasible approach for exploratory research of this sort. The case study may be replicated multiple times, through which a robust model of public relations agency experience can be developed. Using this model, an index of variables can subsequently be identified and studied through quantitative research, including practitioner and agency surveys.

In this way, the research stream can evolve over time from mere descriptive analysis to more-insightful prescriptive analysis.

### **Summary**

Case studies, such as the one resulting from this dissertation, can be an effective means of analyzing an organizational situation and drawing helpful insights (Morgan, 1997). This particular study builds upon existing knowledge in public relations, leadership process, and organizational behavior to define an ‘agency experience’ model of leadership development within the public relations field. This integrated theoretical framework allows an examination of real-life public relations leadership development from organizational and individual perspectives, as well as through the interaction of individuals with one another.

Data are collected through participant-observation and semi-structured interviews. Analysis yields a descriptive framework of the public relations agency experience model that will help provide the foundation from which prescriptive analysis can begin.

## **CHAPTER 4: FINDINGS**

This chapter summarizes findings from studying leadership and leadership development within a high-performing public relations agency. Data were gathered through semi-structured interviews and participant-observation, as well as a review of organizational information, primarily the agency's website and marketing materials. Primary findings were derived through a coding methodology developed by Strauss and Corbin (1988) and commonly accepted as a way to identify meaning in qualitative research. This methodology involved open and axial coding of field notes and interview content, which I transcribed myself from digital recordings in order to better appreciate and understand the unique voices of the respondents. Open coding helped identify dominant themes; axial coding on subsequent review helped identify specific examples representative of each major theme. Field notes were coded first, followed by interview transcripts.

This chapter consists of five sections. The first section provides an overview of the research participants – that is, the public relations agency as a whole, as well as the individual professionals working within the agency who consented to involvement in the study. The second section provides an overview of the field research, specifically the research site, research participants, participant-observation periods and interviews. The third section identifies themes about leadership competencies that emerged during the open coding process, and specific examples illustrating each theme, which emerged during the axial coding process. The fourth section of this chapter describes a process model of leadership within the public relations agency environment, based on the initial findings gleaned from the coding processes, with an eye toward

the ways in which leadership development might be fostered. The final section summarizes respondents' perceptions of how leadership development happens within the agency, specifically through their day-to-day work experiences.

The findings contained in this chapter cannot be generalized to the public relations industry in America. However, they provide a baseline understanding of what agency experience means for those working within one high-performing public relations agency setting. This baseline understanding forms the basis of the leadership model described toward the end of this chapter, which is analyzed further within Chapter 5. Comparing this model to respondents' perceptions of work experience and leadership development helps put the findings from this chapter in perspective. It also helps set the stage for further testing of the model within other agencies, as well as within the public relations departments of other organizations, such as corporations, nonprofits, and government agencies.

### **Overview of Field Research**

In October and November of 2010, I conducted three weeks of participant observation and semi-structured interviews within the headquarters of Padilla Speer Beardsley in Minneapolis, Minn. Agency employees were notified in advance that I would be on-site conducting academic research, but they did not know the specific intent of my research nor my observation protocol. This section of the dissertation describes the participating organization and individual participants in greater detail. First, however, I share how I became acclimated to the research setting.

### ***Researcher Acclimation***

Upon my arrival at Padilla Speer Beardsley headquarters, I went through several hours of orientation, just like any new employee of the firm would experience. This included overviews of the agency's mission and values<sup>2</sup>; company policies, including special emphasis on harassment, technology, and dress code; and employee benefits, which include an employee stock ownership plan. The orientation also involved a tour of the entire building, with stops along the way for me to be informally introduced to members of various account teams, as well as senior leaders of the firm.

Immediately following orientation, I took my place in a designated cubicle, alongside several account teams, and was treated like a typical, full-time employee for the duration of my stay. Within three days, I was recognizing employees by name and being recognized by others by name; day four was the last time I had to introduce myself to any colleagues within the agency. My presence as a participant-observer seems to have normalized by that point.

During my time at Padilla Speer Beardsley, I attended internal meetings and client-focused meetings, and in the time between meetings, I worked from my cubicle while making notes about behaviors and interactions happening within my sight. Most of the agency's client work at the time was of a highly proprietary nature or too industry-specific, technically speaking, for me to be of assistance. However, I did make some contributions, mostly by providing my opinion when solicited for feedback about possible approaches to certain projects or challenges.

Beyond attending planned meetings and taking part in, or observing less-formal interactions, I also kept in touch with the happenings of the agency by periodically checking in

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<sup>2</sup> The agency's stated values are: be our best, act with integrity and respect, keep learning, lead clients and deliver results. The new employee orientation process begins with a review of these values, and an insert containing details about each value is the lead component in the new employee orientation packet. In addition, the values are featured prominently on the wall in the agency's main reception area.

with my assigned supervisor, and by making a point of passing through the lobby several times per day and striking up casual conversation with the receptionists and/or the visitors waiting for their appointments. I strived to maintain a consistent schedule, typically working from 9 a.m. to noon, taking an hour-long break offsite for lunch, then concluding the workday from 1 p.m. to 4 p.m. My name and phone extension were listed on the company directory, and my cubicle had a personalized nameplate. Throughout my time at Padilla Speer Beardsley, I felt welcome and became friendly and familiar with many colleagues.

### ***Participants***

The participants for this study were institutional and individual. From an institutional perspective, a public relations agency was the participating organization serving as the research site. From the individual perspective, employees of the agency served as participants in the study, sometimes as objects of observation and other times as respondents in one-on-one interviews. Both the participating organization and the participating individuals are described in this section of the chapter.

#### **Participating Organization**

Padilla Speer Beardsley, Inc., has been in operation for 50 years. The heart of today's firm was established in 1961 as Padilla and Speer, Inc. The current iteration of the agency was formed in 1987 with the merger of Padilla and Speer, Inc., and Brum & Anderson Public Relations, Inc.

As of the most current reporting period, Padilla Speer Beardsley ranks 13<sup>th</sup> among the 139 independently owned public relations agencies in the United States (see Table 4.1), based on self-reported financials, with nearly \$15.2 million in revenue in 2009 (*PR Week*, 2009). By comparison, Edelman – the largest agency in these rankings – reported \$288.5 million in revenue

in 2009. In terms of efficiency, or revenue per employee, Padilla Speer Beardsley functioned about average for the top 100 independently owned agencies analyzed. Padilla Speer Beardsley reported \$145,583 in revenue per employee for the five-year period of 2005 through 2009, while the average for the top 100 agencies during this time was \$156,289. That places Padilla Speer Beardsley slightly below the statistical average among the highest-producing agencies; however, considering all 100 agencies, the firm’s efficiency ranks 34<sup>th</sup> out of 100, placing it within the top third.

**Table 4.1 Efficiency of Padilla Speer Beardsley, 2005-2009, Among 100 Largest Independently-Owned Public Relations Agencies in the U.S.**

Rank	Agency Name	Average Efficiency (Revenue/Employee) , 2005-2009
1.	Qorvis	\$328,777
2.	Davies	\$268,244
3.	Cooney/Waters	\$265,257
4.	APCO Worldwide	\$230,350
5.	Rasky Baerlein	\$221,550
6.	Spring O’Brien	\$215,158
7.	Ruder Finn	\$204,934
8.	Martino Flynn	\$197,383
9.	Taylor	\$197,001
10.	Makovsky	\$189,127
	<b><i>Average</i></b>	<b><i>\$156,289</i></b>
34.	Padilla Speer Beardsley	\$145,583

Padilla Speer Beardsley “provides organizations – from Fortune 500s to startups to nonprofits – with end-to-end communication solutions to help them achieve their business goals” (Padilla Speer Beardsley, 2011). In a nod to digital media and media convergence, the firm boasts via its website that it knows “how to navigate today’s multi-channel media landscape.” Padilla Speer Beardsley is “grounded in corporate communications, fluent in investor relations,



and accomplished in consumer and B2B (business-to-business) marketing” with specialized expertise “in research, creative communications and everything new media.”

Clients of Padilla Speer Beardsley, as noted on the agency’s website, include 3M, General Mills, Microsoft, and Rockwell Automation, among many others. The most common entry points for new clients are corporate/investor relations or marketing communications. As a founding partner of the Worldcom Public Relations Group, Padilla Speer Beardsley also provides access to global support, with more than 100 partner firms located across six continents.

Minneapolis serves as the headquarters for Padilla Speer Beardsley; a second office in New York City serves primarily East Coast clients and provides mainly media relations expertise. In addition to being divided geographically, Padilla Speer Beardsley is also segmented internally into a number of specialty practice areas. These groups are individual disciplines which, as noted in the new employee orientation packet, collectively constitute what is commonly known as public relations. Notably, the agency dropped “Public Relations” from its title in 2002. “Marketing Communications” was used as a descriptor for a brief time, but now the agency is migrating to the descriptive phrase “Integrated Communications.” The phrase “integrated communications” reflects the formation of an in-house creative services function within the agency, as well as the continued development of expertise in digital media, including Web development and social media

Each practice group within Padilla Speer Beardsley is responsible for specific tasks and clients. However, as stated in the new employee orientation process and packet, “most employees do not spend 100 percent of their time in any one area.”

## Participating Individuals

During the field research period in the fall of 2010, Padilla Speer Beardsley had 119 full-time employees. Twenty-eight of these employees consented to one-on-one interviews for this project, while a slightly larger number agreed to being observed during the course of the workday, most often in formal or informal meetings since the nature of this study was a focus on leadership and leadership development as processes.

More than 75 percent of Padilla Speer Beardsley employees in October and November 2010 were female. The group at the time was not particularly diverse; in fact, fewer than five percent of employees represented an ethnic minority. An employee recruitment program may explain some of this ethnocentricity; on average, half of new hires come on referral from current employees. Regardless, it is important to note that recruiting people of diverse ethnic backgrounds to work in the public relations industry is a nationwide issue. Agency settings seem to pose a particular challenge. A national survey confirms that public relations practitioners within corporate settings are more satisfied with the level of diversity on staff than their peers who work in agency environments (*PR Week Diversity Survey*, 2009).

Positions at Padilla Speer Beardsley are divided into administrative staff and account personnel, though responsibilities often cross these lines (see Table 4.2). Teamwork is emphasized during new employee orientation.

On the account side, full-time positions at Padilla Speer Beardsley, in ascending order of responsibility, include assistant account executive (AAE), account executive (AE), senior account executive (SAE), and account supervisor (AS). Employees in these positions have industry experience that ranges from slightly more than one year to roughly 11 years. Those in the AS position serve as the first level of formal management within the agency; they have all of

the typical responsibilities of a manager, except for compensation-related matters. In addition, there are vice presidents (VP) and senior vice presidents (SVP), who guide new business development, supervise client activities, and manage account groups. There is an officer in charge for every account; this VP or SVP reviews strategic plans, key messages, design concepts, and so on, serving as the final point of review before the client sees any of the agency's work.

**Table 4.2 Responsibilities and Average Years of Experience for Account Service Roles within Padilla Speer Beardsley**

<b>Title</b>	<b>Responsibilities</b>	<b>Average Years of Industry Experience</b>
<b>AAE</b>	<b>Assistant Account Executive:</b> Entry-level position. Compiles and verifies media lists. Writes some releases and byline pieces. Conducts a substantial amount of research and background work. Provides general assistance and support for an account group.	1.1 years
<b>AE</b>	<b>Account Executive:</b> Manage more media relations and larger projects than AAEs. Also responsible for a fair amount of research, mainly for new business development.	3.6 years
<b>SAE</b>	<b>Senior Account Executive:</b> Responsible for a large amount of project management. Essential in the drafting of project plans and new business proposals.	6.0 years
<b>AS</b>	<b>Account Supervisor:</b> Similar duties as SAE with additional responsibility as first line of formal management within the agency.	11.0 years
<b>VP</b>	<b>Vice President and Senior Vice President:</b> Larger responsibility for bringing in new business. Supervise all client activities and manage account groups.	N/A
<b>SVP</b>		

On the administrative side, positions vary. The most-common role in administration is that of group administrator (GA), or a person who provides day-to-day support to account teams. This can include a range of tasks such as scheduling, proofreading, organizing, and so on. Other

positions within administration focus on areas such as human resources, technology, and accounting, as well as planning and catering for internal and external events.

Regarding team structure, account teams are generally led by an AS or, in some cases, a VP or SVP. SAEs and AEs take direction from an AS or more senior leader, and handle most of the overall project management. AAEs may take direction from anyone from a higher level, but typically the day-to-day direction comes from an AS, SAE, or AE. Formal reporting structures vary; as noted earlier, AS is the first line of formal management oversight within the agency.

Every employee of Padilla Speer Beardsley receives a professional development budget. Additionally, the PSB Postgrad program – a seven-week series of lunchtime learning sessions – is required for all new hires at the AAE through SAE level, and optional for new hires at the AS level. The program has been in place for 20 years. Sessions are designed to educate new employees how to survive in an agency, and in Padilla Speer Beardsley in particular. A common theme is to learn to “work across the pile, not down the pile”; that is, a new employee should learn as quickly as possible how to keep multiple projects moving forward and not get too consumed with any one project in particular. General sessions on adapting to agency work are supplemented with lessons on specialized areas such as media relations, investor relations, and digital media.

In terms of employee retention, the AE population is considered the most vulnerable by the senior leaders of Padilla Speer Beardsley. Employees who leave these roles typically have three to five years of experience and defect from the agency in order to take a corporate position or pursue graduate studies full-time.

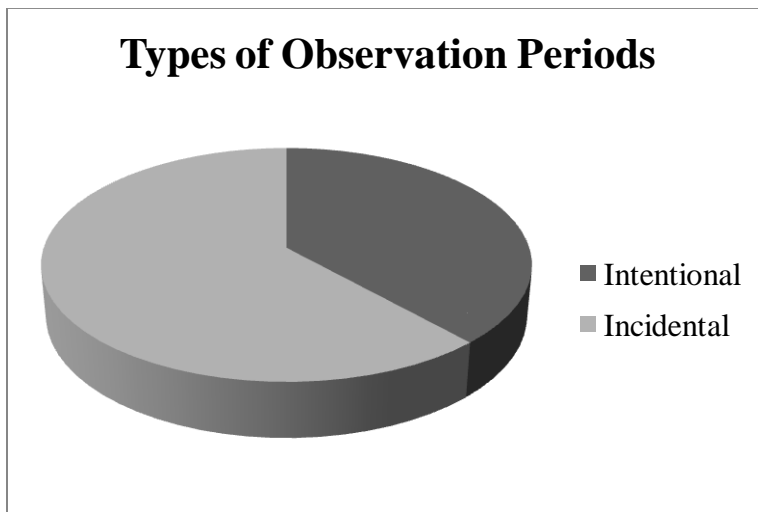
## Overview of Collected Data

During the three weeks of field research conducted in October and November 2010, data were gathered through periods of participant-observation, as well as semi-structured interviews with consenting employees.

### *Observations*

In total, notes were recorded about 34 general periods of observation – 13 intentional and 21 incidental – during the three weeks of field research (see Figure 4.1). These observations encompassed 95 distinct interactions between formal leaders (those at the AS level and above) and non-managers (those at the SAE level and below).

**Figure 4.1 Observation Periods**



The 13 intentional periods of observation refer to planned meetings within the agency. In these settings, particular attention was paid to interactions between those who are formal leaders (i.e. AS and above) and those who do not have management responsibility (i.e. SAE and below). All told, 107 people were involved in these interactions. Excluding two of the planned meetings, one of which was a quarterly all-employee town hall and another which was a professional development workshop, the average planned meeting had seven participants, with meetings of

this nature ranging in size from three employees to 12 employees. Across these meetings, 74 pertinent interactions were identified and noted. On average, each planned meeting yielded field notes on six pertinent interactions between senior leaders and those without management responsibility. Most meetings lasted at least 30 minutes yet rarely longer than 60 minutes.

The remaining 21 observations were incidental, meaning they involved unplanned discussions or impromptu meetings within the cubicle environment, hallways, or other open areas within the agency. These observed incidents involved every level of personnel within the agency, from intern to chief executive officer. As with intentional observations, particular attention was paid to incidental interactions between those who are formal leaders (i.e. AS and above) and those who do not have management responsibility (i.e. SAE and below).

Collectively, 44 people were observed through incidental means. The typical incidental interaction involved two people and, with one exception, never involved more than three people. Incidents included face-to-face interactions as well as phone conversations. In the case of phone conversations, it was often obvious from the tone and content whether the person on the other end of the line was a peer, a supervisor, or a client. Conversations with colleagues were typically less-formal and more-pointed than conversations with clients; moreover, conversations with colleagues often included mention of a client by name or by simply using the phrase “the client” or something similar to that during the course of discussion. While none of the incidental interactions were formally timed, most of these discussions lasted a few minutes and rarely longer than 10 minutes.

### ***Interviews***

Semi-structured interviews were conducted with 28 agency employees, ranging from AAEs to SVPs. All agency employees were offered the opportunity to participate; the

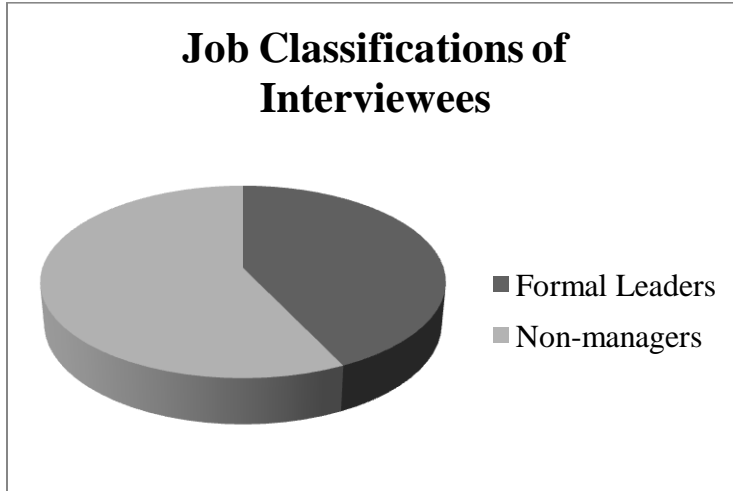
participating respondents voluntarily consented to being interviewed. The interviews ranged from 16 minutes to 38 minutes, with the average interview lasting 23 minutes.

Twenty-four of the interviews were with female employees, over-representing the total population of female employees by approximately 10 percent. The remaining four interviews were with male employees. All interviewees were Caucasian.

Among the 28 employees interviewed, 12 were in formal leadership roles – that is, at the AS level or above (see Figure 4.2). That over-represents the total population of formal leaders by less than 10 percent. Among the 12 formal leaders interviewed, however, 10 were female; that number over-represents the total population of female leaders by 27 percent, perhaps significant enough to have influenced the overall impression. The other 16 interviewees who were not formal leaders were at the SAE level or below, meaning they did not have management responsibility.

The 28 interviewees had accrued, on average, 7.6 years of service with Padilla Speer Beardsley. Tenure ranged from 30 years at the longest, to six months at the shortest. The formal leaders, or those at the AS level and above, had been employed by Padilla Speer Beardsley, on average, 12.3 years. The non-managers, or those at the SAE level or below, had, on average 3.5 years of service with the agency.

**Figure 4.2 Job Classifications of Interviewees**



### **Findings**

#### **Leadership Competencies: Understanding Behaviors That Help Foster a High-performing Public Relations Agency Environment**

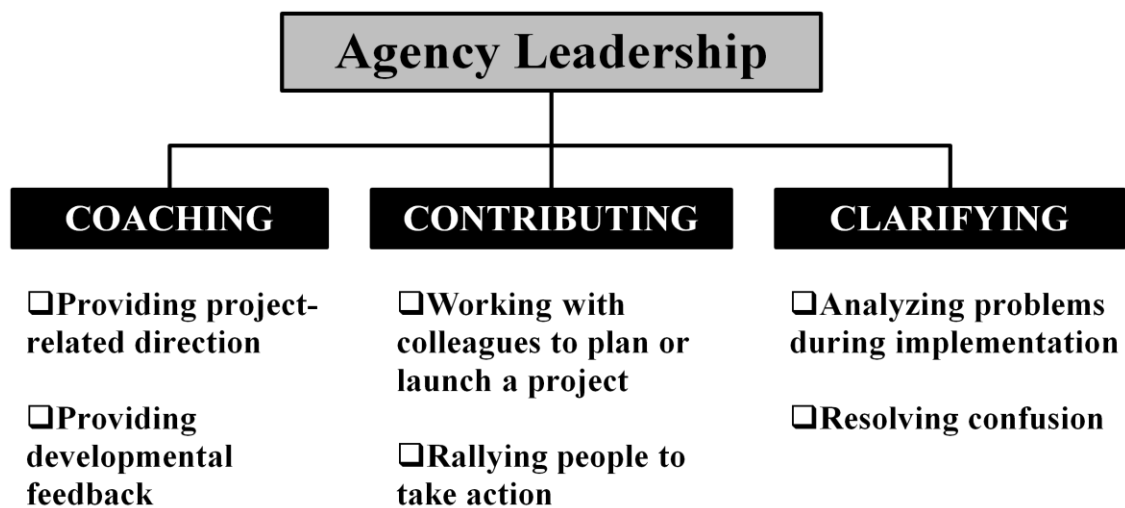
As noted in prior chapters, leadership has largely been viewed by scholars as either a set of competencies evidenced by an individual's behavior, or an interactive process that happens between people with varying degrees of authority and influence. Leadership within the public relations agency environment has not been formally defined, and so this study yielded important insights about leadership competencies and processes from those who were willing to be interviewed and observed.

Before examining leadership processes within the research site and analyzing their possible influence on the development of young professionals, it is necessary to look closely at leadership competencies, or sets of observable behaviors, evident within the agency. Open coding of field notes and interview transcripts from the research site identified three general themes related to leadership competencies displayed by formal leaders within the agency: coaching, contributing, and clarifying (see Figure 4.3). Coaching consisted of providing project-



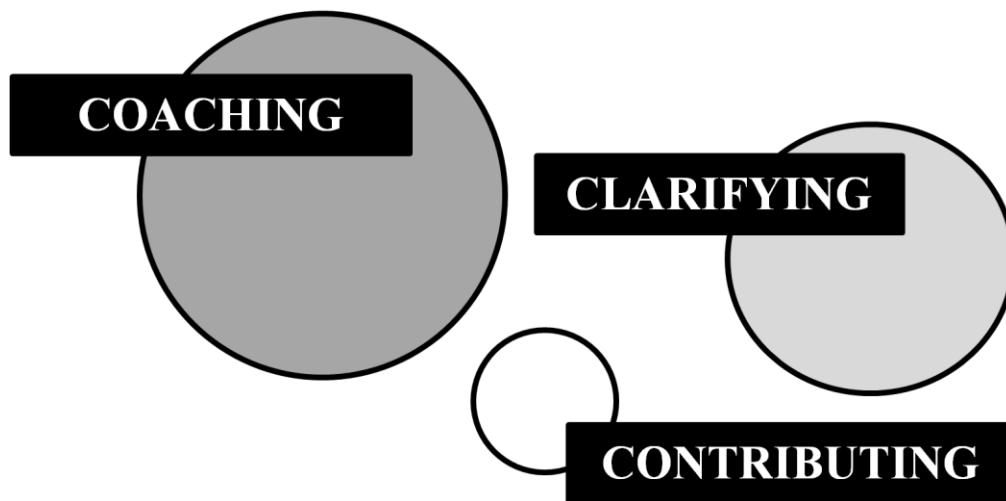
related direction, largely at the start of new projects, or providing developmental feedback, often toward the latter stages of implementation. Contributing involved working directly with non-managers to plan or launch projects, or otherwise actively rallying the team toward action, usually during the implementation of projects. Clarifying was specific to analyzing problems an individual or team had encountered, or resolving confusion related to projects that were already in motion.

**Figure 4.3 Coding Diagram**



The three leadership themes were not equally evident (see Figure 4.4). Coaching was the dominant theme evident in more than half of the 95 distinct interactions observed between formal leaders (those at the AS level and above) and non-managers (those at the SAE level and below). Providing clarification during the implementation phase of a project was the focus of nearly one-third of interactions, while actively contributing to projects was apparent in only about one-fifth of interactions between formal leaders and non-managers. These three leadership themes are described, using respondents' words, as well as descriptions of observed behaviors, in the following pages.

**Figure 4.4 Relative Weighting of Leadership Themes**



### ***Coaching***

Coaching was exemplified by formal leaders at Padilla Speer Beardsley in two ways: providing direction regarding new projects and related tasks, or providing developmental feedback, largely on a one-on-one basis. Coaching was evident in more than half of the 95 distinct interactions observed between formal leaders (those at the AS level and above) and non-managers (those at the SAE level and below).

#### **Providing project-related direction**

Formal leaders at Padilla Speer Beardsley play a strong hand in how account teams develop strategies. The direction they provide tends to focus on clients' long-term goals, and how new work that is getting underway fits within a broader framework. In several internal account team meetings, for example, the SVP or AS leading the meeting reviewed year-to-date progress and re-stated client goals for the year, so that the team meeting did not lose sight of the forest for the trees. One of the formal managers went so far as to host a lunch-and-learn session with a client, so that the team could better understand and support the client's long-term objectives.

Providing clear direction is not the same as hand-holding, though, at least according to most of the formal managers interviewed. Formal leaders expect non-managers to take ownership of their tasks and responsibilities, seeking clarification and feedback as necessary. As one AS explained:

“Junior employees learn through trial-and-error. My expectation is that people are going to make mistakes and take the time to understand those mistakes, so that they can avoid them in the future. Part of our job (as leaders) is to provide people with specific direction and not be vague. Just coming into this profession there’s a lot that you don’t know. Their job is to ask a lot of questions, follow-through on the direction we have provided to them, and constantly ask for new and different projects, making themselves available to people so that they can get a broad range of experience.”

Providing project-related direction happened in multiple ways during the research period, and did, indeed, often happen in an interactive manner. In an internal meeting, for example, an AS advised the team to be diligent about record-keeping that might be necessary for auditing purposes down the road. The AS also asked the team for input on how to most efficiently maintain such records and verbally filtered these best practices during the course of the meeting, so that the team was clear on expectations.

Subsequent actions stemming from a project kick-off meeting often reflected just how influential a formal leader’s direction could be. One AE, after talking with an AS about a new social media initiative, called a client to explain why the content would need to be more specific than past projects of a different nature. The AE, following the advice of the AS, made reference several times to the client about agreed-upon, over-arching strategies that had been put into place, dictating a robust approach to social media.

Employees at the non-manager level talked at length about working with multiple formal leaders, and feeling empowered by this experience. One AAE put it into these words:

“One thing I love about Padilla is you don’t necessarily feel the hierarchy that some companies might have. All of the senior level people are very approachable. If I have questions or anything like that, then I have no problem going to them.”

An AE described the empowerment and growth this way:

“I’ve learned my role through exposure to the leaders here. It’s a real mix of different people. I’ve had the same manager for a few years, but it’s not like I work for just that one person. I’m exposed to many different folks. I mean, the size and the different types of groups we have, it’s not as though you’re put in a box and that’s what your role is, and that’s it. There’s constant growth.”

Both formal leaders and non-managers acknowledged this sense of empowerment and access, as it relates to daily work and how the agency functions. Clear direction at the outset of a project or initiative seems to help put non-managers on the right path. That does not mean, however, that all projects proceed seamlessly. In the words of one VP:

“Because people here do feel emboldened, they’re not as cognizant of the chain-of-command or of protocol in dealing with clients and sometimes that can get kind of sticky. I will occasionally have to do damage control, because somebody stepped outside of the chain-of-command. But that’s typical of any organization where you have a pool of young talent. You’re always going to find that. I don’t find that as a game-stopper. I see it as something you always have to be cognizant of.”

Within this research site, formal leaders helped non-managers develop long-term strategies and maintain focus on client’s long-term goals. Non-managers are expected to take ownership of their tasks and responsibilities, yet formal leaders are open and willing to providing them with important developmental feedback.

### Providing developmental feedback

Padilla Speer Beardsley is an environment rich in developmental feedback. Formal leaders play a particularly strong role in this process, providing individualized feedback on a one-on-one basis or providing targeted feedback to individuals within a group meeting or other team setting. For example, in a weekly account team meeting, an SVP praised an AAE for

garnering media coverage on behalf of a client, despite the client being somewhat challenging and difficult to work with on the given initiative. On another day, an AS came to an AAE's cubicle to provide feedback in person. The AS suggested a few edits to a piece of writing but emphasized several times that, aside from the few minor errors, the AAE's work was "otherwise perfect."

Expectations are high at Padilla Speer Beardsley, a sentiment voiced by most of the formal leaders and non-managers interviewed. This seems to have some impact on the process of developmental feedback. As one SAE explained:

"Some people are very good about spending 5-10 minutes with you on a writing assignment, and explaining why they made edits. Other people won't do that, and you'll never see the document again. Most people are very good, though. Normally, we have to ask (for feedback), but they will spend time and explain. There are very high expectations of how we perform, though. Usually, when you are sending a document to a higher-up for review, it's very rare that you would get that back with any corrections on grammar or punctuation or spelling. If I sent a document to my supervisor with grammatical errors, she wouldn't like that. You would never send something like that to your supervisor. There is a very high expectation that what you send to someone above you is as polished and buttoned-up as it would be for a client."

Despite such a high bar for performance, most non-managers feel feedback is available to them. One AAE, for example, discussed feeling "...really lucky because my supervisor is so open to being asked for feedback. I can ask what's going on and do so face-to-face. It's very open-door in my practice area." This kind of sentiment was consistent among most of the non-managers interviewed for this study.

One AE explained it this way:

"That's something we're really good about here – being direct and open. Where if I did say something on a conference call or in front of a client that might not have been 100 percent, then after the meeting typically either a supervisor or someone else would say, 'I can see where you're coming from, but this is what you might do in the future.' Not that that's happened often, but did happen once or twice, and it was handled right away and I felt respected in the process."

Nearly one-half of non-managers, and nearly all of the AAEs, interviewed for this study mentioned the mentoring process at Padilla Speer Beardsley. As an intern, one's supervisor also acts as mentor. However, if the individual is hired into an AAE role, a new mentor is assigned or the individual can select a mentor. This person is typically someone other than the formal supervisor, a person who can provide objective perspective and feedback. This kind of coaching was not easy to witness during field observations, but coaching of that sort was a recurring theme during one-on-one interviews with research participants.

Of course, not every non-manager feels he or she receives adequate coaching and feedback from formal leaders. This type of concern, when expressed by research participants, often related to how a person was treated on a day-to-day basis, rather than during formal performance reviews. As one AAE explained:

“There are those times when I wish I had more feedback, but you know, I would say there are certain people here who are better at giving it than others. Some people just take what you've given them, and then re-do it if it's not the right way. There are other people who will make you go back four or five times, and give you advice. I like working with the people who make me go back, because it teaches me something.”

By and large, though, evidence indicates that formal leaders within the research site are diligent about providing feedback. They do so for non-managers, as noted, on a one-on-one basis or within the context of group meetings.

### ***Contributing***

Contributing meant formal leaders working directly with colleagues to plan or launch a project, or rallying people to take action. While it is easy to think of a public relations agency as being highly collaborative, the reality is that collaboration happens most often among non-managers, not necessarily with formal leaders. In fact, contributing was apparent in only one of every five interactions involving formal leaders and non-managers. This unique type of

collaboration involving formal leaders – that is, having formal leaders actively contribute to the work process – often revolved around planning or launching a project, or rallying people to take action, according to those interviewed and observed for this study.

#### Working with colleagues to plan or launch a project

Roughly half of the observation periods involved a formal leader and at least two non-managers. In nearly all of these instances, the formal leader actively contributed by helping the non-managers develop new strategies or fine-tune new projects that were just being implemented. For example, an AS met with an SAE and an AAE one morning to work through some concepts to be presented to a client later that day. The SAE and AAE could have done this work on their own, and then brought the final versions to the AS for approval. However, the AS was actively engaged in refining and revising the concepts. It is this type of hands-on involvement early in a project's lifecycle that is most reflective of how a formal leader contributes to daily work at Padilla Speer Beardsley.

In this regard, formal leaders described their role in several different ways – “identifying opportunities,” “championing best practices,” “helping build strategy,” “directing efforts,” and “making sure projects are kicked off appropriately.” As one VP described:

“My role is mainly to act as a strategic adviser to clients. While I don't do much of the day-to-day work anymore, I oversee the accounts. I help the team understand what the client is trying to achieve, as well as what we as a team are trying to accomplish on behalf of the client.”

Those at the non-manager level do believe that formal leaders are accessible and valuable when it comes to new assignments. In fact, one AS believes that is why new employees generally stay. In the words of the AS: “It's beyond the VPs working on this, the AAEs working on that. Titles are less significant here than at other agencies. It is a great learning environment.”

Another AS echoed the commitment to help ensure client work gets off to the right start: “I will have junior staff members pull me in on stuff that they need to get going. They’ll say, ‘Hey, we’re swamped. Can you help?’ So it’s fluid.”

Helping projects get off the ground effectively is only one way that formal leaders contribute to day-to-day work in the agency environment. Those formal leaders observed and interviewed for this study also played an important role during project implementation, by stepping in, as needed, to keep the work on track.

#### Rallying people to take action

The other primary way that formal leaders contribute to daily work within Padilla Speer Beardsley is by rallying people to action. For example, in a planned team meeting about a client-related project, the formal leader distributed updated reports to all employees at the start of the meeting, and asked colleagues to provide immediate feedback on the accuracy of the information. This set a tone of urgency and importance.

In every instance observed of a formal leader contributing to daily work, there was a clear and specific action to be taken by the non-managers present. Those actions included conducting research, compiling reports, contacting news reporters, following up with clients, reaching out to other practice areas, or simply moving forward with a project. Whenever a formal leader was involved in a discussion about active projects, the emphasis was clearly on rallying the team to take action.

Likewise, formal leaders make decisions about who to involve in what meetings and projects, and at what point in that person’s tenure. The leaders interviewed said they generally try to involve new employees in client meetings immediately, though it may take a few months



before the employee can make much of a contribution, especially within the context of a client meeting. As one AS explained:

“If I’m inviting you to a client meeting, it’s not because you’re cute. You’re there because we have a strategy around your being there which is to get you more client time so that they get comfortable being around you. Giving you exposure to what’s being discussed, and encouraging you to talk.”

Another AS described the process this way:

“You know, it’s one thing to be doing all of the administrative stuff like (news) clip tracking, or even pitching stories to editors. But until you can be comfortable sitting in a client meeting and asking a lot of questions, you may never understand what it all really means. I always tell people to ask, ask, ask. You’re new, you’re young, you have the opportunity to ask clients questions. They’re going to tell you things and may act like you should already know those things. You probably won’t and shouldn’t. Heck, I probably wouldn’t even know the answers. So don’t feel like you can’t ask questions. Part of it is how comfortable people seem in front of clients. It’s getting them comfortable with clients and with taking a project on their own, instead of having someone work with them on it.”

Most of the formal managers talked about an informal agreement among them, that helps facilitate workflow across practice areas and keeps account teams on top of client needs. As one VP said, “We have no solid lines or doorways anywhere, between any of our groups. If you need someone or a skill set, you just go ask.”

As noted, formal leaders coach team members with strategic advice and developmental feedback. Formal leaders also contribute to daily work by helping plan projects and by rallying people to take action. These two aspects of leadership within a high-performing public relations agency are generally distinguishable from the third primary aspect, that of clarifying.

### ***Clarifying***

Clarifying involved formal leaders analyzing problems non-managers or teams had encountered since the launch of a project, or resolving colleagues’ confusion related to active

projects. This leadership behavior was evident in about one-third of interactions involving formal leaders and non-managers.

### Analyzing problems

In planned meetings, an SVP, AS, or even occasionally an SAE was often digging for details from account team members about a certain initiative or issue, then synthesizing these multiple perspectives into a more cohesive understanding of a challenge or opportunity. For example, in one account team meeting, an AS prompted an open exchange of input and feedback about plans for handling a client's media relations and social media uploads during a trade show. Questions were posed about several aspects of these efforts, indicating that the AS wanted to make certain the team would be well-prepared for potential scenarios.

One SVP explained how important it is to be analytical, both as an up-and-comer within the agency, as well as a formal leader whose behavior influences others:

“I have a lot of ideas that go nowhere, but I stick my nose in everything. I don't know if that's just me, but our culture lets us do that. I think it's really hard for a young person to see that, because they say, ‘Well, you're a senior vice president.’ But I've been doing that since I first came here, and I'm no worse for the wear. I joined the firm years ago, and what I tell young people when I interview them is that the reason I'm still here is because I've raised my hand and politely disagreed with an idea or cited a problem and posed an alternative solution.”

Indeed, inquisition and analysis by formal leaders happened frequently in incidental interactions, often when a non-manager sought advice or feedback from a formal leader, such as an AS. One morning, for example, an AAE asked an AS to help interpret a message sent via e-mail to the AAE by the client. Before providing direction, the AS asked several clarifying questions of the AAE, as well as the SAE.

One SVP summarized the agency's commitment to problem resolution this way:

“We do very good work, and our clients recognize that, and that's part of what keeps people here. They see that we care about the clients. This place is incredibly honest, with high ethics and integrity. Not every agency is like that. We trust each other here. We do the right thing by the client. We don't pad fees. None of that. There is no encouragement to do anything to make the numbers look better. I think our clients, and the people who work here, truly appreciate that.”

Formal leaders bring clarity to daily work at an agency by analyzing problems and shedding light on possible solutions. In a similar fashion, leaders work to alleviate the confusion that inevitably happens with projects involving so many people and so many moving parts.

### Resolving confusion

The second important way formal leaders help clarify matters for non-managers is to resolve confusion. For example, in an impromptu meeting in the hallway, a leader listened intently as an SAE shared concerns from a client regarding a message strategy for a media relations initiative. The leader acknowledged the SAE's frustration, but also tried to help the SAE understand the client's perspective. The leader also provided another perspective on the situation, which in turn helped the SAE realize the concern could be easily and quickly resolved.

One AS described her involvement in resolving confusion this way:

“I basically make sure that the communication plans we put together are completed and that we fully worked the plan. That the client is happy. That the team is working well and at the level they should be working. That the budgets are clear and that we're working to the budgets. If there's a client-related issue that needs clarification, I have an open-door policy. The members of my teams stop in as needed; in fact, they're probably in my office right now.”

It's not always the non-managers coming to the formal leaders for clarification, though. Sometimes it's the formal leaders coming to the non-managers. One afternoon, a leader came to an AAE's cubicle to acknowledge and explain a potentially confusing e-mail message from a

client. The leader did so by proactively sharing some information with the assistant account executive while simultaneously gathering additional information from that individual.

In similar fashion, an AS stopped by an AAE's cubicle to discuss some client confusion regarding a document the AAE had prepared for the client. The AS maintained a positive, encouraging tone, and helped the AAE by providing specific suggestions on how such problems might be avoided in the future.

Resolving confusion was not just an incidental occurrence. For example, in a planned meeting to transfer some responsibilities from one colleague to another, the leader made a point of restating what both colleagues were saying, at points clearly resolving some confusion that had existed. Likewise, another leader summarized what each colleague said during a weekly account team meeting before the leader said anything in response or asked other colleagues for input.

Viewed holistically, leadership within a high-performing public relations agency is exemplified by coaching teams and individuals, by contributing to daily work in unique ways, and by clarifying issues when they arise. These competencies form a rudimentary indication of the kind of expertise and influence one might gain by working in an agency setting. However, it is first important to examine how these three competencies relate to one another, as part of the larger process of agency experience.

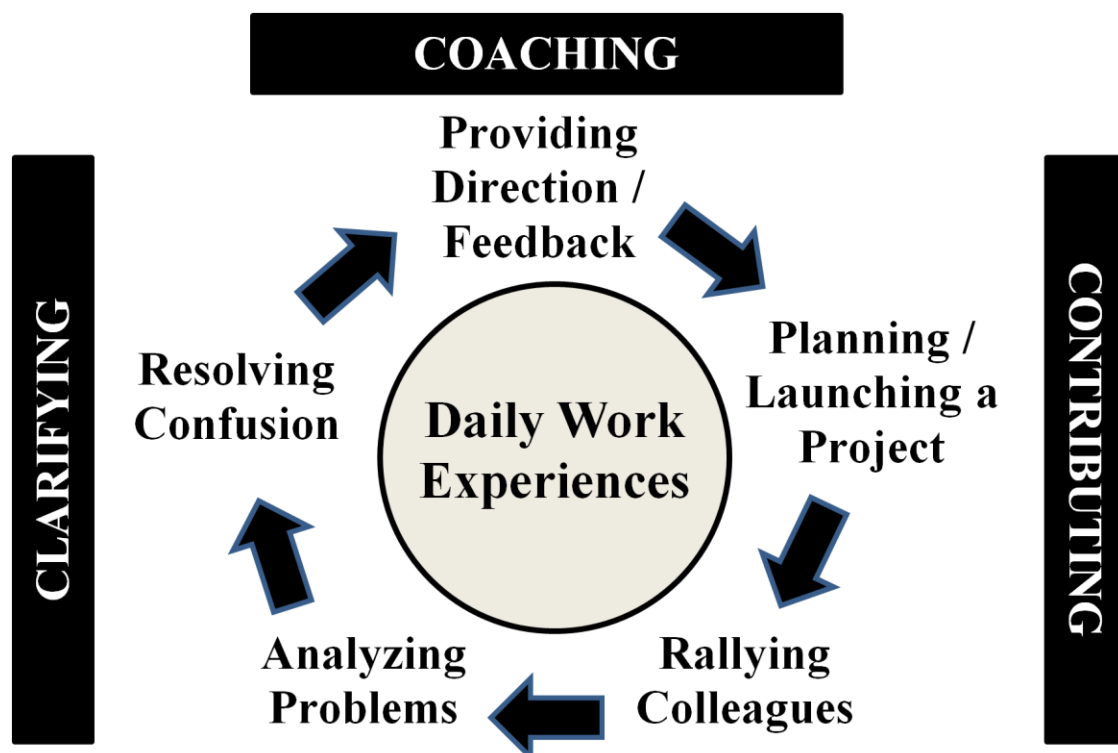
### **Putting Competencies to Work: The Process of Leadership within a High-performing Agency**

The competencies of coaching, contributing, and clarifying may be viewed, collectively, as the process by which the executives and managers of a high-performing public relations

agency demonstrate leadership (see Figure 4.5). This process is constantly in motion, and an executive or manager may jump in or out of the process at any time, and as needed.

Moreover, the leadership process within a high-performing agency is not necessarily linear, based on what was observed during the field research. A high-performing agency is not micro-managed. In fact, and as noted earlier in this chapter, people at all levels of the organization feel empowered. Leadership, then, is less about controlling workers' actions and more about helping workers stay on track and moving toward desired outcomes. What is perhaps most important to note is that non-managers at Padilla Speer Beardsley reported gaining important development feedback from every step of the process, meaning virtually any interaction with a formal leader at any point in the cycle of daily work experiences can leave a meaningful impression upon the less-experienced professional.

**Figure 4.5 Leadership Process within a High-performing Agency**



During my time at Padilla Speer Beardsley, I paid attention to the dynamics of day-to-day work while identifying aspects of the leadership model. The work process was team-oriented, situational, self-motivated, and inclusive. This section of the chapter examines these perceptions. As appropriate, notes from field observations are supported by verbatim, unprompted comments about the leadership process, gleaned during one-on-one interviews with agency employees.

### ***Team-oriented***

At Padilla Speer Beardsley, there can be no debate that work is team-oriented. Multiple account teams work daily on dozens of client projects and initiatives. Effectiveness is measured through the progress made toward the client's objectives, as well as the overall efficiency with which the work is delivered.

One SVP described the team-oriented nature of the agency in these words:

“Most people work within a team, on a day-to-day basis. Everyone has their own tasks, but they cross over or coordinate with other people on the team. It's very collaborative. We have a lot of touch points. We talk to each other a lot. I think there's a good sense that everybody wants to make the team as a whole stronger. We provide a lot of feedback to each other so we can move, as a group, to a higher level where we're providing even better client service.”

In all but a handful of observed interactions, leaders consistently focused on team effectiveness and the achievement of client's goals. Conversations and meetings may have been about specific tasks or challenges, but the bottom line was always results. In fact, the leader often explicitly re-directed conversation from the problems at hand to the results that were desired down the road. One afternoon, for example, an SVP came to an AAE's cubicle and asked for a status update on a news release. The AAE provided the SVP with a brief update. Then the SVP re-focused the conversation on why this particular news release was so important, in the context

of the client's overall media relations program. The SVP asked what help or guidance, if any, was needed from the SVP or others, in order for the AAE to quickly and successfully complete the task. As one AS remarked in a one-on-one interview: "We have had many clients for a really long time. There's a strong focus on client satisfaction and making sure that clients are happy."

The work within a high-performing agency is, indeed, highly team-oriented. Still, as noted, the true emphasis is on client outcomes and results. To that end, it is important to understand the other dimensions of leadership, especially the situational nature of agency work.

### *Situational*

At Padilla Speer Beardsley, leadership focuses largely on situations. Multiple account teams and job titles with fluid responsibilities result in unique situations that must be addressed each day. Nearly every incidental observation, and most of the intention observations, were situational in nature – that is, formal leaders and non-managers were discussing or addressing specific situations arising from client work. Moreover, among the non-managers, it was rare that more than an hour passed without some sort of unplanned situation, issue, or incident, even if it was simply unexpected feedback or an unexpected request from a colleague, client, or member of the news media. These interruptions often, though certainly not always, involved some sort of intervention by a formal leader, be that a direct supervisor or an informal mentor.

One AS explained the intervention process in these words:

"I'll give direction at the beginning – here are your resources, here's some background information so that you're a little more comfortable. Let's talk through this, and then you can take it from there. If you want, I can work with you at certain points, or you can just run with it. Whatever somebody's comfortable with. Usually, we'll talk through feedback as the project moves along, and as necessary. I'll try to set up different stages and markers throughout (the life of a project) to make sure we connect and talk, but sometimes it's just on the fly. When they get to the end of a project is not the time to tell them things got off-track."

It is important to remember that a public relations agency is fundamentally a client service operation. While the agency can and often does play a strong hand in strategic development, the day-to-day value of an agency is the operational support provided for media relations and other tactical public relations efforts. In this way, it is not unexpected that situations often arise throughout the work day at a high-performing public relations agency. In fact, it is likely because Padilla Speer Beardsley can and does handle such situations expertly that the agency has performed strongly and steadily amidst significant economic challenges and dramatic technological advancements across the U.S. and around the world since 2005.

Most situations at Padilla Speer Beardsley seem to be resolved in a supportive fashion, particularly when AAEs or AEs are involved. There is a clear focus on understanding the needs of the person handling the situation, and helping the person feel good about bringing the situation to closure. Some situations are met with a more directive leadership style, in which the formal leader simply tells the non-manager what to do and does not really entertain a discussion about the colleague's needs or concerns. However, this seemed evident only when more-experienced non-managers were involved. In the words of one AS:

"I'm not the day-to-day contact for most of my clients. That's usually a level below. I swoop in only as necessary to make sure that things are going along as planned. That the client is happy. That the team is working well and at the level they should be working. Here, we like to empower people to feel like they're in control."

This spirit of empowerment fuels another important dimension of the leadership model within the agency setting – a need for individuals at all levels to be self-motivated.

### ***Self-motivated***

Employees of Padilla Speer Beardsley are expected to be self-starters who inherently understand and value the end game of client satisfaction and account growth. Moreover, most of the non-managers observed at the agency worked autonomously throughout the day, or



collaboratively with a peer or peers, rather than engaging a formal leader or supervisor. The fact that only 21 incidental interactions between formal leaders and non-managers were recorded over the course of three weeks is further evidence of the strong self-motivation among non-managers at Padilla Speer Beardsley. They take charge of their responsibilities.

Certainly, leaders served as role models, or idealized influences, in many observed interactions. Yet, with the exception of an all-staff meeting and an in-house professional development workshop, there was no explicit inspirational motivation in group settings, such as “Keep up the good work” or even “You’re making good progress.” The workflow seemed somewhat clinical, often focusing solely on actions that needed to be taken next, not praise or encouragement in the more traditional sense. Observed conversations throughout the research period almost exclusively focused on meeting clients’ needs and outcomes, rather than motivating the account team.

Conversations with a stronger motivational tone likely take place in more discreet interactions than what could easily be observed. This is to say that Padilla Speer Beardsley aspires to be an inspired, and inspiring, workplace. The agency’s clearly-stated and often-reinforced values include “be our best” and “keep learning.” As well, the agency uses this line in its marketing efforts -- “Something unexpected. No surprises.” – which suggests inspired work. Specifically, Padilla Speer Beardsley strives to deliver innovative ideas and solutions to clients, yet promises to do so in a way that keeps the client fully informed and aware, therefore preventing situations where the client could be caught off-guard.

On a related note, twice each year Padilla Speer Beardsley sponsors an in-house workshop on how to have difficult conversations within the agency regarding sensitive topics. The leaders of the agency wish for there to be “no surprises” among colleagues, just as they wish

for there to be “no surprises” for clients. More than one-half of the employees interviewed for this study mentioned that the “difficult conversations” approach was a meaningful one, helping them compose their thoughts and approach internal colleagues in a respectful yet direct manner.

Self-motivation within the agency environment may be an ideal and necessary complement to the team-oriented, situational nature of the leadership process. Still, with many different personalities, backgrounds, and skills, another essential dimension for leadership seems to be an air of inclusiveness.

### ***Inclusive***

Every AAE who was interviewed mentioned a strong sense of inclusivity within the agency – that “people at all levels, and across levels, work really well together” and that there “aren’t cliques” or “the usual sense of competition” that they believe could be found at other agencies. Padilla Speer Beardsley seems to be a place free of perceived barriers and open to true collaboration.

The leadership process within a high-performing public relations agency was seen as team-oriented, situational, self-motivated, and inclusive. Self-motivated people work as part of teams to address certain situations, maintaining a spirit of inclusion and true collaboration. In fact, collaboration is such an important aspect of agency experience that the next section of this chapter focuses on collaboration within the agency setting and what this means to agency employees, especially non-managers who are learning, by example and experience, what leadership means.

### **Collaboration: Fostering Leadership Development through Daily Interactions**

It has been noted that a unique type of collaboration – that is, formal leaders contributing to daily work – involves the formal leaders helping plan or launch a project, or rallying people to take action. However, that is not to say that this is the dominant type of collaboration within a high-performing agency. In fact, collaboration among non-managers was witnessed on a near-constant basis within the research site, yet rarely involved formal leaders directly. Non-managers shared ideas, reviewed one another's work, discussed problems, brainstormed solutions, and otherwise found strength and support through peer-to-peer collaboration, perhaps fueling their own leadership development in the process.

During the research period, collaboration among non-managers at Padilla Speer Beardsley was exemplified by a team-oriented work structure, as well as individual responsibilities that regularly crossed practice areas and occasionally exceeded one's formal job titles. All of the interviewees work on multiple account teams, and, with only a few exceptions, they work for multiple practice areas or work at least occasionally with people from other practice areas, to meet client needs.

Most of the non-managers within Padilla Speer Beardsley take direction from at least two account supervisors or senior leaders – and in some cases, three or more supervisors or leaders. Additionally, more than half of the AAE's occasionally do work beyond their job title, often involving management of a small account, covering for an AE who is on vacation or leave, or taking on a stretch assignment requiring a new skill.

During the field research at Padilla Speer Beardsley, collaboration was most often – and overwhelmingly – exemplified by the sharing of information between colleagues, most often

among those at the non-manager level. Socializing new employees to their role was another notable form of collaboration, especially for non-managers. These less-experienced professionals also mentioned several aspects of organizational culture – concern for the person, cross-collaboration, and learning and development – as factors that promoted collaboration within the agency, and especially at their level. Each of these concepts is explained in the following pages.

### ***Information-sharing***

More than half of all observed interactions (62 of 107) within the agency focused on the exchange of information necessary for someone to complete or understand a project or situation. Examples are numerous. In a weekly team meeting, an AAE pro-actively shared with colleagues an emerging news story on a public policy issue of potentially significant interest to a particular client, and therefore to the account team. In an impromptu meeting, members of an account team discussed and debated various ways to approach a long-term client about a problem that had been developing. This on-the-spot brainstorm involved everyone sharing what they know about the problem.

Information-sharing can help foster learning and growth. In discussing the open atmosphere and sense of collaborative teamwork at Padilla Speer Beardsley, one AAE explained:

“Each person’s experience is different. So I’m not quite sure that you have to be at an agency before you go corporate. I’m not entirely sure that I would agree that corporate people can’t go agency. But I will say that my experience here has taught me a ton, and that agency experience is really valuable. It has been really valuable to me.”

Another AE described collaboration this way:

“The culture here is inclusivity, and that’s what is expected. That’s something that has helped us come out of the economy and kept our morale high while things were dipping, sort of making sure that everyone felt important in this company, whether new or AAE or AS who was working extra hard. Everyone was being included and supported. We’re still doing that. We put people on our calendars. We send e-mails to all of the staff, even the junior-level. We do a lot of information-sharing.”

Indeed, none of the 28 interviewees made any mention of information-hoarding within the agency, for control, power, or any other reason. This is a telling fact, given the range of tenure and responsibility reflected in the pool of interview respondents.

Much of what happens in an agency, at least between individuals, is about the sharing of information. However, information-sharing is not the sole characteristic of collaboration. How people learn their roles – a process called socialization -- is also important and influential.

### ***Socialization – “hands-on learning”***

Collaboration does not happen instantly; new hires must be oriented to their roles before a level of trust can be established. As it relates to leadership development, how -- and how swiftly and thoroughly -- new employees are indoctrinated to their roles can either fuel or delay their learning and growth. Socialization, or helping someone understand their role within an organization, was evident in slightly more than half of the observed interactions (56 of 107) between leaders and non-managers at Padilla Speer Beardsley. This included planned meetings and incidental interactions.

Employees ranging from SVPs to AAEs generally referred to the socialization process at Padilla Speer Beardsley as trial-and-error, or “being thrown into the work,” “learning by doing,” “following the established best practices,” and “learning from mistakes.” Indeed, new hires must be able to hit the ground running when they join the agency. To be hired into the entry-level AAE role at Padilla Speer Beardsley, a person must have already completed at least two internships directly related to integrated marketing or public relations. One AS explained:

“Here we have a really hands-on learning approach. We bring people into a team, and we try to integrate them very quickly. So they attend all of the meetings. They sit down with people for one-on-ones. They sit in client meetings as quickly as we can have them do that. Some of the things that they do will be non-billable, some will not be visible right away, but we try to integrate them really quickly so they can get up-to-speed

as fast as possible. We want them to understand why they are doing what we're asking them to do, and what impact that has on the rest of the account. Sometimes, some of the things the junior staff do are very critical pieces of work for the account. They may not seem like it on the surface ... but once you understand that, you know why it's important. It not only makes it a more fulfilling activity, but often times they'll also learn it faster and do it better."

Similarly, an SAE emphasized the focus on learning by doing for those who are new to the agency:

"How they learn here is tending to the task at hand and taking the work as far as they can possibly take it before turning it in for review. And giving people ample time to review their work before it's shared with the client."

An assistant account executive echoed similar sentiments, providing additional insight about role socialization and the expectations at Padilla Speer Beardsley:

"I had a couple of jobs in PR before I started working here. But nothing really prepared me for the high level of work that is expected. Coming in, someone would say, 'Do this project,' and I would do what they asked me. But you're not expected to just do the basics. You're expected to go above and beyond. Writing a press release and sending it out? That's good, but that's not the best you can do. And that's what everyone expects here – the very best."

As noted earlier in the examination of leadership competencies, Padilla Speer Beardsley assigns a mentor for each incoming AAE, and the AAE can have some say in the selection.

Mentoring plays an important part in socialization, as this AAE explained:

"My mentor and I meet monthly, and others meet at different intervals depending upon their needs. So if you have questions, you go to that person. It's kind of your point person. And then you learn from your team, too. How does your team react to things? How does your team handle things?"

Designated mentors and formal supervisors are not the only influences on the socialization process at Padilla Speer Beardsley. Someone at the AAE level will often answer to several informal supervisors, and/or work alongside both peers and more senior professionals who influence their work, as evidenced by what a few of the AAEs had to share:

“I have learned my role a little bit through some of the senior managers that I work with, but mostly through people at my level or a level above me who have been here longer.”

“I learned my role in each account from the supervisor of that account. It’s often that you are working for five different people at any given time.”

“One thing I love about Padilla is I don’t feel the hierarchy that some companies have. The senior account executives and all of the senior-level staff are very approachable. If I have questions or anything like that, I have no problem going to them. That’s how I have learned.”

Socialization at Padilla Speer Beardsley includes formal indoctrination beyond on-the-job training (see Figure 4.6). For more than 20 years, the agency has offered a seven-week series of lunchtime learning sessions for new employees, called PSB Postgrad, a concept introduced earlier in this chapter when discussing the research site. As a reminder, this orientation program is required for employees hired at the AAE through SAE level, and optional for those hired at the AS level and above. According to the senior leaders who helped design and continue to implement the program, PSB Postgrad is designed to help new employees understand “how to survive in an agency, and in this agency in particular.” General orientation lessons are supplemented with specialized topics such as media relations and investor relations. An emphasis is placed on learning how to “work across the pile, not down the pile” – in other words, learning how to keep multiple plates spinning successfully.

**Figure 4.6 Socialization Process for New Employees**



However, PSB Post-grad is intended as general development, not job-specific training. Much of the specialized socialization comes from day-to-day experience within account teams, as articulated here by two account supervisors:

“The agency relies on you to be self-sufficient, but operate within the different workstyles of a team, and that’s something that’s really emphasized here from the minute you walk in the door.”

“Their job (as new employees) is to ask a lot of questions, follow-through on the direction provided, and constantly ask for new and different projects. Make themselves available to people so that they can get a broad range of experience, so that they don’t fall into the role of exclusively doing media relations or media lists. The biggest thing is just really doing as much as possible, even though you may not have done it before. There has to be a first time for everything.”

Typical of a newer employee at Padilla Speer Beardsley is this perspective provided by an AAE:

“My team is close; we collaborate really well. We have a very open atmosphere. If I have a question on something, I’ll say, ‘Hey, can we talk this out?’ And we talk it out. So it’s very collaborative within my group, which makes it easy to get in the groove of things and understand how things work.”

As evidenced, socialization is another important means through which collaboration happens in a high-performing agency. Every agency is not the same, though, and that is why it is essential to listen closely to respondents’ voices. Their collective voice provides a sense of the cultural factors unique to the setting and which influence collaborative behavior. The next section of this chapter explores organizational culture at Padilla Speer Beardsley in greater detail.

### ***Organizational Culture***

Beyond information-sharing and socialization, collaboration within Padilla Speer Beardsley is strongly influenced by cultural factors. Some contributing factors mentioned proactively by interviewees include the size of the agency, the fact that the agency is employee-owned, and even the fact that the agency is female-dominated and led by a female chief executive officer. However, the three primary aspects of organizational culture most often mentioned by interviewees were concern for the person, cross-collaboration, and an emphasis on learning and development.



## Concern for the Person

More than half of the employees interviewed for this project pro-actively mentioned concern for the person as a factor that influences culture and collaboration at Padilla Speer Beardsley. The agency accommodates flexible work schedules, telecommuting, and other arrangements to enable employees to balance personal responsibilities with professional demands. Very few respondents used the traditional phrase “work-life balance” to describe this aspect of agency culture, though. In fact, several used the phrase “concern for me as a person, not just an employee,” while others used descriptions like “concern for the whole person” and “being considerate of me as a human being.”

In fact, senior leaders interviewed eschew the phrase “work-life balance,” for they believe it wrongly gives the impression that Padilla Speer Beardsley is an easy place to work. Still, whether it is called concern for the person, work-life balance or another term, nearly all non-managers noted that the philosophy at Padilla Speer Beardsley differed significantly from that of their past employers, including other agencies. Two of the AAE’s explained it in these words:

“People here are very much humans first and employees second. At my old agency, if you left before 6:30 p.m., people were like, ‘What?’ I mean, I slept on the couch there sometimes. It was crazy, and you can only do that for so long. Here, it’s a very human environment.”

“It’s a great place for people with families. I’m getting married and want to be starting a family. I know that if I have kids, I will be able to go home and take care of them at the end of the day. If I was working for another agency, I would not be able to do that. It would be work-work-work all the time.”

Senior leaders echoed many of the same sentiments as non-managers, evidenced by what these senior leaders shared:

“What has kept me here and kept me happy is this very healthy work-life balance. And people being respectful of the fact you have a life outside of work. That’s so important to me, and why I left my previous agency – it had just this total disrespect for my life outside of work, regularly requiring 70-hour, back-to-back work weeks. People here are so willing to listen and provide you with opportunities to be happy with both your work life and your personal life.”

“We have a culture of respect, a culture of value, and I think people who have been around at all realize that not every place is like that. We listen, and I think we genuinely care about the people in these walls. Account work is hard and stressful. Most of us really try to not pile on other stress. And it gets very stressful if your mother is in the hospital. You have to deal with that. So, that’s work-life balance, where we say ‘Yes, go, don’t worry about it, we’ll take care of things here.’ We’re very good about that. I’m proud of that. I think long-term it helps the agency and it helps the person.”

It is also worth noting that more than one-third of all employees interviewed pro-actively mentioned job security as an important dimension of the agency’s concern for people. Most who voiced this perspective had been at the agency long enough to see times of prosperity, as well as times of relative struggle. Many mentioned that even if Padilla Speer Beardsley loses a client, it is extremely rare for an employee or employees to lose their jobs. Responsibilities are re-distributed and new business pursued, providing a sense of security for all when revenue is lean.

Showing concern for each person is a valued aspect of organizational culture at Padilla Speer Beardsley. In a similar fashion, employees show respect for one another across practice areas, often cross-collaborating to fulfill client needs.

#### Cross-collaboration

Nearly half of all interviewees pro-actively talked about cross-collaboration within Padilla Speer Beardsley. Most discussed how levels and lines are somewhat fluid, and that people are both able – and encouraged – to work across practice groups or take on occasional responsibilities and projects beyond one’s job title.

The agency maintains several employee committees specifically designed to foster cross-collaboration. PluggedIn, for example, brings employees together to work on community service programs. Another team exists solely to share social media expertise across practice areas. New employees are encouraged to become involved in the committees that most interest them, or the ones that will most help improve team and individual performance.

An SVP described working with colleagues from two other practice areas in order to provide the client with a blend of “unique experiences and expertise.” An AS said Padilla Speer Beardsley was “big enough to be full-service” yet small enough that “you have people you can go to, in order to keep learning.” One of the leaders explained it this way:

“Other agencies are very siloed. If you’re hired in a practice area, you can’t move. We’re smaller. We’re not global. So we can shift people around, or do a 50-50 split or whatever. Not only are you not stuck in a practice area, but you get broad-based experience and the opportunity to work with people in multiple practice areas. So you do maybe get better exposure to more professionals here than you would in a larger agency.”

Younger professionals within the agency were not as quick to acknowledge cross-collaboration. Most often, those at the AAE level mentioned being aware of the employee committees, yet still felt somewhat isolated within their own practice areas and account teams. It seems cross-collaboration may become more evident and meaningful the longer a person works for Padilla Speer Beardsley.

Cross-collaboration could not happen without some degree of awareness, across the agency, about the purpose and expertise of each practice area. This foundational awareness speaks to the learning culture at Padilla Speer Beardsley.

### Learning and Development

Nearly all of the non-managers who were interviewed pro-actively mentioned that learning and development contributed significantly to collaboration and the sense of collegiality

within Padilla Speer Beardsley. Leaders were much less likely to pro-actively mention the agency's emphasis on learning, though they affirmed the importance of learning once prompted.

"Keep learning" is one of the four core values maintained by Padilla Speer Beardsley. The others are "be our best, act with integrity and respect, and lead clients and deliver results." The agency defines "keep learning" as "questing continually for new ways of thinking and doing" and "having a restless disregard for the status quo."

The non-managers, who arguably benefit the most from being part of a learning organization, said that learning was exemplified to them through new employee orientation, on-going training, in-house seminars and workshops, other professional development programs outside the agency, informal and formal performance feedback from leaders and other colleagues, and opportunities to work on specialized accounts and varied projects.

One AAE summed it all up this way:

"This is the only place I applied to when I graduated. I really wanted to be here. I didn't want a place with small clients where I wouldn't get much experience. I also didn't want a huge agency where I was only working on one client. Why be at an agency if you're only working on one client? So I liked this agency and the multiple, substantial accounts I could work on. It is an open learning environment. There is always professional development stuff going on internally. And my team is the best. They're just fantastic. There are not many people who get up every day, do what they love, and do it with people they love. That I get to do that? I'm never leaving."

Most respondents talked candidly about why they joined Padilla Speer Beardsley, and why they have stayed with the agency. The organizational culture focuses on concern for each individual, while fostering collaboration across practice areas and learning and development for all. Collectively, these factors seem to provide a day-to-day work experience that becomes a breeding ground for leadership development.

### **Leadership Development: Building Leadership Competencies through Daily Work Experience**

Leadership development for non-managers, or those at the AS level and below, at Padilla Speer Beardsley is shaped by the nature and number of day-to-day tasks, the balance of tasks that provide a high potential for learning, and the degree to which collaboration encourages them to raise their voices and take risks. Evidence from observations suggest that tasks, indeed, drive much of the leadership development process at Padilla Speer Beardsley, and the collaborative culture, as well, provides an environment in which emerging leaders feel comfortable raising their voices (see Table 4.3). Each of these areas is described in this section of the chapter.

**Table 4.3 Dimensions of the Leadership Development Phenomenon, as Experienced through the Day-to-Day Work of Public Relations Agency Professionals**

<b>Dimension</b>	<b>Rate of Incidence (observed)</b>
<b>Everyday Work Experiences</b>	
Discussion involving feedback about a specific task	50.7%
Discussion about a task being complex	34.6%
Discussion about heavy workload	29.0%
Discussion about the diversity of tasks in progress	14.0%
<b>Experiences with High Potential for Learning</b>	
Non-manager influencing another person without the formal authority to do so	25.2%
Non-manager implementing change of some sort	24.3%
Non-manager assuming greater responsibility than his/her role dictates	16.8%
<b>Experiences Involving a Personal Sense of Safety</b>	
Non-manager raising his/her voice to formal leader in a group setting	45.8%
Non-manager taking risk without authority or approval from formal leader	2.8%

***“Constantly in touch”: Receiving immediate feedback on day-to-day work***

More than half of observed interactions at Padilla Speer Beardsley involved a leader providing a non-manager with direct, immediate feedback about a specific task. One afternoon, for example, an AS stopped by an AAE’s cubicle to discuss a feature story possibility with a significant news media outlet. The AS felt the client was excited by what the AAE may have potentially secured, but was also somewhat confused regarding details. The AS suggested the AAE follow-up as soon as possible with the client by phone. The AS offered to be on the call, if the AAE felt reinforcement was needed. Otherwise, the AS made it clear that the AAE could handle the situation, drawing upon some of the bits of advice the AS shared regarding how to handle the conversation.

Real-time feedback is reflective of what is experienced by many of the non-managers at Padilla Speer Beardsley, even if that feedback is not always coming from a formal leader or client. As one AAE said:

“Not every project do I get immediate feedback or even a touch-base or whatever with my supervisor. But through the course of the day, there is some sort of feedback on almost everything I am doing. Even if it’s just a peer or someone else sharing some edits.”

Immediate feedback may come in the form of an e-mail message, a face-to-face conversation, or even just handwritten edits placed on someone’s desk. Respondents described this dynamic feedback process using phrases like “lots of back-and-forth,” “sharing quick feedback,” and “constantly in touch on things.” This richness and frequency of daily feedback may be essential for non-managers as they strive to gain competencies in a complex industry.

***“Not something everybody can do”: Navigating the day-to-day complexities of PR***

Employees talked candidly -- in observed meetings and in private interviews -- about the difficulty or intricacy of specific tasks or projects. Non-managers found the greatest complexity in tasks such as planning and managing aspects of a multi-faceted campaign or project; working through layers of internal and external approval on client messaging; understanding and interpreting a client's operations, products and services; developing and pitching in-depth news topics to specialized news media; and, researching and preparing new business proposals.

Many non-managers made a point of saying that public relations and integrated communications are not inherently complex crafts. However, they explained that the complexity comes from the people, processes, and politics that are required to do the job effectively and successfully. One AE described task complexity this way:

“Communications isn't rocket science. It's really just letting people know the information they need in the best and most simple way possible. On the face value, that's not very complex. But how do you manage your relationship with your client, your internal team? How do you factor in approvals within those, and also still get an end product that means something to everyone? So that's very complex, and that's not something everybody can do. Also, if you think of media relations, how hard is it to pick up the phone and pitch a story? Well, not very hard. But how difficult is it to make sure that you can tell a competing story across media and actually get results that are more than just chance or a fluke? That's complex.”

Among the non-managers, there was not clear consensus about the rate at which task complexity comes into one's day-to-day work experiences. This may be due to the performance level of the specific employee. For some, it took a year or longer to achieve a recognizable degree of complexity in their assigned tasks. For others, taking on complex work happened within months of starting the job. These two AAE's perspectives are typical of the disparity that emerged during interviews:

“I started as an intern, and it takes a long time for people to stop delegating media-list work because it’s such a low billable rate. They can’t help but use you for those things.”

“When I first started, I’d never had any experience or exposure to media relations. So I was pitching (the news media), but not a ton, just smaller projects. Now, I’ve been given the opportunity, within the next month, to be working for a new client and pitching national media like Dateline, 20/20, and so on. I’m confident to do that now, and I definitely wouldn’t have been ready when I started here six months ago.”

Working in a high-performing agency requires the ability to function in a complex environment while taking on increasingly difficult assignments. One way in which non-managers may adapt the right mindset is to get comfortable with the heavy workload that seems to inherently come with working for a public relations agency.

***“One thing after another”: dealing with a heavy workload***

At the AAE level, respondents reported handling, on average, 10.5 different tasks or projects per day. A task might be attending a meeting, doing some writing, talking with a reporter or client by phone, monitoring news coverage, or compiling a report. The self-reported frequency ranged from a low of five different tasks per day to as many as 20 different tasks on an especially busy day. Moreover, nearly one-third of all interactions between leaders and non-managers revolved around the high frequency of tasks being handled by the non-manager – or, as the respondents often called it, “heavy workload.”

Most of the AAE’s talked extensively about how demanding their jobs are, both in terms of volume and expectations for quality output. Several respondents described their work days as “crazy,” and most of the AAE’s said they work in 30-minute or 15-minute increments, constantly “jumping from project to project” in order to meet demand.

Switching gears so often provides employees with the opportunity to interact with many colleagues and clients each day. However, as noted by employees at nearly all levels, it can be



difficult in an agency setting to concentrate, prioritize tasks, and do quality work. Several talked about prior positions or internships in corporate settings, where the pace was slower, and the work more focused and generally much less collaborative. Agency experience was seen as a direct contrast to the corporate model. As one AAE said:

“Putting two hours in at one time is about as much as I can do without announcing to everyone, ‘I’m going to work on something and may not respond for a while.’”

It is not just non-managers at Padilla Speer Beardsley who must contend with a full plate. In fact, with the exception of the SVP’s who were interviewed, all other formal leaders generally agreed that the workload is usually heavy. In the words of an AS:

“Maybe one day every two weeks there will be a project or a minor crisis that comes up where I devote my full attention to it for periods of two-and-a-half to six hours. More typical than that would be one thing after another, or reacting to whatever’s coming into in the inbox.”

Understanding workload is an important first step toward understanding day-to-day agency experience. However, there is more to working in an agency than simply handling a significant volume of work. Other factors are influential, as well, including just how diverse those tasks and assignments can be.

### ***“All over the place, all of the time”: Handling diverse challenges***

The workload is heavy at Padilla Speer Beardsley and people are switching gears often. On top of that, most respondents feel their responsibilities are greatly varied. It is not a matter of simply moving from one task to a similar task, but rather being able to adapt quickly to a variety of different challenges and moving efficiently from one diverse task to another. In fact, the variety of daily work was a near-constant theme in one-on-one interviews, though that variety

was more difficult to discern through observation, as most interactions were about a specific task, not comparing a current task to the prior or next task on a person's to-do list.

To be specific, non-managers at Padilla Speer Beardsley said that they regularly work on a wide range of duties. This spectrum ranges from administrative tasks like scheduling meetings and updating databases to strategic work like developing plans and managing client relationships, albeit often for relatively small accounts.

In describing the diversity of their assignments, those at the AE level and below often compared their work at Padilla Speer Beardsley to prior work experiences for other employers. One AAE, for example, referenced a corporate communications position in which the responsibility was to write a handful of stories each day for the employee intranet. This individual feels that working at Padilla Speer Beardsley is "completely different from that."

Several of the AAEs described task variety in these words:

"I'm all over the place, all of the time. I can be typing an e-mail and be on the phone at the same time. I can be surfing the Internet and talking to someone at the same time about an article. I can't even describe it. I have to be a multi-tasker to the nth power."

"I rarely have a day where I work on just two or three projects. That's something you really have to balance. You're always working on a lot of different clients, and making sure that things keep moving forward."

Moving forward is, indeed, what happens at Padilla Speer Beardsley. Fewer than five years of industry experience differentiate the average AAE from the SAEs who are just one step away from formal management. Thus, in a span of just five years or so, an employee at the agency can grow from handling entry-level tasks to preparing for a formal leadership role. This process evolves in a fluid fashion; it is not a rigid, step-by-step process, according to those who have been promoted at least once within the non-manager ranks.

In the words of an SAE:

“It’s not like you become a SAE and day one your responsibilities change. I think every day you’re here, your job grows and you’re given opportunities to more and different work.”

At the surface, much can be said about work experience from how much work people are doing and how complex and diverse that work is. However, in the midst of all of these tasks, there are specific experiences that provide rich potential for learning and growth. The next section looks at these experiences more closely.

### ***Experiences with high potential for learning***

At Padilla Speer Beardsley, more than two-thirds of all observed incidents involved high potential for individual learning and professional growth, meaning specific situations that enabled the non-manager to take action or responsibility beyond his or her formal job description. These specific experiences most often involved a non-manager influencing without authority or creating change. (See Table 4.4).

**Table 4.4 Observed Incidents with High Potential for Learning**

<b>Observed Incidents with High Potential for Learning</b>		
<b>66.3% (71 of 107)</b>		
<b>Influencing Without Authority</b> 38.0% (27 of 71)	<b>Creating Change</b> 36.7% (26 of 71)	<b>High Level of Responsibility</b> 25.3% (18 of 71)

#### **Influencing Without Authority**

Non-managers who were interviewed for this study shared that they most often have to influence without authority when delegating work to peers or interns; following up with formal leaders to make sure they review drafted materials in a timely fashion; or advising clients on projects, particularly ones involving social media. Of interactions with the high potential for learning, nearly four in 10 were observations of non-managers influencing without authority.

One example was a late-afternoon discussion, in which an AAE approached an SAE about the fact that the SAE had not forwarded a project to the client by the time the client expected it. The AAE had finished the project early and provided it to the SAE in plenty of time. Because the SAE did not follow-through on time, the AAE took a heated phone call from the client and then had to follow-up with the SAE, trying to influence the SAE to get the project off to the client for review.

### Creating Change

More than one-third of observations involved a non-manager attempting to create or influence some sort of change within the agency, within an account team, or on a specific client project. Every AAE interviewed said he or she had created some sort of change within the agency, often within a few months of joining the agency. The changes were often refinements to certain processes, such as the monitoring of news media coverage, or the formatting of certain client projects. In at least three instances, AAEs had pro-actively developed and proposed more robust social media strategies for clients. These recommendations were unanimously adopted and implemented.

### High Level of Responsibility

Roughly one-fourth of observations were of non-managers taking on a level of responsibility higher than their formal job descriptions require, or responsibilities greater than what is typical of someone in that role, based on observations. Often, these situations involved an SAE being in charge of a project involving higher-level colleagues, or an AAE having sole responsibility for client contact and/or task delegation on smaller accounts.

Still, learning does not happen in isolation. It is a process that inherently involves other people. In the collaborative culture of a public relations agency, it is important, once again, to

understand respondents' experiences. What does it feel like to work in the agency? How safe does a person feel to speak up or take a chance? The next section explores these perceptions.

### ***Experiences involving a personal sense of safety***

#### **"Your opinion will be heard": Feeling safe speaking one's mind**

Of the 107 interactions observed between leaders and non-managers at Padilla Speer Beardsley, nearly half involved a non-manager speaking his or her mind. Moreover, with only one exception, every non-manager interviewed at Padilla Speer Beardsley felt he or she could speak his or her mind about anything. The respondents talked eagerly about ideas they have proposed, concerns they have raised, questions they have asked, and recommendations they have made to formal leaders of the agency. Unanimously, they felt encouraged by senior officers to speak their minds, and they felt their voices were being heard. As one AAE said:

"I feel safe raising my voice here. And I can say that with absolute confidence because even the CEO is open to hearing your feedback."

It was clear that social media provide a unique platform from which non-managers, particularly AAE's, can raise their voice and be heard. One AAE talked about a client's social media strategy, which had been limited solely to Facebook and Twitter. The AAE raised a red flag internally, and proposed a more robust strategy. The client approved the recommendation. A colleague, who is also an AAE, explained social media influence this way:

"I don't feel they look at me like, 'Oh, you're only an AAE.' Our field is changing so much. It's evolving; just look at social media. There is such a difference between what a senior-level person knows and what we know (about social media). They really do look to us, and want us to voice our opinions."

Whether it is social media strategy for a client or simply a concern within the agency itself, those employed by Padilla Speer Beardsley mentioned, time and again, how important it is to control one's emotions and think through a complaint or suggestion before sharing that topic

with others, particularly with supervisors and manager. In fact, two of the AAE's explained it this way:

"I certainly feel like you can raise your voice here. It's not an organic, natural part of conversations, because everything here is meeting-based, it seems. You'd really have to schedule a meeting to discuss something. That might be intimidating for a lot of people, but once you schedule a discussion, people will be happy to listen."

"We foster a culture where as long as you are voicing your opinion with reason, and as long as you've composed yourself as a professional, your opinion will be heard."

Even the formal leaders sense that Padilla Speer Beardsley is a place where the newest and least experienced employees feel comfortable raising their voices. As one VP noted:

"We have a very collaborative environment here. And people feel empowered because of that. When I was coming up in my career, only the experienced people spoke up. But today what I find is that has shifted and the younger people are feeling more empowered. We have a bunch of twentysomethings and thirtysomethings here, who fit that new generation. From what I've experienced, it's not just the experienced people who speak up here at this agency, it is the young people, too. The bottom line is we all feel empowered to speak, but some simply speak from more experience than others do."

Certainly, a non-manager will feel a sense of liberation and perhaps empowerment from working for a company that wants to hear his or her voice. Can words move to action, though, especially in the absence of formal supervision? The next section examines the degree to which people at Padilla Speer Beardsley feel comfortable pushing the boundaries.

#### "The Padilla way": A conservative approach to taking risks

Through interviews, it became clear that senior officers are willing to consider what may be perceived as risky, or untested, strategies. However, nearly every person interviewed – regardless of level – emphasized that there would need to be solid rationale and a well-conceived plan for implementation, and that the concept would need to be run by multiple senior officers internally. Even then, it was unlikely that a truly untested strategy would be adopted. That simply

is not “the Padilla way,” as many described it. Two AAE’s explained how it works, in their terms:

“I would be nervous to send something to, or to start talking about anything with, a client before getting it passed by a supervisor.”

“Our risk-taking is managed by the officers. If we’re pitching a big client, we might come up with out-of-the-box ideas, but it feels safer to them to go back to our very conservative approach. That’s what they know. That’s what they have always done. So, even though we’re encouraged to be creative, our efforts are often stifled.”

A supervisor for one of the AAE’s has told the AAE to just run with things when the supervisor is out of the office. The AAE has been told to ask another supervisor, if necessary, but, otherwise, to just proceed. The AAE “is not comfortable doing this, even with small tasks.”

As another AAE said:

“I really try not to take risks at all. If I’m on the phone with a reporter and they’re on a deadline, I’ll still say, ‘I’ll call you back.’”

Of the 107 interactions observed between leaders and non-managers at Padilla Speer Beardsley, only three instances involved risk-taking. However, the foci of the observations – that is, leaders interacting with non-managers – would preclude someone taking action without supervisory approval. Thus, the observation methodology did not lend itself particularly well to this aspect of the study.

### ***Contingencies: Age, gender, ethnicity, and work environment***

Beyond the original research questions, other considerations came to light during the field research and subsequent analysis of field notes and interview transcriptions. These contingencies include the age, gender, and ethnicity of employees, all of which may play some role in how leadership development happens within the agency.

### Age

As noted earlier, the youngest employees – typically those at the AAE level – are perceived as social media experts. They are asked to contribute social media strategies to broader strategic plans for clients, and, in some cases, even create entire plans specific to social media and other digital media. This level of responsibility is an outlier relative to an AEE's, or even an AE's, typical realm of influence. Social media have created a unique developmental opportunity for young public relations professionals. This may help expedite development and growth.

### Gender

The employee base at Padilla Speer Beardsley is largely female, which is not necessarily inconsistent with the public relations industry, as a whole, or other public relations agencies, in particular. However, in the previous chapter, it was noted that the population of female formal leaders was over-represented in the interview process. A significantly higher percentage of female leaders agreed to be interviewed than is representative of the actual proportion of female leaders in the agency. This may or may not have skewed some of the findings. Regardless, there is notable potential for women to develop leadership competencies and grow into formal leadership roles within Padilla Speer Beardsley. This is not always the case for women who work in other types of industries and environments.

### Ethnicity

It is important to note that the employees of Padilla Speer Beardsley are predominantly, and almost exclusively, Caucasian. This is another factor that may influence the leadership development process, or, at the very least, may make the leadership development process differ from an agency with a more diverse workforce.



## Work Environment

The environment at Padilla Speer Beardsley's headquarters may have some influence on findings. First, practice areas are divided by floors, and this must invariably have some impact on information-sharing and other collaborative behaviors. Second, people are encouraged to use private rooms to make pitch calls to news reporters; not being able to very often hear others talk with the news media by phone may limit the ability to learn by example. Finally, formal leaders are, by and large, in offices with doors while non-managers are in open-air cubicles. This is yet another factor that must play some role in informal interaction and perhaps limit the possibilities for informal, impromptu mentoring.

## **Summary**

Data collected through participant-observation and semi-structured interviews form a baseline understanding of what agency experience means within one high-performing environment. This knowledge reflects the input of a cross-balance of formal leaders and non-managers, all of whom voluntarily agreed to be observed and/or interviewed for this study.

A primary insight is that leadership, within the agency environment, involves coaching, collaborating, and clarifying. Most of the leadership activity focuses on coaching. All three steps form a non-linear process through which formal leaders help non-managers stay on track and making progress toward desired outcomes.

Collaboration takes on unique connotations at the non-manager level. Among these less-experienced professionals, collaboration most often involves sharing information in order to complete work or resolve problems. Another important, albeit less frequent, aspect of collaboration in a public relations agency involves socializing new employees to their roles and

responsibilities. Non-managers feel certain aspects of organizational culture influence collaboration, namely concern for the person, cross-collaboration, and learning and development.

A person within a high-performing public relations agency takes only five years, on average, to move from doing entry-level work to preparing for a formal leadership role within the organization. This fact speaks to the power of day-to-day work experience in an agency setting.

In terms of day-to-day work experience, non-managers within a high-performing public relations agency often handle a high volume of tasks, and tasks that are complex and diverse. Completing these tasks generally involves receiving some sort of feedback from a formal leader, in at least half of instances. Some tasks provide a high potential for leadership development, and these are often projects that require the non-manager to influence someone else, over whom he or she has no formal authority.

As a whole, non-managers in a high-performing agency feel comfortable speaking their minds when they have ideas or concerns. The environment provides this important sense of safety. Much less evident, though, was formal support for taking risks.

## **CHAPTER 5: DISCUSSION**

The findings in the preceding chapter support the notion that public relations agency experience is, indeed, a form of leadership development, one unique in several ways to other industries. Evidence suggest that coaching, contributing, and clarifying are the core competencies of formal agency leadership, with collaborative yet self-motivated work experiences shaping the largely informal ways through which non-managers develop these leadership competencies. Furthermore, the findings suggest that an agency environment is one in which non-managers feel safe speaking their minds. With these findings as a springboard, this chapter analyzes agency experience relative to existing theories and models of leadership, leadership development, and day-to-day work experience. The discussion begins with a review of the four research questions, and concludes with an assessment of additional considerations and ideas for further research.

### **Analysis of Findings**

#### ***Coaching and clarifying: The dominant leadership competencies***

The first of four research questions sought to identify competencies displayed by formal leaders of Padilla Speer Beardsley. As noted in the prior chapter, three general themes of leadership competency emerged from observations and interviews. Formal leaders coach non-managers, contribute to strategic direction and planning, and clarify situations that may arise during project implementation.

To better understand these findings, the general themes were mapped to the Gregory model of public relations competencies. Evidence revealed that formal leaders, or those at the AS level and above, most often coached colleagues or clarified situations, rather than contributed directly to project planning (Gregory, 2008). Still, formal leaders did display all 10 of the competencies, or sets of behaviors, that have been shown as vital to public relations leadership in the private sector (see Table 5.1).

**Table 5.1 Incidence of Observed Leadership Competencies, adapted from Gregory (2008)**

Competency	Indicators	Rate of Incidence
<b>Coaching</b>		
Leading and supporting	Provides direction, advice and coaching. Supports and encourages. Fosters openness and information-sharing.	51.0%
Strategic/long-term view	Thinks broadly and strategically. Plans ahead and remains focused on organizational objectives.	37.9%
Preparing thoroughly	Spends time understanding tasks and objectives. Prepares carefully and thoroughly for situations that may occur and cause difficulties. Prepares for formal events and meetings.	11.6%
<b>Contributing</b>		
Understanding others	Remains open-minded when taking into account individual views and needs. Demonstrates interest in others; empathetic. Works towards solutions of mutual benefit.	22.1%
Communicating	Communicates clearly (verbally), consistently and convincingly.	21.0%
Networking	Talks easily to people at all levels both internally and externally. Canvases opinions widely and builds strong infrastructures to receive and disseminate information.	17.9%
<b>Clarifying</b>		
Investigating and analyzing	Gathers, probes and tests information. Shows evidence of clear analytical thinking. Gets to the heart of complex problems and issues.	33.7%
Maintaining a positive outlook	Responds positively to changes or setbacks. Remains calm and in control of own emotion. Manages pressure well.	20.0%
Taking responsibility for high standards	Behaves consistently with clear personal values that support those of the organization. Takes responsibility for the standard of organizational communication and for their own and team's actions.	16.8%
Making decisions and acting	Willing to make tough decisions quickly based on the information available. Successfully generates activity and shows confidence in the chosen course of action.	5.3%

### Most Evident Competencies

From the 95 distinct interactions observed between formal leaders and non-managers, the competency most often evident was leading and supporting. Leading and supporting involved providing direction, advice, and coaching to individuals or teams; supporting and encouraging others; and fostering openness and information-sharing, which supports Gregory's (2008) model of public relations competencies. This competency was evident in more than half of all interactions. Additionally, the competencies of maintaining a strategic/long-term view and investigating/analyzing were also evident in more than one-third of observed interactions between leaders and non-managers. Maintaining a strategic/long-term view involved thinking broadly and strategically, planning ahead and remaining focused on organizational or client objectives. Investigating and analyzing involved gathering, probing and testing information; showing evidence of clear analytical thinking; and getting to the heart of complex problems and issues.

What emerges from this analysis is a portrait of the formal agency leader as someone who provides direction and thinks strategically, focusing on employee performance and the achievement of long-term objectives. The formal leader is not, according to this case study, one who is as intimately involved in day-to-day project work and interaction. The leader's role emerged as one of director and visionary, rather than in-the-trenches colleague. In this way, we begin to recognize and understand that agency experience is not an authoritarian, top-down leadership phenomenon. Rather, leadership within a high-performing agency is truly a process shared among formal leaders and non-managers. Formal leaders coach, contribute, and clarify as necessary, but otherwise stay largely removed from day-to-day agency operations at the client

service level. Agency leadership, then, is an intricate and balanced dance among those who know the industry and the organization exceptionally well, and those who are still learning the art and science of public relations, as well as the intricacies of working in an agency environment.

### Least Evident Competencies

Further underscoring the unique nature of agency leadership, some competencies expected of public relations leaders in the private sector were not as often or as clearly evident during field research. In particular, formal leaders made decisions and took action in only one of every 20 interactions with non-managers, and seemed well-prepared for meetings and discussions in slightly more than one of every 10 interactions with non-managers. These were the least evident competencies among leaders at Padilla Speer Beardsley.

Making decisions and acting involved being willing to make tough decisions quickly based on the information available; successfully generating activity; and showing confidence in the chosen course of action. Preparing thoroughly involved spending time understanding tasks and objectives; preparing carefully and thoroughly for situations that may occur and cause difficulties; and preparing for formal events and meetings, supporting Gregory's (2008) competencies model. Notably, this competency is difficult to observe, and the great majority of observations in this particular study were of incidental, or unplanned, interactions. If these incidental observations were not taken into consideration, we would likely see this competency rise to a more expected level. Formal leaders at Padilla Speer Beardsley provide coaching on strategic direction, and they help non-managers navigate challenging situations. Presumably, they invest a considerable amount of time and energy thinking about the future of the agency's clients, and even the agency itself. Had formal leaders been observed alone in their offices, for

example, it is likely that a good deal of planning happened before and between the periods of incidental and intentional observation that involved interactions with non-managers.

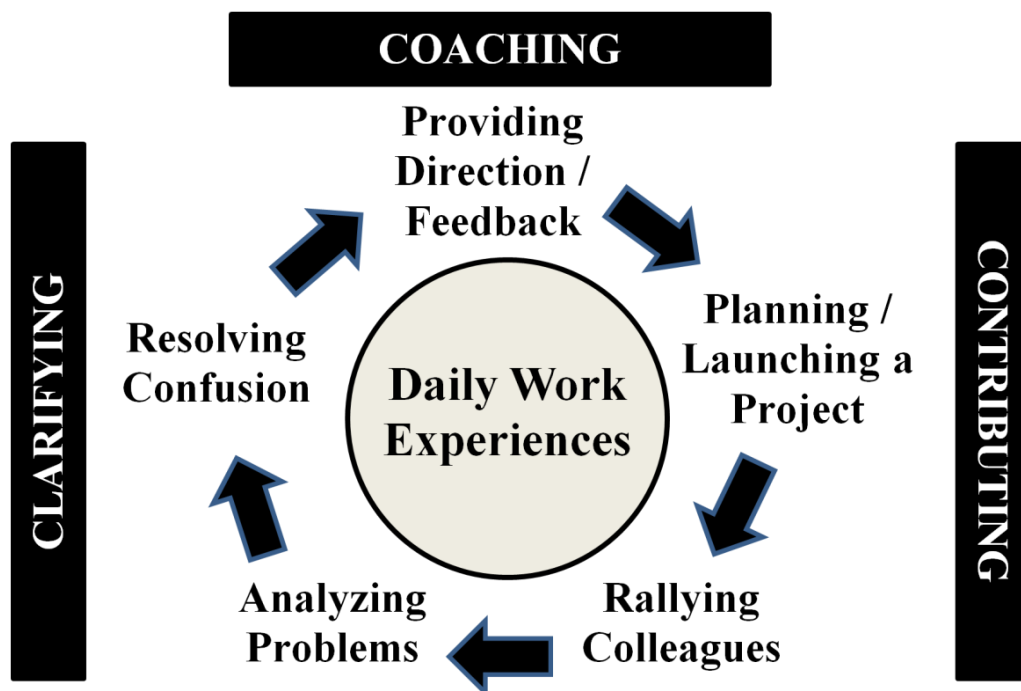
Still, it was rare for a leader to seem thoroughly prepared for interactions of any sort, and this invariably influences the leadership impression made upon non-managers within the agency. In fact, the few times that leaders seemed thoroughly prepared were during regularly scheduled staff or account team meetings. For example, in one team meeting, the leader had prepared a formal agenda that included a discussion about the complexity of a particular media relations initiative. The leader pro-actively discussed, in detail, a way of re-organizing the work, in order for the project to proceed more smoothly. In incidental observations, though, leaders were most often in a reactive mode. These incidental discussions were most always about a non-manager sharing an urgent concern or a new idea, and the leader reacting to that shared idea or concern by probing for more detail, asking questions, sharing information, or otherwise helping non-managers clarify and resolve a situation. The onus seemed to be on the non-manager to have a game plan or a viable solution, or even a number of viable solutions, in mind before engaging the leader. This dynamic, in and of itself, may be an influential form of leadership development for non-managers. As noted earlier in this dissertation, most public relations leadership studies have not examined leadership as a shared process or investigated how the leadership process might fuel leadership development. This case study provides first-hand evidence that, at least in a high-performing agency environment, leadership is a shared process that places considerable accountability on the non-manager, rather than the formal leader. Armed with this knowledge, we have a foundation from which to examine more closely the specific ways in which non-managers grow and develop into leaders. A good deal of this will come from better

understanding how the interactions happening among formal leaders and non-managers reflect, or deviate from, known models of leadership process.

***Teams and situations: The public relations agency leadership model in action***

The second of four research questions sought to identify which leadership process model, if any, best reflects a high-performing public relations agency such as Padilla Speer Beardsley. Findings shared in the prior chapter indicate that the leadership process involves formal leaders coaching, contributing, and clarifying, all within a process that is, by and large, team-oriented, situational, self-motivated, and inclusive (see Figure 5.1). These characteristics are evaluated against the most relevant leadership process models, in the following pages.

**Figure 5.1 Leadership Process within a High-Performing Public Relations Agency**





## Team Leadership

As noted in the prior chapter, colleagues at Padilla Speer Beardsley work on multiple account teams; their success is gauged by progress made toward clients' goals, as well as how efficiently the teams operate in striving to meet those goals. Most non-managers take direction from more than one formal leader, given that they work on more than one account team and sometimes across practice areas.

This finding supports the team leadership model, in which the leader monitors the team and takes action(s), as appropriate, to ensure team effectiveness (Norton, 2010). The leader will take actions that are either task- or relationship-oriented, or actions that address the environment within which work is to be completed. All actions are directed toward improving team performance. The evidence from field research suggests strongly that a team leadership model is in effect at Padilla Speer Beardsley and, presumably, other high-performing public relations agencies.

Prior studies about public relations leadership have largely failed to acknowledge and examine the team-oriented nature of public relations work. The influence that such a strong team orientation may have on leadership processes and leadership development, particularly in the agency setting, is significant. It may be that a young professional in a high-performing agency believes that formal leaders value team success more than individual glory. This mindset could dramatically affect the attitude and approach one takes to handling day-to-day work and to navigating relationships with colleagues and clients alike. A collaborative, team-oriented environment might help the non-manager see beyond his or her own ego and perhaps more quickly develop the relationship-building and personal influence skills necessary to be effective in counseling public relations clients. In this way, the team-oriented model would be seen as

improving collaboration and client service, not to mention the leadership skills any new professional needs to be successful in the practice of public relations.

### Situational Leadership

At Padilla Speer Beardsley, situational leadership is strongly evident. Multiple account teams and job titles with fluid responsibilities result in unique situations that must be addressed each day. Most situations are resolved in a supportive fashion, particularly when AAEs or AEs are involved. Formal leaders maintain a clear focus on understanding the needs of the person involved in the situation, and helping the person feel good about bringing the situation to closure. Some situations are met with a more directive leadership style, though this was most evident when only more-senior employees were involved.

This finding supports the body of literature associated with situational leadership, which involves recognizing what employees need and adapting one's leadership style accordingly for each employee, given the situation at hand (Northouse, 2010). The style necessary for any given situation may either be more supportive or more directive in nature. Supportive leadership is exemplified by two-way communication between leader and follower, with an emphasis on helping the employee feel confident and capable. A more directive style, on the other hand, is a heavy-handed, top-down approach, with one-way communication from the leader and very specific goals, tasks, and expectations for the follower.

In fact, situational leadership may range from delegating, which provides little direction and little support to the non-manager, to coaching, which provides strong direction and strong support (Northouse, 2010). Likewise, situational leadership may also involve supporting, which provides little direction yet strong support to the non-manager, or directing, which provides strong direction with little support. Mapping the situational leadership model with the public

relations agency experience model, we would find that most leadership behaviors fall within the “coaching” category, or that portion of the spectrum involving strong direction and strong support.

Indeed, it is safe to say that most of the situational leadership evident through observations at Padilla Speer Beardsley was of a strongly supportive nature. The communication was largely two-way between formal leaders and non-managers, and the formal leaders’ emphasis was often on coaching the individual or clarifying a situation, so that the non-manager could effectively resolve matters. In this way, the case study adds a dimension to our understanding of public relations leadership. We see that situations help open the door for leadership and leadership development – often in a supportive, two-way manner, and sometimes in a top-down, one-way manner, but always as an interaction or process happening between leader and follower. Public relations leadership, then, is not about a role, or even about the competencies that a person in that role possesses, which are characteristics upon which much of the public relations literature has relied (e.g., Berger, 2005; DeSanto & Moss, 2004; Gregory, 2008; Lee & Evatt, 2005). Rather, public relations leadership is a situational phenomenon, involving not only roles and competencies but also interactive processes.

#### Other models

During the field research at Padilla Speer Beardsley, a few leadership models were not as fruitful in revealing the leadership dynamics at the agency. These models include path-goal, leader-member exchange, and transformational.

#### Path-goal

In observing workflow at Padilla Speer Beardsley, the path-goal model was not as insightful as other leadership models. Motivation is not a facet that was explicitly or implicitly

noted during the research period. Path-goal theory focuses on employee motivation, and specifically helping employees feel capable in doing their jobs. Whereas situational leadership calls for a leader to adapt to an employee's developmental level, the path-goal approach is more about motivation than capabilities. The role of the leader is to help the employee achieve defined goals by removing obstacles and providing necessary support (Northouse, 2010).

### Leader-member Exchange

Most respondents talked of the environment as being highly inclusive, with no sense of favoritism or cliques, which refutes elements of the leader-member exchange model (Northouse, 2010). The leader-member exchange model is predicated on the concept that leadership is largely a set of dyadic processes between the leader and each follower, which results in there being in-groups and out-groups of followers within a team (Northouse, 2010). From interview transcripts, there was virtually no evidence of in-groups or out-groups, as one would expect from a leader-member exchange model. However, 19 of the 21 incidental observations at Padilla Speer Beardsley involved only two people – a leader and a non-manager/follower. In this sense, it could be argued that leadership in a high-performing agency is, indeed, a largely dyadic process, at least when it comes to resolving task-related issues.

### Transformational

Transformational leadership is about connecting with others in a way that elevates the motivation and morality of all involved in the organization or culture (Northouse, 2010). This may involve being an idealized influence for others, or providing inspirational motivation, intellectual stimulation, or individualized consideration. In observations at Padilla Speer Beardsley, it was difficult to discern any elements of the transformational leadership model. This may, in large part, be due to the field research lasting just three weeks. Had the research gone on

for several months or longer, aspects of transformational leadership might have been more evident.

To summarize, these three models of the leadership process – path-goal, leader-member exchange, and transformational – were not strongly evident at Padilla Speer Beardsley. Interviews revealed that formal leaders expect a high degree of self-motivation from all colleagues, including non-managers, which would explain why the motivational aspects of the path-goal model were missing. Likewise, interviews indicated that the agency is an inclusive environment without in-groups and out-groups. Thus, while formal leaders at Padilla Speer Beardsley may maintain dyadic relationships with non-managers, these relationships are not exclusive or exclusionary, in the way one might typically expect with a leader-member exchange model. A strong team orientation may prevent in-group, out-group dynamics. Finally, like any agency, Padilla Speer Beardsley is strongly focused on client service and client outcomes. Such a focus may naturally inhibit the inspirational and intellectual undertones of transformational leadership. Motivation may likely come more from wanting to serve clients well, rather than necessarily elevating the agency itself.

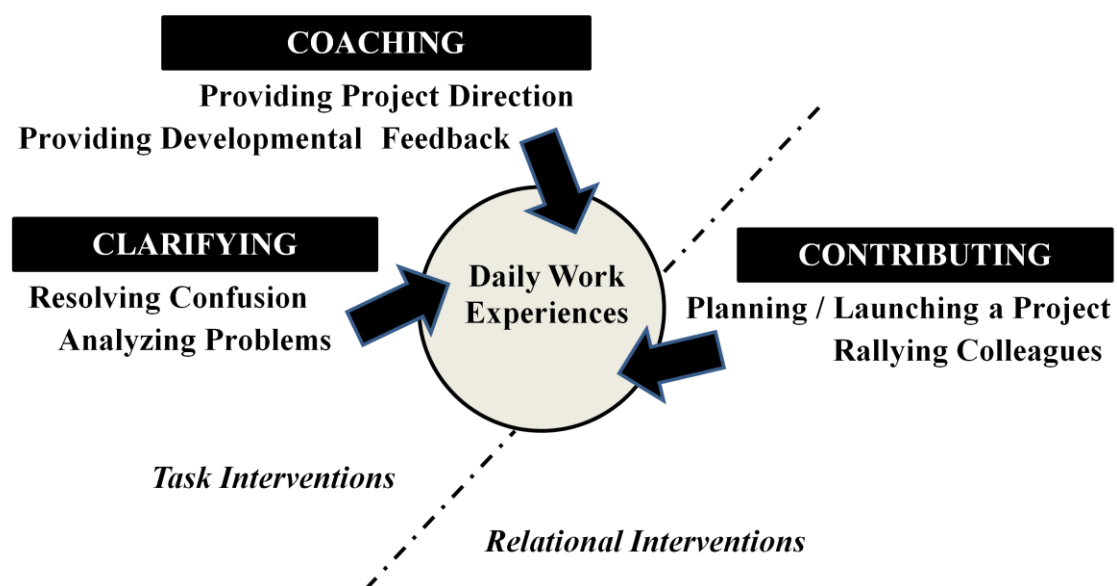
#### “Agency Experience” Model

The leadership process within a high-performing public relations agency, then, best reflects the team leadership and situational leadership models. Coaching, contributing, and clarifying – represented in reverse-type within Figure 5.2 – exemplify the interventions a leader would make if he or she felt team performance was at risk. These interventions are either task- or relationally-oriented (Northouse, 2010). For the public relations agency leader, a task intervention might likely be a coaching or clarifying situation, while a relational intervention might likely be a contributing opportunity, through which the leader steps in to ensure the

account team as a whole is on target and that individuals within the team are collaborating effectively.

The situational leadership model is also at play within a high-performing public relations agency. In a situational leadership model, the formal leader stays mindful of the fact that each employee is at a different point, development-wise, and provides individualized coaching based on specific situations (Northouse, 2010). This body of leadership development – represented by the shaded circle at the center of Figure 5.2 – comes as a result of interventions made by the formal leader. The feedback looks and feels differently to each non-manager, based on his or her own level of competency and conviction, as well as the specifics of the situation. In this way, the leadership process model shifts from a set of interventions encircling day-to-day agency operations, to a set of situation-specific interventions. These interventions focus largely on tasks, and less often on relationships, but ultimately all help foster leadership development for the non-manager facing the situation.

**Figure 5.2 Leadership Process within a High-performing Public Relations Agency (Revised)**



Having a more clearly defined understanding of the leadership process model within a high-performing public relations agency provides several valuable insights. First, formal leaders can become cognizant that their greatest influence may often come in specific situations, and in interventions that typically take the form of coaching, contributing, or clarifying, and most often within the coaching or clarifying realm. No longer should formal leaders view their leadership role as a consistent, static, one-dimensional force. In fact, leaders shine “in the moment,” with something as simple as a well-timed, much-needed piece of strategic insight. Second, formal leaders can grow to realize just how important it is to know and understand where a non-manager is along the professional development continuum, in order to provide tailored and truly effective situational leadership. Third, non-managers can begin to have an appreciation that the most influential mentoring may come largely in heat-of-the-moment, task-oriented situations, rather than planned, semi-annual, formal performance reviews. This may, at times, feel like leaders are swooping in only when new client projects emerge or project implementation problems arise. In reality, the formal leaders are giving non-managers the room to take ownership and test their wings; the leaders are creating an environment in which trust is granted, yet cautiously and strategically monitored. For non-managers, and even for the formal leaders themselves, having a clearer picture of this process model in mind could help foster an even more robust, dynamic, and mutually beneficial work experience. A non-manager could take ownership of a series of national live broadcast interviews with the chief operating officer of a client organization – a high-profile and high-risk project. He or she could do so, knowing that the formal leader will keep a watchful eye, intervening as appropriate to ensure the work stays on track. This would provide the non-manager with a truly challenging responsibility and the safety net necessary to

give him or her confidence to take the reins, knowing that help and guidance from a formal leader is there, if needed.

***Sharing and socializing: Collaboration within a public relations agency***

The third of four research questions for this study sought to determine how collaboration is exemplified in a high-performing public relations agency. Evidence from field research reveals that information-sharing and group decision-making are important collaborative endeavors within a high-performing public relations agency. As noted in the prior chapter, most of the collaborative behavior at Padilla Speer Beardsley involves information-sharing between colleagues, and that information-sharing most often happens between colleagues at the non-management level.

At Padilla Speer Beardsley, information flowed freely and graciously between colleagues, particularly those at the non-manager level. This fact reflects on the agency's strong focus on teamwork, as well as the sense among colleagues, especially non-managers, that Padilla Speer Beardsley is an inclusive, rather than competitive or divisive, environment. This finding supports the literature associated with group behavior and group decision-making. How information-sharing behavior influences group decision-making is an important question. Group decisions tend to focus on shared information, and shared information is more influential on group judgments than information held by only one person (Gigone & Hastie, 1993; Larson et al., 1994). For non-managers looking to move into leadership roles within a high-performing public relations agency, it may be especially important to share information freely with colleagues, and therefore build a sense of trust and respect with colleagues. Of course, agency culture must be such that a non-manager does not fear sharing information with others, or does



not get positive reinforcement by withholding information from others. The day-to-day experience must reflect an environment that is safe and supportive.

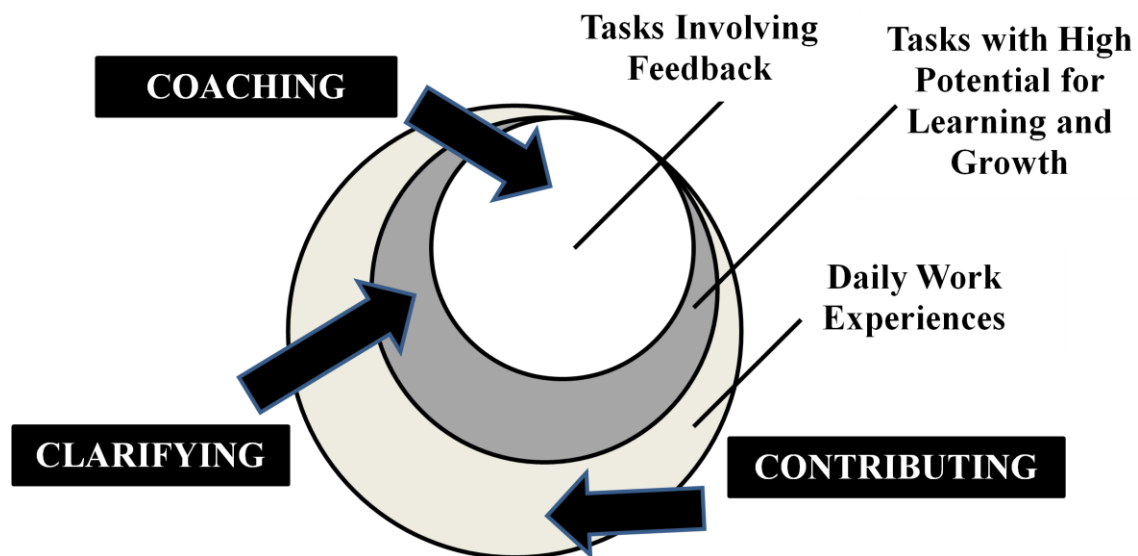
### ***Working hard and speaking up: Leadership development through daily experience***

The last of the four research questions for this study sought to determine how the phenomenon of leadership development is experienced by professionals through their day-to-day work in a high-performing public relations agency. Aspects of individuals' daily work experience, observed within Padilla Speer Beardsley and then compared to the prior research of Tesluk & Jacobs (1988), help deepen the understanding of what agency experience means, or might mean, to emerging leaders.

#### **Day-to-day work experience**

Non-managers at Padilla Speer Beardsley, as noted in the prior chapter, handle a heavy workload and a diverse spectrum of responsibilities, two-thirds of which provide a high potential for learning and growth. More than half of all tasks, regardless of complexity, involve feedback or direction from a formal leader. Viewed in the context of the agency experience model, we would see that leadership development comes from work experience that, by and large, provides learning and growth and/or is coupled with feedback from a formal leader (see Figure 5.3). Leaders play a direct hand in leadership development by providing project direction and individualized feedback, of course, but also by clarifying situations that arise, so that non-managers can press forward to positive resolution. When leaders contribute to new projects, their impact seems to be more about keeping a team functional than it is helping a non-manager grow and develop. However, it is logical to believe that non-managers may learn simply by witnessing the behavior of formal leaders as they intervene to assist with planning or to rally colleagues to action.

**Figure 5.3 Leadership Development within a High-performing Agency, as Experienced through Day-to-day Work**



One dimension difficult to study was task density, or tasks being performed by an individual that are successively more challenging (Tesluk & Jacobs, 1988). This characteristic was nearly impossible to detect through observations and interviews. The only way to have monitored this would have been to observe one specific employee over an extended period of time. Even then, this would have only provided an idea of one employee's experience, which may or may not have been representative of other employees within the agency. Likewise, it was difficult in interviews to get respondents to talk about, or even identify, task density. Employees in an agency setting are switching tasks so frequently that recall of specific tasks, and the sequencing of these tasks, is difficult at best.

Still, what has been learned about individual work experience within a high-performing public relations agency is that it offers depth and breadth of experience, coupled with rich feedback from experienced professionals in management roles. Additionally, as noted in the prior chapter, more than two-thirds of the observed interactions between formal leaders and non-managers involve tasks that have a high potential for learning for the non-manager. These

findings support McCall's (1988) categories, including influencing others without having the authority to do so; creating or implementing some sort of change within the work group; or temporarily assuming a high level of responsibility. Knowing that non-managers within a public relations agency are stretched and tested so much in their individual roles begins to inform an understanding of how collaboration happens and what it may mean for leadership development. Agency experience may, indeed, be unique to the work experience of public relations professionals in other organizations, such as corporations, nonprofits, and government agencies. This would need to be further explored and tested. Regardless, this case study indicates that agency experience provides high potential for learning and growth through daily work experiences, and does so within a safe, supportive environment guided, though not tightly controlled, by formal leaders. Agency experience emerges as a truly dynamic model for leadership development.

#### Psychological safety

Findings shared in the previous chapter point to the fact that, at Padilla Speer Beardsley, nearly all participants and respondents feel safe speaking their minds, though very few feel comfortable taking risks. There is a high degree of comfort and confidence as it relates to sharing one's opinions and ideas, but a significantly lower degree of comfort and confidence relative to taking action without supervisory approval. An ideal culture for individual learning and growth would foster both dimensions and provide a strong sense of security. To be precise, the concept of psychological safety is exemplified by an environment in which people feel comfortable raising their voices in contrast to group-held beliefs, and taking risks, which means taking action without supervisory approval (Edmonson, 1999). Voice-raising was clearly evident at Padilla Speer Beardsley; risk-taking was not.

It is important to note that risk aversion may simply be part of Padilla Speer Beardsley, and not a sign of any sort of dysfunction. Indeed, the agency has been a strong, steady performer across multiple industries for five decades, which likely reflects a more conservative approach than, say, a start-up niche firm specialized in working solely with fast-paced, highly entrepreneurial clients.

Still, what clearly fosters a great deal of learning and development for non-managers within Padilla Speer Beardsley is an environment where it is safe to speak one's mind. Applying this to the process model of agency leadership, we can view developmental feedback not simply as a one-way process, from formal leader to non-manager, but rather an ongoing, two-way and at times multi-way conversation among the non-manager, his or her formal leader, other formal leaders who serve as supervisors and mentors, and even other non-management peers. This "circle of support" becomes a hub for the growth and development of non-managers. They become the central point of activity within an account team – taking responsibility, embracing direction, resolving situations, and working toward desired outcomes – all while exchanging feedback with others involved at various stages of the life cycle of a project. Those others may be formal leaders, non-managers, or even clients outside of the agency itself. All of this activity becomes a continuous loop through which a non-manager gains experience, finds his or voice, and begins to grow along the path of leadership. Those new to the practice of public relations would benefit greatly from being in environments where there is a strong circle of support. Agency experience is one such environment, serving as a catalyst for helping non-managers develop essential competencies in coaching, contributing, and clarifying. Most importantly, they do so through day-to-day work experiences that test and challenge them, all within a safe, secure circle of support.

Economics, technology, and demographics will continue to change and challenge public relations practice for decades to come. It is the responsibility of contemporary public relations leaders to not only mentor emerging leaders, but also to create sustainable circles of support within their organizations for sound public relations practice and leadership development over the long-term. Economic pressures will continue to mount, and technology will continue to challenge the speed and accuracy with which an organization can respond to changing issues. What remains constant is the need to ensure the continued efficacy and growth of public relations practitioners into strong, solid leaders. The agency experience model, with its circle of support at the core, is an important first step toward taking more ownership of public relations as a leadership discipline.

#### Contingencies: Addressing matters of age, gender, and ethnicity

Daily work experiences are shaped largely by the people involved. This case study examines work experience inside a specific environment, that being a high-performing public relations agency. As noted in the previous chapter, the research site – the headquarters of Padilla Speer Beardsley, located in Minneapolis, Minn. – dimensions of age, gender, and ethnicity emerged as contingencies for the agency experience model. Nearly all of the agency employees are Caucasian, most are female, and, at the non-manager level, many have fewer than five years of full-time professional experience.

Traditionally, leaders are thought of as those who are older and have significant experience (Avolio et al., 2009). Technology puts an interesting twist on this notion, specifically as it relates to social media. The youngest and least-experienced employees at Padilla Speer Beardsley are able to contribute pro-actively and often significantly to client strategy through expertise in social media. In this aspect of public relations practice, non-managers at even the

lowest levels are able to make vital contributions, drawing upon their command of social media, an arena that is less familiar to many of the older and more-experienced agency professionals. Youth and social media, therefore, combine to create a unique opportunity for leadership development.

Gender adds an interesting aspect to this field research. Gender studies, including some work within the public relations field, suggest that women face more difficulties than men in getting leadership exposure, and may not speak their minds as openly if they are in the minority (Grunig, L., et al., 2001). This case study examines a predominantly female environment, and one in which most everyone, regardless of gender or level, feels comfortable speaking his or her mind. This dimension might be different in a male-dominated agency, but it does show the potential for leadership development.

Beyond social media, the agency environment helps propel the growth of new professionals. As noted earlier, they may move from entry-level work to the precipice of management in a span of just five years or less. Leadership competencies in an agency setting must often be gained long before the age of 30, which may be a shorter timeframe than other fields and settings. Being in a development-rich environment, such as the one at Padilla Speer Beardsley or another high-performing agency, certainly helps expedite the growth of a young professional.

America is growing increasingly diverse in ethnicity. The face of employment at Padilla Speer Beardsley does not readily reflect that fact. As noted in an earlier chapter of this dissertation, though, Padilla Speer Beardsley is not necessarily unique in its relative homogeneity; agency practitioners nationwide are less satisfied with the diversity on staff than their corporate counterparts (*PR Week Diversity Survey*, 2009). Regardless, might the agency

experience model fail a non-manager whose ethnic background is not adequately represented by the current formal leaders of the organization? Similarly, to what degree would a non-Caucasian in the non-management ranks feel comfortable speaking his or her mind about an issue or idea, even among colleagues at his or her own level? Psychological safety and high potential for growth might not be as evident. This case study unfortunately cannot answer these and other important questions. However, they should remain top-of-mind in future related studies.

### **Recommendations for Further Research**

This dissertation builds upon the existing body of public relations leadership literature, and creates several possible streams for further research. These streams relate to agency experience, leadership competencies, leadership process, and leadership development in the practice of public relations.

#### ***Agency experience***

The purpose of this dissertation was to begin to define agency experience as a leadership development process. Prior research has looked at public relations leadership largely as a role or as a set of competencies. This new agency experience model will help the industry begin to recognize and acknowledge the unique dynamics and dimensions of daily work experience within a high-performing public relations agency. Leadership and leadership development are interactive processes involving formal leaders and non-managers, often with non-managers having a great deal of latitude in taking on challenges rich with potential for learning and growth.

Before the agency experience model of leadership development can be adopted, though, more research must be done within other public relations agencies to test and refine the model. Collectively, these findings could also form a benchmark to compare with other types of organizations. How does agency experience compare with corporate communications

experience, for example? Or working in public relations for a government agency or nonprofit organization? All of these types of studies would help clarify the ways in which public relations professionals develop leadership competencies.

### ***Leadership competencies***

Similar to the work of Gregory (2008), this dissertation involved field observation of public relations leaders. More work should be conducted in this arena, especially because many existing studies of public relations leadership have relied on surveys administered to the leaders themselves and/or their colleagues. Self-reported behaviors have questionable value, as do the latent recollections of colleagues. An important study could be the evaluation of coaching, contributing, and clarifying competencies, as surfaced by this dissertation, and the construction of a competency index that could then be tested with quantitative methods such as a survey of formal leaders and non-managers, keeping in mind the limitations of self-reported survey responses. This would begin to give us a deeper understanding of the leadership aspects of public relations. No known studies have tracked both the competencies and the situations within which those competencies were displayed. Combining these two domains of observation into one study would provide tremendous insight into the leadership process, be that agency-specific or in another type of organization.

### ***Leadership process***

One outcome of this study is a process model of leadership within one high-performing public relations agency. The model was developed from a body of ad hoc observations and respondent interviews. One study that could be helpful would be a longitudinal analysis of the leadership process within a specific public relations account team. This type of study could help validate or refute aspects of the process model from this dissertation. Additional context could be



gleaned regarding how and when leaders intervene, and the ways in which team members react to such interventions. All of this learning would help inform our understanding of leadership and group behavior within the agency environment.

### ***Leadership development***

Finally, the most essential study that could stem from this dissertation is an in-depth examination of leadership development in the agency setting, specifically field research on the points at which leaders intervene and the form that the feedback process takes at these and other points in the life cycle of a project. Prior studies have not examined public relations leadership as an interactive process. There is a significant opportunity to investigate and understand how a culture of leadership and accountability can be developed and fostered within a public relations team, beyond an organization simply designating someone a formal leader based on that person's perceived leadership competencies. There are many situations and interactions between formal leaders and non-managers that could, and should, be studied and better understood. The agency environment is particularly helpful for this type of examination because the very nature of agency work creates many situational contexts ripe for leadership and leadership development among formal leadership and non-managers alike.

It would be helpful to know, for example, the typical reasons why a leader becomes engaged, even if briefly, in a team's or individual's work, and what the non-managers gain, or do not gain, from such interaction. Likewise, if psychological safety is ideal for growth and development, it would help to further analyze how and why non-managers speak their minds, and how formal leaders should respond in order fuel further growth. A related study would involve tracking agency professionals during the first few years of public relations practice, providing a longitudinal view of how leadership competencies develop over time. Such a study

could involve participants working for different agencies and for different types of clients, thereby diversifying the study population.

### ***Other considerations***

For this study, a high-performing culture was defined as an agency that had performed well financially over a five-year period. This definition may not be narrow enough when it comes to analyzing account team behavior within an agency. Not all account teams perform at a high level. Future studies should take into consideration the need to identify not only high-performing agencies, but also the high-performing account teams within those agencies. This may be determined by profitability, efficiency, client satisfaction, or a balanced scorecard that tracks and compares these and/or other dimensions of team performance.

Likewise, future studies should examine more closely the ownership structure of the agency. The research site for this dissertation is employee-owned, yet that is not the norm among most independent agencies in the United States, which are more often controlled by a handful of partners at the senior level.

Finally, and as noted earlier in this chapter, further research on agency experience as a leadership development process should pay heed to the ethnicity and gender of individual participants. These factors were noted within this dissertation, though not deeply investigated. Much could be learned from structuring future studies in a manner that takes such variables into greater consideration.

## **Conclusion**

The purpose of this study was to define public relations agency experience as a leadership development phenomenon. Prior research about public relations leadership has focused on roles and competencies. This study sought to extend the literature by analyzing agency leadership as a process and examining agency experience as a method for leadership development for professionals new to the field.

Findings revealed that agency leadership involves coaching teams and individuals, contributing to strategic direction, and clarifying situations that inevitably develop during the course of client work. Leadership development for non-managers comes from handling a heavy workload and diverse, often-complex responsibilities, receiving feedback on more than half of all tasks, and raising one's voice throughout the process. A non-manager working in a high-performing public relations agency typically moves from novice to a step from formal management within five years.

The most significant finding from this study is that agency experience is, indeed, a dynamic process. Leadership and leadership development are intertwined in the agency setting. Leadership is not a static set of competencies, nor is leadership development a top-down, one-way form of feedback. As leaders intervene in day-to-day work, they do so as coaches, contributors, and points of clarification not only for direct reports but for multiple employees at the non-management level. Meanwhile, non-managers take responsibility for projects, share information openly with peers, and raise their voices with formal leaders to ensure client outcomes are met. The study points clearly to leadership and leadership development, within the public relations agency environment, as interactive, highly integrated processes that continually evolve – and ultimately improve the effectiveness of all involved.

## APPENDIX 1: IRB APPROVAL



THE UNIVERSITY  
of NORTH CAROLINA  
at CHAPEL HILL

OFFICE OF HUMAN RESEARCH ETHICS  
Medical School Building 52  
Mason Farm Road  
CB #7097  
Chapel Hill, NC 27599-7097  
(919) 966-3113  
Web site: [ohre.unc.edu](http://ohre.unc.edu)  
<https://my.research.unc.edu> for IRB status  
Federalwide Assurance (FWA) #4801

To: David Remund  
Journalism/Mass Communication  
CB:3365

From: Behavioral IRB

Authorized signature on behalf of IRB

Approval Date: 9/29/2010  
Expiration Date of Approval: 9/28/2011

RE: Notice of IRB Approval by Expedited Review (under 45 CFR 46.110)  
Submission Type: Initial  
Expedited Category: 7.Surveys/interviews/focus groups,6.Voice/image research recordings  
Study #: 10-1702

Study Title: Agency Experience: A Case Study of Leadership Development within a High Performing Public Relations Agency

This submission has been approved by the above IRB for the period indicated. It has been determined that the risk involved in this research is no more than minimal.

### Study Description:

Purpose: To identify and analyze the daily, interactive work experiences of public relations professionals working in a high-performing agency, and the leadership development they may experience while working within such an environment.

Participants: 100 employees of a public relations agency in a Midwestern city, identified through longitudinal financial analysis as one of the highest performing public relations agencies in the United States.

Procedures: Participant-observations and semi-structured interviews will be conducted.

### Investigator's Responsibilities:

Federal regulations require that all research be reviewed at least annually. It is the Principal Investigator's responsibility to submit for renewal and obtain approval before the expiration date. You may not continue any research activity beyond the expiration date without IRB approval. Failure to receive approval for continuation before the expiration date will result in automatic termination of the approval for this study on the expiration date.

When applicable, enclosed are stamped copies of approved consent documents and other

page 1 of 2

recruitment materials. You must copy the stamped consent forms for use with subjects unless you have approval to do otherwise.

You are required to obtain IRB approval for any changes to any aspect of this study before they can be implemented (use the modification form at [ohre.unc.edu/forms](http://ohre.unc.edu/forms)). Any unanticipated problem involving risks to subjects or others (including adverse events reportable under UNC-Chapel Hill policy) should be reported to the IRB using the web portal at <https://irbis.unc.edu/irb>.

Researchers are reminded that additional approvals may be needed from relevant "gatekeepers" to access subjects (e.g., principals, facility directors, healthcare system).

This study was reviewed in accordance with federal regulations governing human subjects research, including those found at 45 CFR 46 (Common Rule), 45 CFR 164 (HIPAA), 21 CFR 50 & 56 (FDA), and 40 CFR 26 (EPA), where applicable.

\*\*\*\*\*  
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\*\*\*\*\*

CC:  
Lois Boynton, Journalism/mass Communication

**APPENDIX 2:**  
**FINANCIAL ANALYSIS OF HIGH-PERFORMING AGENCIES, 2005-2009 (N=67)**

<b>Agency Name</b>	<b>5-Year Avg</b>	<b>2009</b>	<b>2008</b>	<b>2007</b>	<b>2006</b>	<b>2005</b>
<b>5W</b>	<b>145,577</b>	165,095	150,880	146,607	143,392	121,909
<b>Ackermann</b>	<b>138,246</b>	131,432	143,943	138,384	143,678	133,794
<b>Allison &amp; Partners</b>	<b>126,594</b>	183,278	130,821	108,827	110,588	99,455
<b>Anne Klein</b>	<b>118,394</b>	125,254	109,410	93,169	152,255	111,884
<b>APCO Worldwide*</b>	<b>230,350</b>	233,463	241,245	236,160	215,960	224,921
<b>Atomic</b>	<b>123,904</b>	132,124	136,098	117,391	120,833	113,074
<b>Bader Rutter</b>	<b>124,411</b>	141,935	140,306	108,231	115,415	116,168
<b>Barkley*</b>	<b>177,990</b>	166,433	202,411	194,750	185,463	140,894
<b>Bender/Helper</b>	<b>116,254</b>	120,277	132,157	131,840	112,045	84,949
<b>Bridge Global</b>	<b>115,172</b>	121,017	132,386	105,370	101,482	115,604
<b>Capstrat</b>	<b>146,110</b>	155,761	147,058	147,488	131,104	149,137
<b>Catapult</b>	<b>130,539</b>	119,199	104,666	135,615	132,017	161,200
<b>Cooney/Waters*</b>	<b>265,257</b>	274,312	275,254	265,349	269,914	241,457
<b>CooperKatz</b>	<b>148,052</b>	132,296	172,293	144,329	147,979	143,362
<b>Coyne</b>	<b>120,012</b>	133,802	136,470	99,347	116,631	113,811
<b>Crosby</b>	<b>151,547</b>	187,851	163,152	149,043	137,687	120,003
<b>Davies*</b>	<b>268,244</b>	280,167	315,199	270,455	254,348	221,053
<b>Edelman</b>	<b>155,749</b>	168,224	151,618	153,644	149,479	155,782
<b>Eric Mower &amp; Assoc*</b>	<b>167,163</b>	167,517	163,117	193,851	160,501	150,829
<b>Fahlgren Mortine*</b>	<b>159,292</b>	169,154	154,958	161,513	161,436	149,398
<b>Formula</b>	<b>111,425</b>	126,128	122,256	104,199	107,335	97,207
<b>French/West/Vaughan</b>	<b>154,837</b>	172,311	161,850	154,944	145,576	139,502
<b>G.S. Schwartz*</b>	<b>183,623</b>	188,889	225,000	171,143	171,114	161,971
<b>Gibbs &amp; Soell*</b>	<b>173,286</b>	180,443	185,572	173,512	166,296	160,609

<b>Hunter*</b>	<b>159,407</b>	161,737	160,526	162,017	161,602	151,154
<b>Jackson Spalding</b>	<b>117,899</b>	123,333	116,666	113,810	123,256	112,431
<b>Jasculca/Terman</b>	<b>110,205</b>	103,815	130,188	118,439	98,092	100,493
<b>JMPR</b>	<b>131,673</b>	134,439	146,012	117,673	126,532	133,709
<b>JS2</b>	<b>120,952</b>	149,841	140,345	110,864	107,296	96,413
<b>Kaplow*</b>	<b>160,840</b>	188,000	174,137	172,500	153,273	116,290
<b>Lambert, Edwards &amp; Assoc</b>	<b>139,126</b>	123,798	151,698	149,810	146,395	123,930
<b>Landis</b>	<b>108,556</b>	95,175	94,958	125,305	114,782	112,558
<b>LanePR</b>	<b>120,003</b>	123,105	123,428	121,506	121,267	110,711
<b>LaunchSquad</b>	<b>105,673</b>	101,327	121,123	101,889	107,278	96,750
<b>Makovsky*</b>	<b>189,127</b>	204,000	222,000	196,617	163,089	159,930
<b>Martino Flynn*</b>	<b>197,383</b>	187,808	183,284	180,889	197,423	237,509
<b>Matter</b>	<b>116,023</b>	111,842	114,864	116,667	115,909	120,833
<b>McNeely Pigott &amp; Fox</b>	<b>104,700</b>	94,538	121,602	117,983	94,495	94,880
<b>Moore*</b>	<b>165,854</b>	194,442	154,037	133,515	159,378	187,896
<b>O'Keefe &amp; Co.</b>	<b>141,355</b>	132,359	149,352	145,670	132,727	146,667
<b>Padilla Speer Beardsley</b>	<b>145,583</b>	155,054	139,931	155,159	148,647	129,125
<b>PainePR*</b>	<b>183,265</b>	188,327	175,506	184,265	185,175	183,053
<b>PAN</b>	<b>102,175</b>	101,960	109,673	103,030	95,585	100,629
<b>PCG Campbell</b>	<b>138,814</b>	138,456	122,898	149,272	137,248	146,196
<b>Peppercom*</b>	<b>159,425</b>	179,020	176,080	166,427	143,033	132,563
<b>Perry*</b>	<b>161,735</b>	183,051	163,673	205,615	118,872	137,465
<b>Qorvis*</b>	<b>328,777</b>	387,383	363,740	354,616	281,176	256,972
<b>Rasky Baerlein*</b>	<b>221,550</b>	217,296	240,558	228,920	220,911	200,066
<b>RF/Binder*</b>	<b>171,745</b>	165,714	170,270	176,812	167,522	178,407
<b>Ron Sachs*</b>	<b>172,675</b>	226,260	174,976	147,946	172,587	141,605
<b>Ruder Finn*</b>	<b>204,934</b>	207,810	215,851	218,429	196,108	186,471
<b>Schneider</b>						

	<b>130,732</b>	128,182	150,434	168,000	94,833	112,209
<b>Schwartz</b>	<b>143,766</b>	146,112	162,069	144,790	139,094	126,767
<b>Shelton Group</b>	<b>125,829</b>	154,346	118,729	106,748	126,304	123,019
<b>Singer</b>	<b>150,001</b>	99,787	116,098	96,288	126,304	311,529
<b>Spring O'Brien*</b>	<b>215,158</b>	257,390	253,568	190,985	201,177	172,669
<b>Stanton*</b>	<b>170,414</b>	98,571	196,904	193,437	192,892	170,266
<b>Taylor*</b>	<b>197,001</b>	237,754	205,918	196,855	193,624	150,854
<b>Text 100*</b>	<b>180,054</b>	198,958	191,556	173,100	180,060	156,598
<b>The Kotchen Group</b>	<b>150,776</b>	155,945	177,275	155,182	171,601	93,875
<b>The Powell Group</b>	<b>137,107</b>	246,529	115,853	110,774	96,832	115,546
<b>The Rogers Group</b>	<b>145,212</b>	178,118	119,354	140,675	139,077	148,836
<b>Travers Collins</b>	<b>155,036</b>	174,080	166,095	171,220	145,615	118,171
<b>Trevelino/Keller</b>	<b>151,297</b>	181,167	165,126	152,199	134,668	123,323
<b>Waggener Edstrom*</b>	<b>167,311</b>	219,607	158,872	146,230	166,923	144,923
<b>Widmeyer</b>	<b>157,530</b>	150,635	154,248	145,052	146,047	191,667
<b>Williams Mills*</b>	<b>182,695</b>	217,139	174,884	219,512	177,769	124,171
<b>Zeno Group</b>	<b>136,232</b>	103,419	136,693	132,904	131,474	176,670
<b>AVERAGE</b>	<b>156,289</b>					
*=-exceeds average						



### **APPENDIX 3: MESSAGE TO PROSPECTIVE RESEARCH SITES**

This fall, I will conduct the first known study of “agency experience,” or the leadership development that can come from working within a public relations agency. I am writing to invite your agency’s participation because of its strong performance during the recent economic crisis and since the rise of social media. Yours is one of 25 independently owned agencies from across the U.S. identified as the strongest potential research sites for this project.

This study is part of a doctoral dissertation being supervised by a panel of five experts, including an organizational behavior scholar from Harvard University and a former executive from *The Wall Street Journal*. I bring 20 years of professional experience in public relations to this project, including prior roles at two agencies in the Midwest, as well as leadership roles within three Fortune 250 corporations. Additionally, I am nationally accredited by the Public Relations Society of America.

The study will involve in-depth field research. Specifically, I wish spend at least 2-3 weeks within a high-performing public relations agency between October 1 and December 15, 2010. As a participant-observer, I offer to work – without pay or benefits – as a writer/editor/assistant while observing the work experiences of colleagues, particularly those who are new to the profession (i.e. fewer than five years of experience in public relations). These notes will be supplemented by interviews.

Participant-observation has been used successfully by Suzanne Horsley and other established scholars to study public relations practice. My specific approach has been adapted from a model of work experience developed in 1998 by Paul Tesluk and Rick Jacobs, researchers from Tulane and Pennsylvania State, respectively.

My status as a researcher will be disclosed to your employees prior to the start of the study. The confidentiality of individual employees will be guaranteed. (Pseudonyms or other means of preserving confidentiality will be used.) The identity of your agency can also be protected, should you wish. The research protocol will be reviewed by the UNC Institutional Review Board, and your agency, prior to implementation. In addition, I will sign any non-disclosure agreements typically required by your agency of salaried or contract employees.

Ultimately, the study will identify best practices for fostering public relations leadership through day-to-day work experience. The findings should serve as a model for agencies nationwide, and help corporations and other organizations that desire to build public relations departments which perform like in-house agencies. Ultimately, my goal is to expand the industry's knowledge of effective organizational design and on-the-job professional development.

There will be no cost to your agency for participating as a research site. Funding is already in place to cover all necessary expenses, such as transportation, meals, and lodging. In addition, you will receive my professional services at no cost. If mutually agreeable, we can promote your agency's involvement in the study once the findings are ready for release in 2011.

-continued-

Following is a brief timeline of next steps in this project:

- July 2010: Agencies confirm their initial interest in participating
- August 2010: Interested agencies review the research design proposal, offer input, and commit to being involved, if selected
- September 2010: Selected agencies notified and formally invited to participate; UNC officials review and approve the final research design
- October through December 2010: Research conducted on-site for at least 2-3 weeks within each participating agency

Thank you for considering this research request. I will follow-up with you in the next few days to gauge your initial interest.

Sincerely,

David L. Remund, APR  
Roy H. Park Fellow and Doctoral Student  
E-mail: [remund@unc.edu](mailto:remund@unc.edu)  
Phone: (919) 357-6798

Adviser: Lois Boynton, Ph.D.  
E-mail: [lboynton@email.unc.edu](mailto:lboynton@email.unc.edu)  
Phone: (919) 843-8342

**APPENDIX 4:**  
**FOLLOW-UP MESSAGE TO PROSPECTIVE RESEARCH SITES**  
**RE: PROJECT DESIGN**

Last month, we were in touch regarding my doctoral dissertation. My project is the first known study of “agency experience,” or the leadership development that can come from working within a high-performing public relations agency. Attached is a copy of the proposed project design for your review.

Your agency is one of only three independently owned agencies from across the U.S. still in consideration to serve as the project site this fall. Twenty-five similar agencies nationwide were originally identified as high-performing given strong financial performance during the recent economic downturn and since the rise of social media.

Please share your feedback and questions about the project design by August 30, 2010. You may do so via phone (919-357-6798) or e-mail (remund@unc.edu). Your comments and suggestions will be kept confidential; feedback from all responding agencies will be aggregated and recurring themes will be addressed in the final version of the project design.

Shortly after September 1, 2010, I will reach a decision about which project site will be most feasible for the study. I will contact the selected agency, as well as the two agencies not selected. My decision will be based on accessibility, available resources, and related factors. My on-site work may begin as early as September 13, 2010, pending final approval from the UNC Institutional Review Board.

Following are answers to initial questions that have been raised:

- Will any other agencies in our area be participating? No, only one agency will be selected to participate in this study
- How much time will this require of our staff? There will be a few hours of time needed from a supervisor, prior to the start of the study, in order to help me get acclimated to the agency, team, and operations. During the study itself, no time will be required of the staff, other than a one-time, 20-minute, private interview with each staff member who wishes to grant a confidential interview.
- What will the cost be to our agency? There will be no cost to your agency for participating as a project site. Funding is already in place to cover my expenses, such as transportation, meals, and lodging.
- How will findings from the study be used? My goal is to expand the industry’s knowledge of effective organizational design and on-the-job professional development. The final report will take the form of a book-length dissertation. Findings from the study may be adapted for presentation at academic and professional conferences, for publication in academic and professional journals, and for inclusion in other education, training, and development resources such as textbooks, workshops, and online case study repositories.

Thank you, in advance, for your feedback on the proposed project design.

-continued-

Sincerely,

David L. Remund, APR  
Roy H. Park Fellow and Doctoral Student  
E-mail: [remund@unc.edu](mailto:remund@unc.edu)  
Phone: (919) 357-6798

Adviser: Lois Boynton, Ph.D.  
E-mail: [lboynton@email.unc.edu](mailto:lboynton@email.unc.edu)  
Phone: (919) 843-8342

**APPENDIX 5:**  
**NOTIFICATION MESSAGE FOR SELECTED AGENCY**

Thank you for your feedback regarding the proposed project design for my doctoral dissertation. The project is the first known study of “agency experience,” or the leadership development that can come from working within a high-performing public relations agency.

Twenty-five similar agencies nationwide were originally identified as prospective project sites for the study. This list was compiled based upon the agencies’ strong financial performance during the recent economic downtown and since the rise of social media.

Please know that your agency has (been selected to serve as the project site this fall. The project site decision was based on accessibility, available resources, and related factors.

The on-site work may begin as early as September 13, 2010, pending final approval from the UNC Institutional Review Board. I will follow this message with a phone call, so that we may begin the planning process.

(for the non-selected sites)

Thank you very much for your enthusiasm about this project. Although we will not be working together on this initial study, I hope that we might be able to work together on similar projects in the future.

Sincerely,

David L. Remund, APR  
Roy H. Park Fellow and Doctoral Student  
E-mail: remund@unc.edu  
Phone: (919) 357-6798

Adviser: Lois Boynton, Ph.D.  
E-mail: lboynton@email.unc.edu  
Phone: (919) 843-8342

**APPENDIX 6:  
FOLLOW-UP MESSAGE FOR SELECTED AGENCY  
RE: IRB APPROVAL**

Thank you, again, for agreeing to serve as the project site for my doctoral dissertation. The project is the first known study of “agency experience,” or the leadership development that can come from working within a high-performing public relations agency.

This short note serves to confirm that the UNC Institutional Review Board (IRB) has formally approved the project. I have attached a copy of the approved UNC-IRB application for your reference.

All research on human volunteers conducted by UNC faculty and students is reviewed by the UNC-IRB, a committee that works to protect your rights and welfare. If you have questions or concerns about your rights you may contact, anonymously if you wish, the IRB at 919-966-3113 or by e-mail to [IRB\\_subjects@unc.edu](mailto:IRB_subjects@unc.edu). If you contact the IRB, please refer to study number (insert IRB code).

I am eager to begin my project at your offices on (insert date). Please know that I will follow this message with a phone call, so that we may confirm next steps.

Sincerely,

David L. Remund, APR  
Roy H. Park Fellow and Doctoral Student  
E-mail: [remund@unc.edu](mailto:remund@unc.edu)  
Phone: (919) 357-6798

Adviser: Lois Boynton, Ph.D.  
E-mail: [lboynton@email.unc.edu](mailto:lboynton@email.unc.edu)  
Phone: (919) 843-8342

**APPENDIX 7:**  
**NOTIFICATION MESSAGE FOR NON-SELECTED AGENCIES**

Thank you for your feedback regarding the proposed research design for my doctoral dissertation. The project is the first known study of “agency experience,” or the leadership development that can come from working within a high-performing public relations agency.

Twenty-five similar agencies nationwide were originally identified as prospective research sites for the study. This list was compiled based upon the agencies’ strong financial performance during the recent economic downturn and since the rise of social media.

Please know that your agency has not been selected to serve as the research site this fall. The research site decision was based on accessibility, available resources, and related factors.

Thank you very much for your enthusiasm about this project. Although we will not be working together on this initial study, I hope that we might be able to work together on similar research projects in the future.

Sincerely,

David L. Remund, APR  
Roy H. Park Fellow and Doctoral Student  
E-mail: remund@unc.edu  
Phone: (919) 357-6798

Adviser: Lois Boynton, Ph.D.  
E-mail: lboynton@email.unc.edu  
Phone: (919) 843-8342

**APPENDIX 8:  
OBSERVATION GUIDE**

<b>Day / Time</b>					
<b>Location</b>					
<b>Respondents Involved</b>					
<b>What Happened</b>					
<b>Interactions</b>					
<b>Researcher's Insight</b>					
<b>Impact to the primary individual involved</b> <i>(circle all)</i>	Task frequency	Task variety	Task complexity	Task Density	Timing (explain):
<b>Evident behaviors within the group</b> <i>(circle all)</i>	Socialization	Information -sharing	Voice-raising	Risk-tasking	
<b>A potentially powerful development experience?</b> <i>(circle all)</i>	Creating change	High level of responsibility		Influencing without authority	



**APPENDIX 9:  
SEMI-STRUCTURED INTERVIEW GUIDE**

<b>Day / Time</b>		
<b>Location</b>		
<b>Subject</b>	Number:	Title/Tenure:
<b>Describe your role within the agency.</b>	<u>Probes:</u> <ul style="list-style-type: none"> <li>• What is your job title?</li> <li>• How long have you been with this agency? In this role?</li> <li>• How have you learned your role here?</li> </ul>	
<b>Tell me about a typical workday.</b>	<u>Probes*:</u> <ul style="list-style-type: none"> <li>• How frequently per hour/day are you working on a different task?</li> <li>• How varied are the tasks you perform? Provide examples on the spectrum from administrative to strategic.</li> <li>• Would you consider most of your tasks complex? Why?</li> <li>• Are you completing tasks more complex now than when you first started here? Explain.</li> <li>• Are you provided with directions or feedback relative to your day-to-day tasks? If so, how?</li> </ul> <p>[*Tailor accordingly when interviewing those in management roles. Ask them to answer in terms of the junior members of their teams.]</p>	
<b>Talk a little about how you show leadership in your role.</b>	<u>Probes:</u> <ul style="list-style-type: none"> <li>• How is your level of responsibility compared to your past experience in the field of PR? To others in similar roles here at this agency?</li> <li>• Do you consider yourself a leader? If so, why? If not, why not?</li> <li>• Have you helped drive change of any sort (i.e. workflow processes, client strategy, relationship management, etc.)? Describe.</li> <li>• Is it necessary for you to influence others even though you may not have formal authority over them? How do you go about this?</li> <li>• Do you feel safe raising your voice here? How about taking risks? Why or why not?</li> <li>• What would you change about this environment, if anything, to make it a more positive or productive place to work?</li> <li>• What brought you here? What keeps you here?</li> </ul>	
<b>As I continue studying what day-to-day work experience is like within a high-performing agency, is there anything else I should keep in mind or be aware of?</b>		

## **APPENDIX 10: CONSENT FORM**

### **University of North Carolina-Chapel Hill Consent to Participate in a Research Study**

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**IRB Study #10-1702**

**Consent Form Version Date:** September 25, 2010

**Title of Study:** Agency Experience: A Case Study of Leadership Development within a High-performing Public Relations Agency

**Principal Investigator:** David Remund

**UNC-Chapel Hill Department:** Journalism and Mass Communication

**Phone number:** (919) 357-6798

**Email Address:** remund@unc.edu

**Faculty Advisor:** Lois Boynton, Ph.D.

**Phone number:** (919) 843-8342

**Email Address:** lboynton@email.unc.edu

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#### **What are some general things you should know about research studies?**

You are being asked to take part in a research study. To join the study is voluntary. You may refuse to join, or you may withdraw your consent to be in the study, for any reason, without penalty.

Research studies are designed to obtain new knowledge. This new information may help people in the future. You may not receive any direct benefit from being in the research study. There also may be risks to being in research studies.

Details about this study are discussed below. It is important that you understand this information so that you can make an informed choice about being in this research study.

You will be given a copy of this consent form. You should ask the researcher named above any questions you have about this study at any time.

#### **What is the purpose of this study?**

Having worked within a public relations agency – in other words, having gained “agency experience” – has long been a marketable asset for public relations practitioners looking to advance their careers. Little is known, however, about the workplace experience of public relations agency professionals. This research project is an exploratory qualitative study, specifically designed to begin the process of defining what “agency experience” means within the public relations industry. Specifically, the project is intended to identify and analyze the daily, interactive work experiences of public relations professionals working in a high-performing agency, and the leadership development they may experience while working within such an environment.

#### **How many people will take part in this study?**

If you decide to be in this study, you will be one of approximately 100 people in this research study.

**How long will your part in this study last?**

Observations will happen the next three weeks, during the course of each work day. One-on-one interviews will be held during the second week of the study. Every effort will be made to keep each interview to about 20 minutes in length, though a few interviews may last as long as 60 minutes.

**What will happen if you take part in the study?**

If you agree to be part of the observation process, your behaviors, actions and words may be noted, using a generic job title (and not your real name). Observations will happen randomly, and you do not need to do anything special to participate, other than perform your typical work function.

If you agree to be interviewed, what you express will be recorded. Only the researcher will have access to the recording, and in all project documentation and the final case study, only generic job titles (and not real names) will be used to denote the type of interview. Interviews will be scheduled during the second week of the research period.

**What are the possible benefits from being in this study?**

You may not benefit personally from being in this research study. However, your participation will help the industry begin to define and understand what “agency experience” truly means. This knowledge will provide a foundation for further research about leadership development within the public relations industry.

**What are the possible risks involved from being in this study?**

Risks to subjects are limited to breach of confidentiality. Confidentiality protection measures will minimize such risks. There may be limited risk of discomfort for subjects as they are observed and/or interviewed. You will have the option to decline consent to be observed and/or interviewed. If you decide to participate, you may voluntarily end your participation at any time, without any questions or consequences.

**How will your privacy be protected?**

Participants will not be identified in any report or publication about this study. Although every effort will be made to keep research records private, there may be times when federal or state law requires the disclosure of such records, including personal information. This is very unlikely, but if disclosure is ever required, UNC-Chapel Hill will take steps allowable by law to protect the privacy of personal information. In some cases, your information in this research study could be reviewed by representatives of the University, research sponsors, or government agencies for purposes such as quality control or safety.

Observation notes and audio tapes of interviews will be kept in a locked file, in a locked office, for three years following the completion of the study, as required by federal regulations. The researcher is the only person with possession of a key for the file cabinet in which the notes and tapes will be stored. At the conclusion of the three-year archival period, the observation notes will be shredded and the audio tapes will be destroyed.

Recording is necessary for the interviews. However, the recorder may be turned on and off during the interview, at your request, should there be certain information or insights you do not wish to have recorded.

**What if you want to stop before your part in the study is complete?**

You can withdraw from this study at any time. The researcher also has the right to stop the project or your participation at any time.

**Will you receive anything for being in this study?**

You will not receive anything for taking part in this study.

**Will it cost you anything to be in this study?**

There will be no costs for being in the study

**What if you have questions about this study?**

You have the right to ask, and have answered, any questions you may have about this research. If you have questions, complaints or concerns, you should contact the researcher listed on the first page of this form.

**What if you have questions about your rights as a research participant?**

All research on human volunteers is reviewed by a committee that works to protect your rights and welfare. If you have questions or concerns about your rights as a research subject, or if you would like to obtain information or offer input, you may contact the Institutional Review Board at 919-966-3113 or by email to IRB\_subjects@unc.edu.

-----  
**Title of Study:** Agency Experience: A Case Study of Leadership Development within a High-performing Public Relations Agency

**Principal Investigator:** David Remund

**Participant's Agreement:** I have read the information provided above. I have asked all the questions I have at this time. I voluntarily agree to participate in this research study.

\_\_\_\_\_  
Signature of Research Participant

\_\_\_\_\_  
Date

\_\_\_\_\_  
Printed Name of Research Participant

\_\_\_\_\_  
Signature of Research Team Member Obtaining Consent

\_\_\_\_\_  
Date

\_\_\_\_\_  
Printed Name of Research Team Member Obtaining Consent

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