

Shadow Structure in Higher-Level Military Staff Work

A Qualitative Study

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Carl Jung¹ refers to the suppressed, dark side of individuals' behaviour as "the shadow". An individual's "shadow self" is often described as being negative, including behaviours and cognitions which are not accepted by an individual's own perception of her/himself.² However, Johnson³ interprets the personal shadow as including both positive and negative aspects, more accurately being described as a summation of subconscious qualities.

The idea of the personal shadow has also metamorphosed into organizational settings.⁴ Bowles⁵ states that truly understanding organizations depends on observing the interplay of the rational and irrational forces which determine organizational behaviour. He specifies that those in power constitute the organizational shadow, thus highlighting the important role of leadership. Koldodziejewski⁶ notes that organizations are often not prepared to understand and cope with organization shadows ; thus, just as individuals split off undesirable aspects of themselves, so do organizations.

Military organizations are historically seen as strictly hierarchical power structures which follow top-down chain of command procedures.⁷ One could say that there is a focus on the formal and rational side of the organization. However, they are also criticized as being overly bureaucratic, which can result in slow processes in rapidly changing environments⁸.

Additionally, Blass and Ferris⁹ point out that the military is one of the only organizations that do all of their leadership recruitment internally, led by higher-level leaders who spot potential from subordinates that appear to portray strong organizational values. This can also lead to competition and the playing of "politics" in order for individuals to use informal power to achieve personal or organizational goals.¹⁰

¹ Jung, 1953, 1959.

² Talley, 1987.

³ Johnson, 1991.

⁴ Bowles, 1991 ; Coleman 1992 ; Kolodziejewski, 2004.

⁵ Bowles, 1991.

⁶ Koldodziejewski, 2004.

⁷ Andreski, 1954 ; Alvinus, 2014.

⁸ Andreski, 1954 ; Jamali *et al.*, 2006 ; Alvinus, 2014.

⁹ Blass & Ferris, 2007.

¹⁰ Hackman & Johanson, 2013.

Gordon's review of power influences was one of the only relevant studies found within the military context which examined formal and hidden (shadow) structures.¹¹ He investigated "surface level structures" and "deep structures" which define power arrangements. He argues that surface power structures are demonstrated through rank insignia, easily identified by all members in the formal system. The deep structures go beyond the official work environment and refer to codes of behaviour within the organization which indicate power. This shows a shift in focus from the typical formal power structures (surface) to include informal structures (deep), such as individual and organizational behaviour in the military context. However, it leaves little understanding of the shadow behaviours shown on individual, group and organizational levels, or how they interact.

Shadow structures have been studied in organizations by looking at informal and formal networks and relationships in which individuals exchange resources within an organization.¹² The sparse literature of shadow structures in the military organization indicates that the hidden, "shadow" aspects of the organizations have yet to be examined thoroughly. From this theoretical perspective, we have chosen to look at higher-level military staff work through the lens of organizational shadow processes in relation to formal processes.

Rousseau and House¹³ argue that in order to have a wider understanding of organizational behaviour, it should be analyzed in terms of meso-processes, i.e. the cross-level interactions between macro (organizational level) and micro processes (individual and group level). Following their advice, the present study's analysis will examine higher-level staff work and its influencers at the individual, team, and organizational levels so as to secure a broader grasp of their interaction process.

Thus, the aim was to elucidate the role of leadership related to the relationship between informal organizational influencers and the formal organization in a military context. Given the lack of relevant research within this context, a qualitative approach was chosen.

Method

Selection of Informants

Following the guidelines of the grounded theory method (GTM),¹⁴ informants were selected through a so-called snowball sampling technique, with the intention to capture as wide a variety of experiences as possible in a given context.¹⁵ The selection can be described as a convenience sample¹⁶. According to the GTM, interviews are to be conducted until the

¹¹ Gordon, 2002.

¹² Cook, 1982 ; Scott, 1991.

¹³ Rousseau & House, 1994.

¹⁴ Glaser & Strauss, 1967 ; Starrin *et al.*, 1997.

¹⁵ Esaiasson *et al.*, 2003.

¹⁶ Morse, 2007.

analysis reaches theoretical saturation, meaning that no new concepts or categories are being generated. This was the case with the present study, and the researchers ceased data collection after eleven elaborate interviews.

The interview process began by supplying detailed information on the desired sample to a contact at the Swedish Defence Headquarters, which has accessibility to potential informants that matched the study's aim. This person was able to connect us with the first respondents. After the initial interviews, these were able to connect us with other appropriate contacts to continue our process. The respondents were initially contacted by e-mail and informed about the aim of the project and the use of data. Communicating with the informants by e-mail was a conscious strategy to give them time to reflect on whether to give us their informed consent. The e-mail was followed up and a meeting was arranged.

The eleven participants were Swedish, who all had previous experience in national and international staff work. Eight of the eleven were employed at the Swedish National Military HQ as staff members. For the sake of anonymity, the specific military branch is not revealed. The remaining three were involved in formal education for military staff at the Swedish Defence University, with previous experience as military staff members. Five of the staff members had leadership roles, the others were staff group members. Their ranks ranged from Captain to Brigadier General.

Data Collection

Data were collected through qualitative, semi-structured interviews conducted according to a prepared interview guide. The interviews consisted of broad open-ended questions organized around a few main themes inspired by a pilot interview of a previous high-level headquarters military staff officer. The questions centred around the following themes: (1) background questions focused on national and international staff experience; (2) communication in staff work; and (3) ways to influence the decision-making process. The individual interviews were held by the authors in the spring and summer of 2014 at the informants' place of employment. The interviews lasted approximately forty-five to ninety minutes and all were recorded with the interviewees' consent. All interviews were conducted and later analysed by the authors.

Data Analysis

The data were analysed according to the grounded theory method (GTM) with the intention of constructing theory through the analysis of data.¹⁷ The interviews were transcribed *verbatim* and, in a first step, analyzed according to the comparative method by Glaser and Strauss¹⁸ and by means of clustering, a process of moving to higher levels of abstraction. The first step is known as "open coding", where data were examined line by line in order to

¹⁷ Glaser & Strauss, 1967 ; Glaser, 1978.

¹⁸ Glaser & Strauss, 1967.

identify the informants' descriptions of thought patterns, feelings and actions related to the interview themes. An example of a code is given below:

Let's just say I have to work well with him. He is responsible for all of the education, training, ordering of material...I guess you could say that the money lies with him. So I need to make sure that things work well with him....

This quote was coded as *important relationships*.

In a second step, the codes were sorted into different categories based on the similarities found. From the above example, the code *important relationship* was then sorted into a preliminary category called *alliance building*. In the third step, the categories were grouped into superior categories using the constant comparative method of analysis. Continuing with the example above, *alliance building* was sorted into the superior category *individual shadow strategies*. In a fourth step, the superior categories formed the basis of the creation of a model with two clear sub-core categories which indicated a relationship with one another. The first was defined as *shadow factors* and was built up with the superior categories of individual shadow strategies and team shadow processes. The second was *formal factors*, which included the superior categories *shadow discouragers* and *shadow encouragers*. In a fifth and final step, the relationship between the two sub-core variables as well as the related leadership challenges were captured in a core variable, *organization influencers*, thus creating a new model which was grounded in the data.

In practice, the steps of analysis were not strictly sequential, as the constant comparative method was the guiding principle for simultaneous data collection, data analysis and coding until there was a theoretical saturation, meaning that no new concepts or categories were being generated, in line with the iterative process of the grounded theory method¹⁹. The suggested theoretical model is presented in the Results section, including a presentation of the theoretical model, and its core and sub-core variables with their superior and underpinning categories. This particular order is used to give meaning to the individual sections when in relation to the whole model. Illustrations will be presented throughout the Results section under each category.

Ethics

All informants were treated in accordance with human research principles formulated by the Swedish Research Council.²⁰

Results

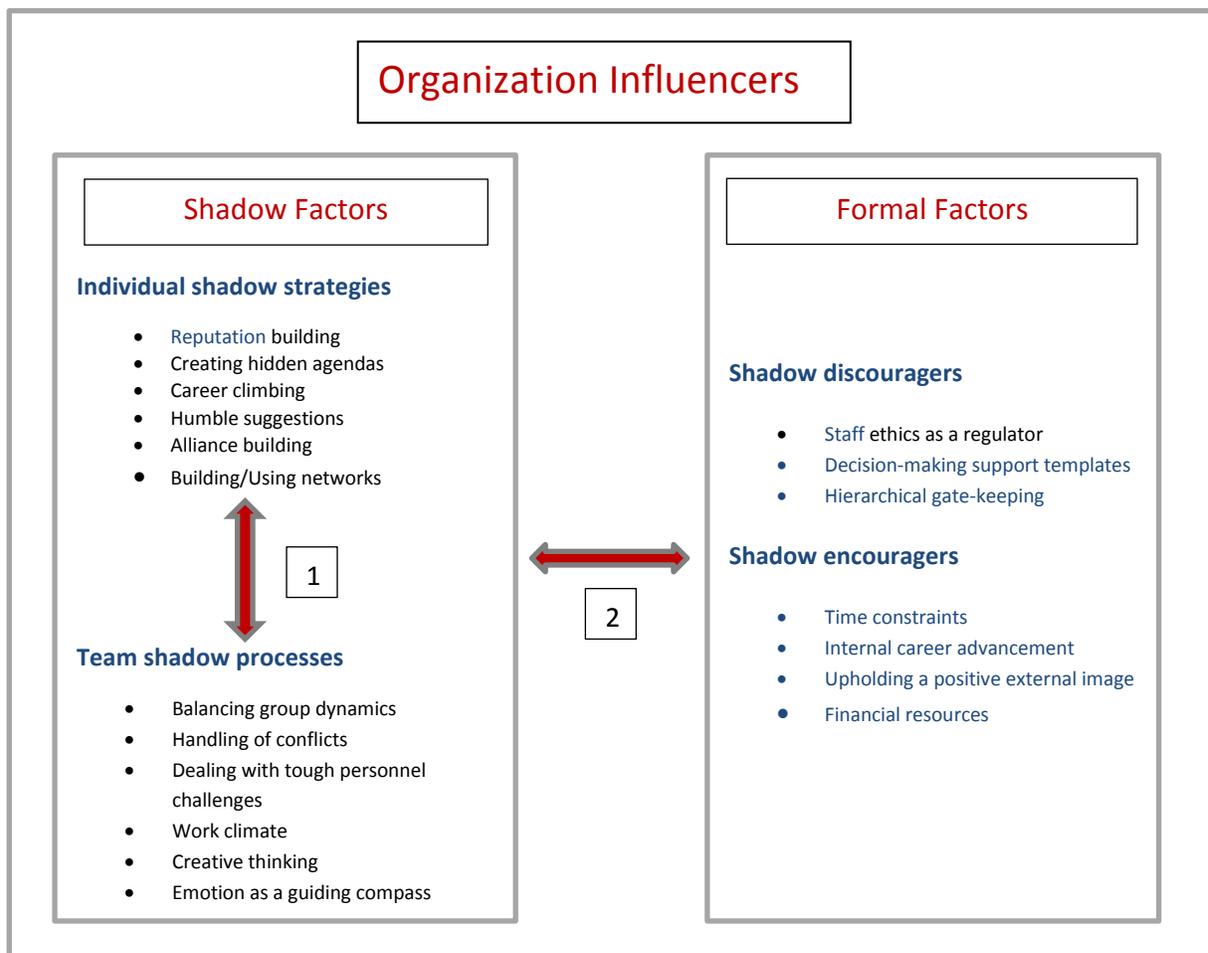
Using Glaser's terms,²¹ the suggested model could be said to represent the causal model family and it is presented in Figure 1 (next page).

¹⁹ Glaser & Strauss, 1967.

²⁰ Swedish Research Council, 2000.

²¹ Glaser, 1978.

Figure 1: Illustration Indicating Identified Leadership Balancing Challenges within *Organization Influencers*.



The figure illustrates that there are two types of organizational factors that influence one another in the Armed Forces, a hidden process (shadow factors) and formal factors. Within the shadow factors, there are both individual strategies and team processes that attempt to influence each other. The first leadership challenge is identified here with the need for the leader to balance individual strategies and group processes.

Moving to the second identified sub-core variable in the study, two formal factors were recognized. The first includes the discouraging efforts of the shadow factors while the other acts as a facilitator, encouraging them. This combination of conflicting forces leads to the second leadership challenge : balancing the shadow and formal factors in a way that is beneficial for the organization.

A quote illustrating the interaction between the two kinds of Organization Influencers is given in the following excerpt from an interview with one of the staff leaders. Following a detailed description of the formal processes one needs to follow in order to reach the Force Commander, he also described a shadow strategy:

I don't think it is exactly a problem for me in my position or one of the other bosses that have a similar position as me, but those that have lower positions sometimes try to get through this filter and reach the higher positions with good ideas. They can be stopped from others, it's like they have a road block and if you don't break through it then you can't get your ideas up. You don't get to the boss (Force Commander-our comment) if you aren't really lucky or you haven't tried really hard by even approaching him/her in the lunch room, if you understand what I mean. It can be really hard to break through that barrier.

This citation illuminates the need, at times, for individuals to use shadow strategies to reach higher power positions when it is not permitted through the normal hierarchical organizational processes. It also highlights an example of a shadow discourager, which attempts to hinder the flow of information from the staff members upwards towards the desired superior.

Shadow Factors

This sub-core variable adds to the theoretical understanding of shadow organizations by mapping out the individual and team shadow strategies and processes that act as hidden influencers in a military context. Items categorized in this sub-core variable were described as informal influencing factors within staff work which can affect formal processes within the organization.

Two superior categories were identified. The first superior category consisted of strategies at the individual level to influence the formal organization. There were six underpinning categories identified: (1) reputation building, (2) creating hidden agendas, (3) career climbing, (4) humble suggesting, (5) alliance building, and (6) building/using networks. The second superior category consists of team shadow processes, which can be described as soft processes put in place by leaders in order to have a favourable working environment and achieve organizational goals. Unspoken, such processes affect the group productivity and thus the formal organization. The underpinning categories identified here are: (1) balancing group dynamics, (2) handling of conflicts, (3) accepting emotion as part of the job, (4) work climate, (5) creative thinking processes, and (6) emotion as a guiding compass.

These two superior categories are interpreted as bi-directional with attempts for each to influence each other at times. Therefore, a leadership challenge (leadership challenge one) was identified here in order to balance the influencing attempts of individuals with the goals of the team. All codes within these categories were characteristic of not being easily identifiable in current formal practices or procedures; therefore the dimension was coined shadow factors.

Individual Shadow Strategies. Sometimes, these were interpreted as being ego-driven; however, they were also often organizationally beneficial. This ambiguity can enhance the leadership challenge of identifying and balancing them with team goals and formal organizational processes. The six identified shadow influencers are described below.

Reputation Building. The first underpinning category identified was the need to uphold a high level of performance in order to build a positive reputation for oneself for career future career advancement. An example of a code found in this underpinning category is a low tolerance for mistakes, which seemed to be a general perception among informants. A belief that if mistakes are made, one's reputation could be tarnished and a challenge to rebuild since on the labour market there is no organization similar to the military from which to secure alternative employment and start over with. This is illustrated in the following statement :

It's a little like this... I would say that anyone who makes a fool of himself, it's almost impossible to shake that reputation because there are so few of us. Everyone knows about it anyway because it is such a small organization, so it is difficult to get a second chance. If you make a mistake at a civilian company then you can look for new companies with related experience and no one knows what you've done before, but here it is your history, it stays here.

Creating Hidden Agendas. Different types of hidden communication factors were described by several informants. These were usually seen as self-serving in nature and were spotted when something was not working well between teams.

There can be different reflections over what works and doesn't work within the whole staff. And very often when something isn't working, it is usually because someone hasn't been fully honest about their information.

One of the leaders contributed the following about hidden agendas:

Something that can be unfavourable in our staff team is when people have their own agendas. I would say it is even worse than when people maybe don't have enough ability for something and it ends up going in the wrong direction.

There was a general feeling that individual or team benefits at times came into play regarding the information that was disclosed.

Career Climbing. Another underpinning category described was the amount of career ambition exhibited by individuals at work. It was stated that the ideal was neither too much nor too little, and "career climbers" only looking out for their own best interest were to be avoided as they were disruptive of team goals. This is highlighted in the following citation :

It's best to have individuals with just the right level of desire for prestige, those that have a balanced level of career ambitions. You don't want the worst careerists who only want to go forward, that doesn't lead to a stable staff.

Humble Suggestions. Presenting ideas or solutions to the boss before the decision-making process starts was looked upon favourably. The following is an example of this:

It's good if you dare to go in and talk with [the leaders] because then it is open communication. You should never put the boss in the terrible situation where he is going to receive a problem without possible solutions in front of a sitting audience.

This may include allowing others who have the power to make or influence the decisions, to take credit for your ideas :

You have to be able to distance yourself, or forget about your own prestige. That way you won't be disappointed when this person presents your idea as his own, even though it was actually yours. It's about not having prestige.

Most codes in this category included individual ability to set one's own pride aside for the sake of team or organizational goals.

Alliance Building. Alliances were described positively in different contexts by several of the informants. It usually consisted of individuals that have known each other for years through serving together in various contexts, and who later come together when necessary to try and influence decisions with a unanimous voice. As one leader described:

There is an informal group of people that sit in higher positions which makes it possible for them to have quite a bit of influence on things...It's something we all call the "headquarter click", I'll explain... [They] have come together and been allowed to handle things that leaders on the level above them believe they don't have time for, I guess you could call it rather unorganized, it's a bit sloppy...

When asked how they handle these informal power groups, a reply was :

They [superiors] are pretty knowledgeable on most things, if you have something that doesn't agree with their ideas, then it is really hard to get past them...It's important for us department leaders to know what we're talking about and on the same page before we take a request or idea to them. Because XX isn't going to succeed if he says one thing and I say another.

Basically, the idea of approaching these power barriers with a united front in an attempt to influence them was seen as more successful than approaching them individually.

Building/Using Networks. Codes included in this final section concerned building and taking advantage of networks in order to take your ideas to higher-ups who have the power to make decisions. An example of network building is seen here:

Then it is a direct analysis of which people make these decisions. Whom does the boss have trust in ? Then in some way you need to build a relationship with them immediately, and I never wait around on that...I start working super hard with that immediately.

Below is an example of using personal networks :

Since many have known each other here [at headquarters] a long time they try the informal way where people seek to slide their way through with things... Not by being open and honest but by trying to get things through their contacts, a person calls someone or emails someone and tries to plant a seed that way... It happens.

This strategy was generally frowned upon by the informants and was often described as “*going against ethical staff work*”. Many times, it was connected to people wanting decisions to go through for personal (career boost) or team gain. Below is an example described when it comes to using personal networks for organizational gain :

I work really hard on building confidence with others. I call people that I have connections with, those that I know I have gained their confidence and that they trust me. Then I put ideas and thoughts out, I let them grow a while and then later I start building a puzzle.

Informants further reported that it was often difficult to distinguish when a person is using hidden agendas for personal benefit rather than for organizational gain.

Team Shadow Processes. Higher-level military staffs are composed of several bureaux or smaller teams working together to perform specific tasks and offer possible solutions to the problems raised by the Chief of Staff. Given a staff’s innate need to perform together for optimal results, the leader’s ability to balance the team’s goals with individual goals and influences is often necessary. These shadow processes are described below.

Balancing Group Dynamics. The first underpinning category included codes which described the need for the leader to balance the group based on factors such as personality, previous experience, personal chemistry, etc. There are also differences among military departments, for example :

There are definitely different cultures [between military departments]. Those from the Navy are not as experienced at working within the hierarchy.

Many informants stated how important it is for each staff section to be able to work effectively as a team, meaning that everyone has room to join in on the collaboration and that the final product is a group effort. This is shown through the following quotation :

When you have a group formation to work in, that is because it should be beneficial to work as a group, so the group must let everyone be able to speak... If you don’t have anything to contribute within the group and you are not asked to contribute either, then you shouldn’t be at the meeting actually. It is just wasted time.

Leaders have the role of balancing these multiple facets in the group. One leader describes how that is best achieved :

People have different talent levels when it comes to discussing. As a leader [of a working group] I try to encourage those who have said the least and squeeze out of them what is important... I believe that the majority contribute when encouraged.

Handling of Conflicts within the Group. Leaders at all levels stressed the importance for them to handle conflicts among their subordinates as soon as they arise. This is illustrated here :

I handle conflicts as quickly as possible, simply put, and I never believe that you can silently kill a conflict, it just doesn’t work.

The focus was largely on effective conflict resolution as necessary for a well-functioning staff unit. If the conflict continues, staff members may need to be replaced:

In some way they need to be able to handle the conflict professionally or people may need to be switched out.

This was particularly important in a national staff where colleagues may be serving together for longer periods of time. It may be different in an international setting because if members can find a working relationship for as long as the mission lasts, it may be possible to keep the same personnel until they return home.

Several informants in leadership positions stressed the importance, in order not to let the conflict infect the rest of the group, of being firm with the parties involved in letting the conflict persist after it had been resolved. For instance :

I slammed my fist on the table to get their attention and said “we’re sitting together in this room so that no one else knows about this, so we can solve the problem. Since that is the case, I don’t want to hear any shit talk about this outside of this room...that you go around and talk about it. It should be figured out in here and then I don’t want to hear any more discussion about it.

Dealing with Tough Personnel Challenges. Superiors sometimes encounter challenging personnel issues that affect team performance. The recognition of the need for leaders to deal with these personal experiences in an emotionally sensitive way in order to help their subordinates professionally was described by several of them. One example is shown here :

Something that really gets a leader to develop very quickly is when you step into a boss position and you get these personnel challenges. I think you become a much better boss when you have learned to handle tough personal situations among your subordinates because you have a better feel for different people and their different situations.

Specifically, handling subordinates’ personal problems can be viewed as uncomfortable and the matter is often referred to a higher-level boss for him or her to handle :

I think leaders are a little uncomfortable [in such a case], and often the problem is pushed up the hierarchy until it reaches the top levels. Then it is probably the realization that I am the employer : the higher up the hierarchical levels the problem goes, the more acute that realization, and the easier it becomes to know that I need to fix this myself, otherwise it won’t work in the group. I think you become more comfortable with these issues because you are forced to. I don’t think there is anyone who thinks that it is fun, if I for instance have a fellow colleague who has an alcohol problem, it isn’t fun to get involved, but I think it is simply necessary.

This shows the importance for leaders to step in and handle subordinates’ personal problems which may affect their performance and the whole functioning of the group if left ignored.

Work Climate. All interviewees discussed the importance of a positive and fun work climate, which they unanimously agreed that they indeed had. Their environment was often described as a “*happy ship*”, referring to a positive service climate that would be found aboard a Navy boat at sea. When asked how an organization does this, one of the replies was :

It’s about having a common goal and [ours is] that we are a tactical staff which is for leading our troops.

Most agreed that every individual has responsibility in creating a positive work environment, but that those in leadership roles have a higher responsibility :

If the boss has it as a task to create a happy ship, then you will have a happy ship. The boss has to make the effort [and] it is the most important task actually, to create opportunities and to lighten the atmosphere.

When asked what contributed to this type of service environment, most referred to informal events such as spending time together outside of work to create bonds:

It’s important that people get to know each other. It’s not so easy to be in the formal working situation and get to know each other.

Creating a positive psycho-social climate generally involved informal occasions and the leader’s use of tactics such as humour to create a more relaxed environment.

Creative Thinking. An identified underpinning category which expressed the need for some to have freer processes when seeking solutions. This was usually a process adopted by leaders when they convened and at times they called upon individuals based upon expertise to solve a specific problem:

We sometimes have ...like a little leading group that we set up and then discuss a little more freely on more specific topics... That includes my boss and we often include some of the section leaders as well. Sometimes some of the clever planners or the operators are included if it is something more acute. Then the process is more free, [somewhat like] a “think tank” process, where we can think a little more freely, outside of the box and try to look at the problem from different perspectives.

One of the challenges encountered by planning team leaders was when to follow planning guidelines “by the book” and when to loosen up and allow more “out of the box” thinking.

Another factor identified within this underpinning category was the need for teams to have high levels of cognitive flexibility – allow different ideas and perspectives to emerge – in order to come up with alternative solutions that might not have been generated otherwise :

I think that different types of thinking are better in a group setting. Depending on if the person suggesting the opposing idea presents it the right way, the person who is making the decision has an opportunity to change their mind and the others are also on board because at the end, you have to be able to come up with some type of result. But there truly needs to be an understanding that after we have discussed this, we have to come up with some type of decision.

This promotion of different ideas and alternative solutions is more frequent in national than in international staff work as many staff members in the former case have very similar backgrounds and work experience.

Emotion as a Guiding Compass. The final underpinning category included informants' use of emotion as a guide when making decisions rather than depending on only formal rules and procedures. The following comment shows that different leadership styles make for different decision-making processes:

We think rather similarly about the problem but my boss is more reflective, he thinks things through several times through before he makes a decision. I rely more on feeling (...). I don't know exactly what this feeling is based upon, but it can be a bit of intuition or that suddenly that a person has so much experience that it is rather subconscious...

Several informants referred to their moral compass as a type of guide in helping to make decisions :

...it has something to do with experience [gut feeling], and inner confidence and some form of moral compass that points towards the right decision.

The majority agreed however that these emotion-based guiding processes should naturally be combined with formal processes as well.

Formal Factors

This superior category was built upon underpinning categories describing formal organization factors which can be discriminated as either shadow-discouraging or encouraging in nature. This naturally can leave leaders and subordinates with a mixed message as to whether or not shadow organization influencers are seen as positive or negative. The second leadership challenge was identified here, which consists in balancing the shadow and organization influencers depending on the context. It is advisable for leaders to identify which contexts allow or disallow shadow influencers in order to best benefit the organization.

Shadow Discouragers

This superior category includes three underpinning categories which were interpreted as formal organizational processes which discourage shadow organization influencers.

Staff Ethics as a Regulator. Different ways of keeping group members in and others out with a view to protecting a group process was also described. An example of this consists of rules enforced in order to comply with formal staff ethics guidelines agreed upon by group members. These could best be defined as the "playing rules" which determined who and what was allowed to be part of decision-making processes:

We have identified on a few occasions, and explained to the person or people involved, "no, that is not ethical staff work, we don't do it like that, so just calm down. You guys are not involved in this process so please just wait outside".

This is a formal code of acceptable behaviour when it comes to working processes. It was described one of the functions of staff ethics is to discourage hidden agendas, and stop individuals from interfering in processes that they may not have a comprehensive picture of.

Decision-Making Support Templates. Contrary to the creative thinking processes found in the team shadow processes, support templates are formal support measures that have been put in place as a routine to follow when the group makes decisions together. As previously mentioned, the thought behind it is that a checklist is useful to help the group consider all of the factors before coming to a decision. It helps to make sure that all areas are covered and there are not any holes in the plan. One leader described the importance of the template thus:

Naturally, it also depends on how pressed we are for time, the paradox is that the more we need to get out of a staff, the more important it is that the working process works, that people follow routines. Unfortunately, if we are not routine in our procedures, that is when we can err. People take shortcuts and then it isn't good. There can be faults in the final product.

This reflection also shows the conflicting perceptions different leaders had within the same staff on following support templates. This highlights the confusion subordinates may experience in following formal processes when they are in doubt as to what their team leader's inclinations are in that regard.

Gate-Keeping. It was reported by several informants that there were formal power structures consisting of small groups of individuals within the Headquarters levels that have strong influences on the information fed to the top leadership (the Force Commander). This has the advantage of allowing the higher leadership to focus on other tasks. But there are downsides, exacerbated by the fact that people within such power structures stay in their position longer than average, giving more informal power and status to their roles:

They sit there fairly long [in their positions]. I would maybe say that they are changed out less than the bosses. That is probably what makes it so hard because if you come in as a new boss you just simply trust their roles.

It was also stated that :

This group has instructions and procedures and so forth, but they are the ones who put everything together and a lot of it is based on their own core values.

Such homogenous thinking often prevents ideas that are different from travelling upwards. This, in turn, increases the bureau chief or team leader's temptation to bypass the formal chain of command in order to allow his staff's ideas to reach the Force Commander.

Shadow Encouragers

This superior category is built up from four identified underpinning categories which encourage shadow organization influencers within the formal organization.

Time Constraints. One of the challenges encountered in higher-level staff work resides in the often quick shifts in tempo. The time allotted to come up with possible solutions depends on the current national and international situation, and is apt to change very rapidly:

Change in tempo, that's important. People have to understand and be able to change tempo, that "no, now we don't have the time, we can't sit and talk and discuss ; it has to be this way – answer briefly, you have two minutes to do it in".

Time often plays a critical role in determining when a leader should adhere to strict procedure and when to speed up the process by using more shadow group processes, such as creative thinking and emotion or intuition as a guiding tool. In these time-critical situations, shadow influencers may be organizationally beneficial.

Internal Career Advancement. This was mentioned as a source for many individual shadow strategies. The military does all of its leadership recruitment and career advancement within the organization. This often results in strenuous efforts by individuals to be noticed for their talents in order to achieve career advancement. This, at times, was seen as taking its toll on the collective goals and effectiveness of a team. A leader made the distinction :

This happens if the person is doing something for [his or her] own personal gain. If it is only for that reason, then it is not positive and should be identified as such.

Informants also mentioned that the drive for internal career advancement also encourages staff members to work harder in order to be recognized. So there appears to be advantages as well as disadvantages to the internal leadership recruitment which often encourages shadow influencers.

Maintaining a Positive External Image. Respondents mentioned that the organization attaches special importance to the requirement that all of the staff members uphold its external image during and after service hours. One leader pointed out that he believed that it was okay for mistakes to be made by his staff on duty as long as they were "well-intended mistakes", such as having the wrong understanding of a situation, etc. However, there was no tolerance for a member's personal mistakes when off duty. This is reflected in the following statement:

It's OK [to make a mistake] if a person has done everything that one could do in the situation... On the other hand, if I go out in the city and do something stupid then there is no understanding for that at all.

This was further elaborated by saying that staff members represent the organization even in their private life and needed to behave appropriately in public settings. This infiltration of service duty requirements into private life can be seen from the individual's perspective as a shadow encourager to adhere to formal rules even when not formally serving. There appeared to be a need for professional reputation-building 24 hours a day.

Financial Resources. Budget allocations were described repeatedly as driving forces behind many shadow strategies on the part of groups and individuals in competition with one another. As one informant pointed out:

A lot is rooted in a fight over money. I mean airplanes are very expensive, they take a large amount of the budget. Submarines are also pretty expensive and then there are a lot of other factors as well.

It was also stated that:

It's been really hard during the past few years because we've had big economic problems, not having enough to cover everything. It has caused a lot of damage between the different branches here. It causes quite a poor atmosphere within headquarters when people think that others possibly aren't being honest with them.

The Armed Forces had recently gone through substantial budget cuts and many positions at headquarters were affected by that. It resulted in a shrinking of department budgets, which generated competition for money within each department.

In sum, these identified formal organizational influencers leave intact the challenge facing leaders: to discriminate when shadow influencers should and should not be used for achieving organizational goals. The ideal situation would allow for them to combine behaviour that would be beneficial for individuals or teams and the organization.

Discussion

The study's aim was to elucidate the role of leadership related to the relationship between informal organizational influencers and the formal organization in a military context. A core variable was identified in the data, Organizational Influencers, connecting the two sub-core categories in a bi-directional relationship with the leader's role emphasized in managing the balance of the different forces. The two sub-core variables, respectively coined Shadow and Formal Factors, represent the dynamic push and pull relationship between hidden and formal organizational factors in higher-level military staff work. As recommended by Rousseau and House²², a meso-level analysis was conducted on military organization behaviour. This included both macro levels (organization) and micro levels (individual and group) in order to secure a deeper understanding of how shadow and formal organizational factors relate to one another.

Leadership challenges as regards shadow and formal influencers were identified from the data, illuminating the role of leaders in steering the two forces. The first was the need to balance individual and team shadow influencers within staff work in order to maintain a healthy equilibrium. Thus, while achieving team goals, leaders have to allow professional development for individuals irrespective of those goals.

²² Rousseau & House, 1994.

The second leadership challenge, as indicated by data analysis, is the need to balance shadow influencers at the individual and group level with the formal organization. When that is the case, the shadow organization can offer the formal organization an increased level of flexibility to achieve its objectives.

The model presented in this study is new in that it indicates that the shadow factors of organizations do not always need to be interpreted as negative forces as previously considered.²³ In fact, they can be beneficial for the organization insofar as they often serve a purpose that the formal organization cannot achieve, such as acting as an organizational accelerator. These results are in line with Kolodziejski's findings²⁴, which point out that the organizational shadow can be seen as an untapped potential for organizations. However, both divergent and convergent forces were identified in the current study, indicating that although there is a potential for organizational benefits, there is also a risk for negative outcomes. These results are likewise in line with Johnson's findings²⁵ on the personal shadow being more of a summation of subconscious qualities, which we argue can even be applied to organizational settings.

The identification of formal factors that also encourage shadow factors leads to a more in-depth understanding of the layered tapestry of organizations, even those that are hierarchical and supposedly transparent in their processes, such as the military.²⁶ The Armed Forces give a mixed message, simultaneously encouraging and discouraging shadow factors depending on the context. Thus, these two dimensions stand in a push-and-pull rather than in a bipolar relationship as was previously described in industrial organizational (IO) psychology.²⁷

Yet another theoretical contribution is the important role leadership plays in harnessing a balance between shadow and formal influencers. Previously, Bowles²⁸ defined leaders as being the shadows of organizations, whereas our findings indicate that high-level leaders in fact have another role, which is managing the shadow rather than encompassing it. This can redefine our understanding of shadow organizations and elucidate the importance of the leader's balancing act in the interaction between the shadow and formal organization.

Our findings on shadow influencers resemble Gordon's²⁹ deep structures of defining power arrangements in the military context. Although our formal boundary filters also include elements of hierarchical power, which is similar to Gordon's surface-level structures, we have highlighted the importance of formal organizational filters, which allow or disallow shadow

²³ Talley, 1987 ; Bowles, 1991 ; Coleman, 1992.

²⁴ Kolodziejski, 2004.

²⁵ Johnson, 1991.

²⁶ Andreski, 1954.

²⁷ Talley, 1987 ; Bowles, 1991 ; Coleman, 1992.

²⁸ Bowles, 1991.

²⁹ Gordon, 2002.

influencers from influencing the surface-level structures. Therefore another of our theoretical contributions is illuminating the gap between the shadow influencers and the formal organization, with the leader functioning as a gate-keeper between the two. Our concepts build further on Gordon's deep power-structure concepts by identifying power strategies used at both individual and team levels found among the shadow organization influencers.

Implications for leadership can be derived based upon how well leaders can balance the shadow influencers and formal organization. Much emphasis can be placed upon the leaders' ability to see overarching organizational goals clearly so that it is easier to understand and enforce what is best in different contexts. This is supported by Andersson³⁰, who makes the point that, in order to understand the different factors which influence leaders' decisions, military leadership should be seen from all different angles and from a holistic perspective, not from just a defined event in itself.

The analysis further indicated that individual shadow influencers can be both positive and negative for organizational outcomes. This is in line with Hackman and Johnson's recent findings in the field of organizational politics³¹. Previously, the interpretation of informal influence processes, such as hidden agendas, had been negative. Organizational politics, not least networking, seems to be particularly important for higher-level leaders both within and outside of the organization, typically known as boundary-spanning actors (source). However, it can ultimately be argued that there can be a blurred line between an individual's ego-driven goals and those that are beneficial for the organization, sometimes with both simultaneously present. Therefore, there are many ethical considerations that the leader must be aware of to take action in order to follow ethical leadership practices which are of utmost importance for many of the modern leadership theories, such as authentic,³² transformational,³³ and ethical leadership.³⁴ This implies a realization that there is a difference between normative (what leaders "should" do) and descriptive (what leaders actually do) approaches to practicing ethical leadership³⁵. These elements, in turn, can have benefits and costs for individuals and/or the organization.

Looking at our suggested parallel processes model from the perspective of higher-level leadership, clear resemblances can be found with a model of indirect leadership developed by Larsson and colleagues.³⁶ The latter model includes two kinds of top-down influences. One is labelled action-oriented and largely corresponds to the formal structure in this study. The other is called image-oriented influence and includes a variety of the softer influencing factors that

³⁰ Andersson, 2001.

³¹ Hackman & Johnson, 2013.

³² Avolio & Gardner, 2005.

³³ Bass, 1995.

³⁴ Treviño *et al.*, 2003 ; Brown *et al.*, 2005.

³⁵ Brown & Treviño, 2006.

³⁶ Larsson *et al.*, 2005, 2007.

the leader uses in order to reach his/her subordinates. The current study can enrich the theoretical model by adding the importance the leader has in balancing the bottom-up with top-down influences within military organizations, rather than by overly focusing on the latter as in the indirect leadership model. Since the indirect leadership model also points to the interdependence between the two kinds of influences, as well as to both positive and negative aspects of the soft side depending on the leadership style of the higher-level leader, the similarity in content, despite different concept labels, can be seen as supporting the validity of the present model.

This study has several limitations. We do not claim to have captured all of the different components of influencing factors in higher-level staff units. In constructing our model we were limited to data obtained from selected groups of informants. However, the accuracy of the reports in the present study is supported by the fact that the narratives were exhaustive and rich in detail.

Another weakness we need to highlight is the lack of representativeness, which is inherent in the chosen qualitative method. As a limited number of participants were chosen in order to give a detailed account of their thoughts and ideas, the results cannot be generalized for certain to other contexts. It should also be emphasized that the concepts derived from the data are of a sensitizing rather than a definitive character, as described by Blumer.³⁷ In summary, the suggested model of influencing factors should be viewed as preliminary, and in need of testing in other contexts. The interrelationships between the superior categories were fully developed and core variables were extracted from the data and were defined as shadow influencers and organizational boundary filters according to Glaser and Strauss' definition.³⁸ Although the model points to a suggested chain of causality,³⁹ it gives little guidance on the relative impact the various influencing factors have on the outcome of a decision in a given situation.

Although our findings are dependent on a specific military context, we hypothesize that they may be applicable to other organizations other than the military and that the balancing act of the shadow influencers and formal organization should be recognized and skilfully balanced by leaders in all organizations. Future research efforts should be focused on exploring these relationships in other organizational contexts. Of specific interest could be to explore shadow influencers in “flatter” organizations than the military.

³⁷ Blumer, 1954.

³⁸ Glaser & Strauss, 1967.

³⁹ Glaser, 1978.

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