

Managers' upward influence tactic strategies: the role of manager personality and supervisor leadership style

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Summary

Why do managers employ certain tactics when they try to influence others? This study proposes and tests theoretical linkages between the five-factor model of personality and managers' upward influence tactic strategies. Longitudinal data from 189 managers at 140 different organizations confirmed that managers scoring high on extraversion were more likely to use inspirational appeal and ingratiation; those scoring high on openness were less likely to use coalitions; those scoring high on emotional stability were more likely to use rational persuasion and less likely to use inspirational appeal; those scoring high on agreeableness were less likely to use legitimization or pressure; and those scoring high on conscientiousness were more likely to use rational appeal. Results also confirmed that managers' upward influence tactic strategies depended on the leadership style of their target (their supervisor). Managers were more likely to use consultation and inspirational appeal tactics when their supervisor was a transformational leader, but were more likely to use exchange, coalition, legitimization, and pressure tactics when their supervisor displayed a laissez-faire leadership style. Copyright © 2002 John Wiley & Sons, Ltd.

Introduction

Much of managerial success hinges on the ability to influence others (Bass, 1990; Yukl, 1998), but little research has studied why managers choose certain influence tactics over others. This is an important issue because the methods that managers use to get things done in an organization have important consequences for the culture of the organization and how people in the organization relate to one another. Thus, an organization where most managers use pressure and persistence to get things done may attract and retain a very different type of workforce than an organization where managers gain support through rational persuasion and fact-based logic.

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Some research has suggested that there is a dispositional basis to influence tactics, such that individuals' personalities cause them to be predisposed toward certain influence tactics. For example, Mowday (1978) found that people with higher needs for power and achievement were more likely to use influence tactics, although this study did not examine which particular tactics were more likely to be used. Farmer, Maslyn, Fedor, and Goodman (1997) found that 'soft' influence tactics (e.g., ingratiation) were related to locus of control and self-monitoring. However, these studies examined a piecemeal collection of personality traits and no published research to date has examined a unified, comprehensive personality framework to predict influence tactic strategies.

Next, managers' choices among upward influence tactics may depend on the leadership style of their supervisors. From a signalling perspective, managers may take their cue regarding which influence tactics to use on a target by watching how that target tries to lead others. Some supervisors inspire others to identify with a vision that reaches beyond their own self-interests, while other supervisors take a hands-off approach that essentially avoids leadership duties unless it is absolutely necessary (Bass, 1985). Preliminary support for a relationship between managers' influence tactics and a target's leadership style was provided by Ansari and Kapoor (1987), who found that individuals were more likely to use rational influence tactics when their target was participative but were more likely to employ ingratiation tactics when their target was authoritarian. However, these results emerged from a laboratory study of undergraduate students in a role-playing situation, and additional research is needed to extend these results to actual managers and organizations.

The present study uses the five-factor model of personality (Goldberg, 1990) to provide a unifying framework for studying the relationships between personality traits and influence tactics, and also examines whether managers' choices of influence tactics depend on the leadership style of their targets. Thus, this paper seeks to examine the joint effects of disposition and situation on managers' influence tactic strategies. In the section that follows, we present the five-factor model of personality and we develop hypotheses between personality and influence tactics. Next, we discuss leadership styles and develop hypotheses between leadership styles and influence tactics. Finally, we consider possible interactions between personality traits and leadership styles as predictors of managers' influence tactics.

Five-factor model of personality

If a consensual structure of personality is ever to emerge, the five-factor model, or 'Big Five' (Goldberg, 1990), is probably it. The Big Five model has provided a unifying taxonomy for the study of personality, which is essential to the communication and accumulation of empirical findings (McCrae & John, 1992). The five-factor structure has generalized across cultures and rating formats (self, peer, observer, and stranger ratings), and there is considerable evidence that the Big Five are heritable and stable over time (Costa & McCrae, 1992). The factors comprising the Big Five are: (1) *extraversion*, which represents the tendency to be sociable, assertive, expressive, and active; (2) *agreeableness*, representing the tendency to be likable, nurturing, adaptable, and cooperative; (3) *conscientiousness*, referring to the traits of achievement, organization, task-focus, and dependability; (4) *emotional stability*, which is the tendency to be secure, emotionally adjusted and calm; and (5) *openness to experience*, which is the disposition to be imaginative, artistic, non-conforming, and autonomous.

Influence tactics

Yukl and his associates (e.g., Falbe & Yukl, 1992; Yukl, Kim, & Falbe, 1996; Yukl & Tracey, 1992) have developed what is perhaps the most comprehensive taxonomy of influence tactics. Their typology

gathers together nine influence tactics: (1) *rational persuasion* (using logical arguments and factual evidence to persuade a target that a request will result in the attainment of task objectives); (2) *consultation* (seeking a target's participation in planning a strategy, activity, or change for which the target's assistance is desired); (3) *inspirational appeal* (arousing a target's enthusiasm by appealing to values, ideals, and aspirations); (4) *ingratiation* (seeking to get a target in a good mood or to think favorably of the sender before asking the target to do something); (5) *personal appeal* (appealing to a target's feelings of loyalty and friendship toward sender before asking the target to do something); (6) *exchange* (offering an exchange of favors with a target, indicating willingness to reciprocate at a later time, promising to share the benefits if the target helps); (7) *coalition* (seeking the aid of others to persuade a target to do something or using the support of others as a reason for the target to agree); (8) *legitimizing* (seeking to establish the legitimacy of a request by claiming the authority to make it, or by verifying that it is consistent with organizational policies, rules, practices, or traditions); and (9) *pressure* (using demands, threats, and persistent reminders to influence a target).

Although influence tactics may be directed at various targets (upward, downward, lateral), here we focus on upward influence tactics. The next section proposes a system of hypothesized relations between personality and influence tactics, grouped according to the factors comprising the five-factor model. We then consider the role of supervisory leadership style in affecting a manager's choice of upward influence tactics.

Upward influence tactics and personality traits

Extraversion

The three hallmarks of extraversion are sociability, dominance, and positive emotionality (Watson & Clark, 1997), such that extraverted people are talkative and expressive, enjoy interacting with others, are assertive, and are predisposed to the experience of positive affect. Thus, in terms of influence tactics, extraverted individuals should be more likely to engage in inspirational appeal, ingratiation, and personal appeal. In general, all three of these tactics require connecting with or engaging others in a positive friendly manner, which are the behaviors of extraverts (Watson & Clark, 1997). More specifically, extraverts are articulate, expressive, and dramatic (Goldberg, 1990), suggesting that such individuals will be more likely to use inspirational appeal to influence others. Second, Tedeschi and Melburg (1984) define ingratiation as 'a set of assertive tactics which have the purpose of gaining the approbation of an audience that controls significant rewards for the actor' (p. 37). We have already established that one of the characteristics of extraverts is assertiveness, thus it makes sense that extraverts should be more likely to use assertive (as opposed to passive or defensive) influence behaviors. Furthermore, extraverts are reward-sensitive (Stewart, 1996), making them especially likely to use tactics that are linked to rewards, which is the purpose of ingratiatory behaviors according to Tedeschi and Melburg (1984). Indeed, Briggs, Cheek, and Buss (1984) found that extraversion was related to a willingness to behave in a way that suits other people. Thus,

Hypothesis 1: Managers who score high on extraversion will be more likely to adopt upward influence tactics that emphasize (a) inspirational appeal, (b) ingratiation, and (c) personal appeal.

Openness to experience

Individuals who score high on openness to experience are described as imaginative, original, unconventional, and artistic (Costa & McCrae, 1992). Of the Big Five traits, openness is the best predictor of artistic and scientific creativity (Feist, 1998). Because inspiration is closely linked to creativity

(Martindale, 1989), individuals scoring high in openness to experience should be more likely to engage in inspirational appeal as an influence tactic than people who are uninspired, predictable, and unimaginative. Furthermore, open individuals are non-conforming, divergent, autonomous, and independent (Costa & McCrae, 1992; Goldberg, 1990; McCrae, 1987). Because coalition tactics involve joining others who unite to accomplish a collective goal, such behaviors seem contrary to the orientation of open individuals. Thus,

Hypothesis 2: Managers who score high on openness to experience will be (a) more likely to adopt upward influence tactics that emphasize inspirational appeal and (b) less likely to adopt upward influence tactics that emphasize coalitions.

Emotional stability

Emotionally stable individuals are calm, secure, and are not nervous, while those who score low on measures of emotional stability are likely to be anxious, emotional, embarrassed, and depressed (Wiggins, 1996). These descriptions of emotional stability appear relevant to two types of influence tactics: rational persuasion and inspiration appeal. Theoretically, people who are calm, secure, and stable are more likely to use logic and rational persuasion when trying to influence others. Indeed, Morelli and Andrews (1980) found that neurotics were less likely to hold rational views in a number of respects. On the other hand, the anxiety levels and negative emotionality of individuals low on emotional stability may lead them to be more inspiring. Simonton's study of leaders documented many inspirational leaders who were neurotic, including Churchill, Hitler, Lee, Lincoln, Luther, and Napoleon. It stands to reason, then, that scores on emotional stability scales should be negatively related to the adoption of inspiration appeal tactics, which require an emotionally charged disposition and disturbance of the *status quo* rather than calmness and composure. Thus,

Hypothesis 3: Managers who score high on emotional stability will be (a) more likely to adopt upward influence tactics that emphasize rational persuasion and (b) less likely to adopt upward influence tactics that emphasize inspirational appeal.

Agreeableness

Like extraversion, agreeableness is a dimension of interpersonal behavior (Trapnell & Wiggins, 1990). Agreeable individuals are altruistic, warm, generous, trusting, and cooperative, and research indicates that agreeableness is negatively related to aggression and hostility (Costa & McCrae, 1992; Zuckerman, Kuhlman, Joireman, & Teta, 1993). Because agreeable individuals value cooperation and avoid conflict, they should be repelled by forceful, conflict-based influence tactics. Graziano, Jensen-Campbell, and Hair (1996) found that agreeable individuals preferred interpersonal tactics that were oriented toward conflict resolution and away from power assertion tactics. Thus, individuals scoring high on agreeableness should be less likely to employ legitimizing tactics (which hinge on asserting the authority to make a change) and also should be less likely to use pressure tactics (which revolve around demands, threats, and interpersonal hostility). Both legitimizing and pressure tactics should appear more attractive to people scoring low in agreeableness, because it is less important for them to be likable and soft-hearted (Barrick & Mount, 1991) and easier for them to make insistent demands. Thus,

Hypothesis 4: Managers scoring high on agreeableness will be less likely to adopt upward influence tactics that emphasize (a) legitimizing and (b) pressure.

Conscientiousness

Conscientious individuals are ambitious, practical, task-focused, and persistent, as well as planful, careful, and organized (Costa & McCrae, 1992; Mount & Barrick, 1995). In terms of influence tactics, individuals scoring high on conscientiousness should be more likely to use rational persuasion. As an influence tactic, rational persuasion is based on gathering factual evidence and then presenting it along with logical arguments. Thus, rational persuasion is consistent with a careful, practical, thorough, organized disposition. Conscientious individuals also should be less likely to use personal appeals because they are based on friendship and personal favors rather than task-focused productivity.

Hypothesis 5: Managers scoring high on conscientiousness will be (a) more likely to adopt upward influence tactics that emphasize rational persuasion and (b) less likely to adopt upward influence tactics that emphasize personal appeal.

Managers' influence tactics and targets' leadership styles

A target's leadership style can be interpreted as an overt signal about how he or she relates to others. This study examines how managers' influence tactic strategies are related to targets'—their supervisors'—leadership styles by focusing on two extremes in terms of leadership. On one side of the continuum are transformational leaders who use inspirational motivation—stimulating others to action by articulating a clear, appealing, and inspiring vision (Bass, 1985). Vision is the common element in virtually every theory of transformational or charismatic leadership (House & Shamir, 1993). In Bass and Avolio's (1994) Full Range of Leadership Model, inspirational motivation (with idealized influence) tends to be the most effective leadership behavior, displaying strong correlations with both subjective and objective measures of leadership effectiveness (Lowe et al., 1996).

On the other side of the continuum are transactional leaders who display relatively low forms of leadership activity, with the lowest activity levels exhibited by 'laissez-faire' leaders (Bass, 1985). Clearly, not all forms of transactional leadership are ineffective. For example, leaders who engage in contingent reward behaviors are more effective than those who do not (Atwater, Camobreco, Dionne, Avolio, & Lau, 1997). Laissez-faire leadership, however, tends to be the least effective leadership behavior, displaying negative correlations with leadership effectiveness (Lowe et al., 1996). Thus, Northouse (1997, p. 134) places transformational–transactional leadership along a continuum, with laissez-faire being at the far end of less effective leadership. Judge and Bono (2000) likewise commented that laissez-faire leadership was the best example of inactive and thus ineffective leadership. Accordingly, the present study focuses on the end points of the leadership style continuum by studying influence tactic strategies as they relate to supervisory styles of inspirational motivation (along with idealized influence, the most effective leadership behavior) versus laissez-faire (the least effective behavior) leadership. Thus, the logic behind the leadership continuum allowed us to form predictions about the signals that leadership types would send to subordinates, and to type of influence tactics that subordinates would in turn use on the leaders.

Because inspirational leaders articulate appealing visions of the future and talk optimistically and enthusiastically about future improvements, their behavior likely sends a signal that they too would resonate with an enthusiastic appeal to personal values or an exciting challenge. Thus, individuals wishing to influence a transformational leader should be more likely to employ tactics that emphasize inspirational appeals (e.g., using stirring, emotional language to build enthusiasm) over 'hard' influence tactics such as pressure tactics. Yukl (1998) notes, 'To formulate an appropriate (inspirational) appeal, the manager must have insight into the values, hopes, and fears of the person or group to be influenced' (p. 209). Since inspirational leaders espouse their values and vision (Bass, 1997),

individuals who are led by inspirational leaders should have greater insight into the values and vision of their leaders, increasing their salience of influence attempts based on these aspects. Likewise, individuals should be more likely to influence a transformational leader by getting them personally involved and committed to a project through consultation tactics, including asking the transformational leader to suggest ways to improve a proposal or help plan an activity, because transformational leaders use such involvement tactics themselves (Wofford & Goodwin, 1994). Thus,

Hypothesis 6: Managers trying to influence an inspirational leader will be more likely to adopt upward influence tactics that emphasize (a) consultation and (b) inspirational appeal.

As described above, the opposite of inspirational leaders are laissez-faire leaders, who avoid leadership responsibilities, are absent when needed, and who fail to follow up on requests for assistance (Bass, 1997). Obviously, an individual wishing to influence a laissez-faire leader will receive a different signal about the types of tactics that may be effective. Avolio and Bass (1994) note that laissez-faire leaders 'may simply fail to pick up relevant information or may send cues to others that they are not interested in receiving new information and ideas' (p. 210). Because 'soft' or 'rational' tactics will likely go unrecognized by a laissez-faire leader, individuals may be forced into using tactics that focus on inducing or even forcing the leader to respond to their requests. Thus, an individual may employ exchange tactics, including promises of future commitments and personal incentives, thereby focusing attention on the personal benefit that the target can gain by helping. Individuals seeking to influence laissez-faire leaders also should be more likely to employ coalition tactics, thereby trying to sway the leader to support their requests by using the strength that comes in numbers. Third, legitimizing tactics also may be efficacious for influencing laissez-faire leaders because while a target may not care personally about an individual's request, he or she may be forced to respond if the request is mandated by organizational policies, is sanctioned by higher-level management, or has been approved by another leader with more authority. Finally, pressure tactics may be the most effective strategy for influencing laissez-faire leaders because an individual may feel it necessary to use demands, persistence, and repeated requests when leaders 'sit and wait for others to take the necessary initiatives imposed by the tasks at hand' (Avolio, 1999, p. 38).

Hypothesis 7: Managers trying to influence a laissez-faire leader will be more likely to adopt upward influence tactics that emphasize (a) exchange, (b) coalition, (c) legitimizing, and (d) pressure.

Joint effects of personality and leader type

In addition to the direct effects of perceived leadership style hypothesized above, it is possible that personality traits interact with leadership style to determine choices between influence tactics. Although these hypotheses are grounded in the logic of the personality traits and leadership styles described above, they nevertheless represent an initial examination that may be used to build the literature in future research. First, we suggest that when an individual scores high on extraversion *and* perceives her leader as inspirational, she should be particularly likely to employ inspirational influence tactics with that leader because she is outgoing and would enjoy the interaction, and she would be likely to perceive that the leader would respond positively to an inspirational appeal. On the other hand, we expect this same profile—scoring high on extraversion *and* perceiving an inspirational leader—to lead to less use of rational persuasion because it runs counter to extraverts' natural tendencies while appearing less appropriate for influencing an inspirational leader. Next, we suggest that when an individual scores high on extraversion *and* perceives her leader as laissez-faire, she should

be more likely to employ exchange tactics or personal appeals with that leader because she would be propelled toward interacting with the leader but would need to use some interpersonal mechanism to get the leader's attention and help. Finally, we propose that when an individual scores high on conscientiousness *and* perceives her leader as laissez-faire, she should be more likely to employ legitimization tactics with that leader because this approach pushes the leader to action while still abiding by the formal rules of achievement in the organization. Based on this logic we hypothesize:

Hypothesis 8a: An individual who scores high on extraversion and perceives her leader as inspirational will be most likely to employ inspirational influence tactics and least likely to employ rational persuasion tactics.

Hypothesis 8b: An individual who scores high on extraversion and perceives her leader as laissez-faire will be most likely to employ exchange tactics and personal appeals.

Hypothesis 8c: An individual who scores high on conscientiousness and perceives her leader as laissez-faire will be most likely to employ legitimization tactics.

Control variables

To provide more accurate estimates of the hypothesized relationships described above, we controlled for managers' sex, race, and age, because social stereotypes may cause people with different demographics to feel that some tactics are more appropriate for them (Brenner & Vinacke, 1979; Vecchio & Sussmann, 1991). We also examined organizational tenure, because managers may be able to expand their repertoire of tactics the longer they have worked at an organization. Finally, managers' job types (e.g., sales versus finance) were controlled due to the possibility of occupational norms.

Organizational Context

To maximize the generalizability of the results, we studied a large sample of managers at different stages of their careers in many different organizations. In 1999 we distributed surveys to a sample of 1501 individuals who had received their MBAs over the last 10 years at a business school in the Southeast. Given that all respondents had their MBAs, most had relatively high degrees of mobility either within their organization or between organizations. The average respondent was 36 years old, earned \$304 021 in total pay, was 3.5 levels below CEO, and had worked at his or her current organization 2.5 years. Respondents worked in a broad representation of functional areas, including human resources, accounting, operations, marketing, strategy, sales, research and development, and general management. In terms of the industries where respondents worked, 40 per cent were service, 25 per cent were high technology, 6 per cent were health care, 6 per cent were government, education, or non-profit, 5 per cent were food and beverage, 2 per cent were consumer durable goods and 2 per cent were entertainment. Fifty-eight per cent of the organizations where respondents worked were publicly held, and the average revenues were about \$11 000 000 000. In terms of the economy during the study, in 1999 the United States was coming off five years of economic expansion and the 'internet boom', and the economic climate was still strong during our first survey in 1999. The economic climate had worsened before the Wave 2 follow-up survey.

Method

Sample

We distributed a survey and prepaid return envelopes to a random sample of 1501 individuals who had received their MBAs over the last 10 years at a business school in the Southeast. This survey assessed individuals' demographics and personality traits. Five hundred and ninety-nine people (40 per cent) responded, although we eliminated 20 respondents because they did not provide information to track them for the second wave of the survey. One year later, we sent a second survey to each of the 553 individuals who could be identified from the first wave of the survey, and for whom accurate addresses were available (26 individuals had since moved with no forwarding address). The second survey first assessed respondents' use of influence tactics with their supervisors, and then measured their supervisors' leadership styles.

Of the 553 individuals who received the second survey, 258 (47 per cent) responded. Unfortunately, due to coding errors we were not able to match 33 of the respondents and we eliminated these data. Moreover, 21 additional respondents did not rate their supervisors' leadership styles, leaving a final usable sample of 189. Seventy per cent of the respondents were male, 88 per cent were Caucasian, 4.5 per cent were Hispanic, 3 per cent were African-American, and 3 per cent were Asian. The average respondent was 36 years old, had worked at his or her organization 2.5 years, earned \$304 021 in total pay, and was 3.5 levels below CEO. The average respondent was 36 years old (ranging from 23 to 63 years), and had worked at his or her current organization 2.5 years. Participants worked in a broad representation of functional areas (e.g., finance, human resources, etc.). In terms of the industries where respondents worked, 40 per cent were service, 25 per cent were high technology, 6 per cent were health care, 6 per cent were government, education, or non-profit, 5 per cent were food and beverage, 2 per cent were consumer durable goods and 2 per cent were entertainment. Fifty-eight per cent of the organizations where respondents worked were publicly held, and the average revenues were about \$11 000 000 000. To examine whether respondents were representative of our target sample, we used *t*-tests to compare all relevant data on individuals who did and did not respond to Wave 2 (e.g., sex, age, tenure, extraversion, openness, emotional stability, agreeableness, conscientiousness, organizational revenues, public versus private firm). No significant differences were found between the two groups on any variable except conscientiousness (conscientious individuals were more likely to respond to the second survey), suggesting that respondents generally were representative of our target population.

Measures

Functional job area

Respondents rated the degree to which their position entailed responsibilities in different functional areas (each respondent could report responsibilities in multiple functional areas). On a 7-point scale (ranging from 1 = none to 7 = all) the average responses were: finance, 4.2; human resources, 3.2; accounting, 3.2; operations, 4.0; marketing, 4.6; strategy, 5.0; sales, 4.2; research and development, 2.4; and general management, 4.8. Most respondents had responsibilities in more than one of these areas, and responses to some areas were highly correlated (e.g., sales and marketing, accounting and finance). A principal components factor analysis with varimax rotation revealed three clearly interpretable factors with Eigenvalues greater than 1.0 that accounted for 68 per cent of the total variance.

The factors were management (general management, human resources, and operations), marketing (sales, marketing, and strategy), and finance (finance and accounting). These three standardized factor scores are used to control for functional job area in the analyses.

Big Five personality traits

The Big Five personality traits were measured with a subset of the 240-item NEO personality inventory—(revised NEO-PI-R), the most extensively validated measure of the five-factor model (Costa & McCrae, 1992). Although we could not use the full 240 items due to the length of the survey, we used 15 items to measure each personality trait. Example statements are: ‘I’m known as a warm and friendly person’ (extraversion), ‘I consider myself broad-minded and tolerant of other people’s lifestyles’ (openness); ‘I am always able to keep my feelings under control’ (emotional stability); ‘I go out of my way to help others if I can’ (agreeableness); and ‘I work hard to accomplish my goals’ (conscientiousness). Responses were anchored on a 1 = *strongly disagree* to 7 = *strongly agree* scale. Internal consistency reliabilities (α) for the scales were as follows: extraversion $\alpha = 0.75$; openness $\alpha = 0.76$; emotional stability $\alpha = 0.78$; conscientiousness $\alpha = 0.77$; agreeableness $\alpha = 0.78$. These reliabilities are consistent with past research on the Big 5 (Costa & McCrae, 1992), where the average is 0.77 across traits.

Upward influence tactics

Upward influence tactics were measured with the 1998 agent version of the Influence Behavior Questionnaire (IBQ) developed by Yukl and his colleagues (e.g., Yukl & Tracey, 1992). We adapted the response scale from a 5-point to a 7-point scale to be consistent with the personality inventory. Respondents were told to select one particular supervisor and report how much they used each behavior over the last year to influence that specific person. The 7-point response scale ranged from 1 = ‘I can’t ever remember using this behavior with the person’ to 7 = ‘I use this behavior very often with the person.’ The IBQ measures nine influence tactics (described in the hypotheses section). The internal consistency reliabilities for the scales were as follows: rational persuasion, $\alpha = 0.81$; consultation, $\alpha = 0.81$; inspirational appeal, $\alpha = 0.83$; ingratiation, $\alpha = 0.90$; personal appeal, $\alpha = 0.84$; exchange, $\alpha = 0.88$; legitimizing, $\alpha = 0.79$; pressure, $\alpha = 0.82$; coalition, $\alpha = 0.85$.

Leadership behaviors

Leadership behaviors were measured with the MLQ (Form 5x), the most frequently used measure of transformational leadership (Bass, 1985; Judge & Bono, 2000). We specifically asked respondents to report the style of the *same* leader who they had in mind when they described their use of influence tactics. This study focused on inspirational motivation (‘articulates a compelling vision of the future’) and laissez-faire (‘fails to follow-up requests for assistance’). Each of these scales has four items. Internal consistency reliabilities for the scales were $\alpha = 0.87$ for inspirational motivation and $\alpha = 0.82$ for laissez-faire.

In the survey, we presented the influence tactic scales prior to the leadership scales. To determine whether the order of presentation of the influence tactic and leadership scales influenced responses, we gathered additional data from a new sample of MBA students where we counterbalanced the two scales. Of the 41 respondents, 23 received the influence tactic items first and 18 received the leadership items first. Results from *t*-tests revealed that none of the nine influence tactics or the leadership responses was significantly different between the conditions (all $p > 0.20$), suggesting that there were no order effects.

Results

Table 1 presents the means, standard deviations, and correlations of the variables examined in this study, with the reliability coefficients on the diagonal. Table 2 presents the results from a series of ordinary least squares (OLS) regression analyses, where each of the influence tactics was regressed on all of the predictor variables (including controls, personality traits, and target leadership styles). Next, we review the results from the control variables, we present the evidence for the hypotheses, and we conclude with a review of the non-hypothesized results that emerged from the analyses.

Regarding the control variables, results revealed that although women were more likely to employ rational persuasion, they were less likely to employ most other tactics, including consultation, ingratiation, personal appeal, exchange, and pressure tactics. African-Americans were more likely to use exchange tactics, and older individuals were more likely to use exchange and legitimization tactics. Individuals with more organizational tenure were less likely to use exchange tactics. Results showed that individuals working in sales and marketing were more likely to use tactics that emphasized inspirational appeal, ingratiation, personal appeal, and exchange. Individuals working in finance and accounting were more likely to use tactics that emphasized consultation, ingratiation, exchange, legitimization, and pressure.

With regard to the personality traits, results revealed that managers who scored high on extraversion were more likely to adopt upward influence tactics that emphasized inspirational appeal ($\beta = 0.26$, $p < 0.01$) and ingratiation ($\beta = 0.18$, $p < 0.05$), providing support for Hypotheses 1a and 1b. However, extraversion scores were not related to personal appeal tactics, so Hypothesis 1c was not supported. Results did not support Hypothesis 2a: scores on the openness scale were unrelated to inspirational appeal tactics. On the other hand, results did suggest that openness scores were inversely related to coalition tactics ($\beta = -0.13$, $p < 0.10$), providing some support for Hypothesis 2b. Next, results revealed that managers' emotional stability scores were positively related to rational appeal tactics ($\beta = 0.17$, $p < 0.05$) and negatively related to inspirational appeal tactics ($\beta = -0.18$, $p < 0.05$), providing support for Hypotheses 3a and 3b. For Agreeableness, results supported both Hypotheses 4a and 4b. Thus, people scoring higher in agreeableness were less likely to employ legitimizing ($\beta = -0.14$, $p < 0.10$) and pressure influence tactics ($\beta = -0.14$, $p < 0.05$). Finally, results supported Hypotheses 5a but not 5b: higher conscientiousness scores were related to greater use of rational appeal tactics ($\beta = 0.31$, $p < 0.01$) but were not related to personal appeal tactics.

Turning to the relationships between managers' upward influence tactics and their supervisors' leadership styles, results supported Hypotheses 6a and 6b. Thus, when they tried to influence transformational leaders, individuals were more likely to employ influence tactics that emphasize consultation ($\beta = 0.25$, $p < 0.01$) and inspirational appeal ($\beta = 0.33$, $p < 0.01$). On the other hand, results suggested that when individuals try to influence laissez-faire leaders, they are more likely to employ tactics that emphasize exchange ($\beta = 0.25$, $p < 0.01$), coalition ($\beta = 0.39$, $p < 0.01$), legitimization ($\beta = 0.18$, $p < 0.05$), and direct pressure ($\beta = 0.30$, $p < 0.01$). Thus, results supported Hypotheses 7a–d.

Interactions

To examine the joint effects of personality and leadership perceptions, we followed the procedures recommended by Aiken and West (1991). Thus, we centered the personality variables and influence tactic variables by subtracting their means, then computed the three hypothesized interaction terms as the cross-product of the centered variables. We included all of the variables in one regression equation. Hypothesis 8a received partial support, as individuals who scored high on extraversion and who

Table 1. Means, standard deviations, and correlations among personality traits, leadership style, and upward influence tactics

	M	SD	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23
1. Sex (1 = female)	0.27	0.44	—																						
2. Race (1 = minority)	0.14	0.34	0.18	—																					
3. Age	36.00	5.44	-0.06	-0.10	—																				
4. Organization tenure	5.60	2.90	-0.07	-0.17	0.56	—																			
5. Management	0.00	1.00	-0.13	0.01	-0.01	-0.06	—																		
6. Marketing	0.00	1.00	-0.10	-0.11	-0.06	0.00	-0.03	—																	
7. Finance	0.00	1.00	-0.08	-0.16	-0.07	-0.09	-0.16	0.06	—																
8. Extraversion	4.75	0.64	0.17	-0.02	0.02	-0.01	0.06	0.29	-0.11	0.75	—														
9. Openness	4.54	0.71	0.04	0.04	-0.01	-0.04	0.06	0.04	0.04	0.26	0.76	—													
10. Emotional stability	5.01	0.71	-0.14	-0.02	-0.10	0.00	0.16	0.11	-0.06	0.32	-0.05	0.78	—												
11. Agreeableness	4.81	0.67	0.20	-0.05	0.08	0.03	-0.09	-0.05	-0.16	-0.02	0.08	-0.02	0.78	—											
12. Conscientiousness	5.07	0.58	0.01	0.10	0.01	-0.02	0.05	0.01	0.08	0.03	-0.17	0.26	-0.01	0.77	—										
13. Inspirational motivation	5.04	1.19	0.10	0.01	-0.11	-0.15	0.18	0.04	-0.11	0.07	0.10	0.10	0.16	-0.07	0.87	—									
14. Laissez faire	2.10	1.01	0.01	-0.08	0.15	0.19	-0.10	-0.11	0.08	-0.05	-0.11	-0.03	-0.11	0.15	-0.39	0.82	—								
15. Rational persuasion	5.72	0.83	0.13	0.17	-0.01	-0.12	0.01	0.00	0.03	0.13	0.10	0.19	-0.02	0.31	0.09	0.08	0.81	—							
16. Consultation	4.85	1.15	-0.11	0.03	-0.07	-0.11	0.05	0.12	0.16	0.07	0.05	0.00	-0.07	0.00	0.25	-0.18	0.36	0.81	—						
17. Inspirational appeal	4.17	1.25	0.09	0.06	0.02	-0.03	0.11	0.29	-0.10	0.31	0.11	-0.02	-0.07	0.10	0.30	-0.06	0.21	0.38	0.83	—					
18. Ingratiation	4.17	1.51	-0.13	-0.03	0.00	-0.06	0.03	0.26	0.19	0.13	0.00	-0.07	-0.07	0.01	0.11	-0.04	0.14	0.61	0.43	0.90	—				
19. Personal appeal	2.62	1.20	-0.10	0.02	-0.05	-0.03	0.00	0.13	0.11	-0.10	-0.09	-0.24	-0.15	-0.14	-0.01	0.06	-0.17	0.10	0.12	0.36	0.84	—			
20. Exchange	2.13	1.07	-0.10	0.02	0.06	-0.10	-0.03	0.17	0.21	0.02	-0.02	-0.15	-0.22	-0.12	-0.04	0.18	0.02	0.20	0.21	0.41	0.54	0.88	—		
21. Coalition	2.39	1.09	-0.05	-0.07	0.01	0.08	0.02	0.07	0.12	-0.01	-0.13	0.00	-0.10	0.07	0.00	0.34	0.09	0.03	0.22	0.24	0.23	0.42	0.79	—	
22. Legitimizing	2.64	1.18	-0.08	0.05	0.18	0.05	-0.03	-0.06	0.20	-0.04	0.00	-0.05	-0.18	0.04	0.02	0.17	0.18	0.10	0.25	0.18	0.30	0.38	0.46	0.82	—
23. Pressure	2.06	0.97	-0.17	0.06	0.01	-0.03	-0.07	0.08	0.23	-0.06	-0.10	-0.11	-0.28	0.03	-0.19	0.30	0.16	0.14	0.16	0.29	0.33	0.45	0.53	0.85	0.85

Notes: $n = 189$. For $r = 0.14$, $p < 0.05$. For $r = 0.18$, $p < 0.01$. Reliabilities appear on the diagonal in **boldface** type.

Table 2. Relationships between personality traits, leadership style, and upward influence tactics

	Rational persuasion	Consultation	Inspirational appeal	Ingratiation	Personal appeal	Exchange	Coalition	Legitimizing	Pressure
Control variables									
Sex (1 = female)	0.145*	-0.135*	0.047	-0.148 [†]	-0.143*	-0.141*	-0.029	-0.095	-0.160*
African-American	-0.059	0.038	0.082	0.156	0.205	0.243*	0.023	0.150	0.077
Hispanic	-0.013	0.001	0.229	0.258	0.067	0.101	0.101	0.085	0.158
Caucasian	-0.174	-0.039	0.198	0.276	0.149	0.172	0.075	0.123	0.092
Asian	-0.032	0.016	0.155	0.162	0.183	0.178	0.022	0.225	0.190
Age	0.098	-0.017	0.048	0.042	-0.061	0.171 [†]	-0.060	0.230 [‡]	0.026
Organization tenure	-0.129	-0.019	0.002	-0.054	0.006	-0.202 [†]	0.080	-0.053	-0.068
Management	-0.064	-0.017	0.070	0.028	0.031	-0.017	0.058	-0.027	-0.013
Marketing	-0.021	0.020	0.225	0.173 [†]	0.138*	0.164 [†]	0.106	-0.082	0.066
Finance	0.044	0.196 [‡]	-0.082	0.194 [†]	0.106	0.180 [†]	0.110	0.205 [‡]	0.171 [†]
Personality traits									
Extraversion	0.034	0.117	0.256[‡]	0.177[†]	0.009	0.078	0.025	0.045	0.052
Openness	0.139*	-0.006	0.015	-0.096	-0.100	-0.040	-0.132*	0.012	-0.092
Emotional stability	0.174[†]	-0.069	-0.183[†]	-0.167 [†]	-0.258 [†]	-0.133*	-0.047	-0.012	-0.092
Agreeableness	-0.043	-0.046	-0.089	-0.005	-0.094	-0.142 [†]	-0.042	-0.139*	-0.142[†]
Conscientiousness	0.308[†]	0.073	0.159 [†]	0.042	-0.110	-0.154 [†]	-0.004	0.012	-0.030
Supervisor's leadership style									
Inspirational motivation	0.107	0.245[‡]	0.332[‡]	0.163 [†]	0.085	0.093	0.195 [†]	0.159 [†]	-0.014
Laissez faire	0.081	-0.100	0.075	0.020	0.105	0.249[‡]	0.391[†]	0.184[†]	0.303[‡]
Joint effects									
Extraversion*Inspirational	-0.255[†]	-0.267 [†]	-0.048	-0.124	-0.059	-0.027	0.044	-0.060	-0.069
Extraversion*Laissez faire	-0.042	0.020	-0.021	0.105	0.040	-0.004	-0.009	-0.072	-0.024
Conscientiousness*Laissez faire	0.034	-0.053	-0.032	-0.056	-0.008	-0.080	0.047	-0.050	-0.093
R	0.50 [†]	0.48 [†]	0.56 [†]	0.47 [†]	0.43 [†]	0.50 [†]	0.44 [†]	0.43 [†]	0.52 [†]
R ²	0.25 [†]	0.23 [†]	0.31 [†]	0.22 [†]	0.19 [†]	0.25 [†]	0.19 [†]	0.18 [†]	0.27 [†]

Notes: n = 189. *p < 0.10 (two-tailed); †p < 0.05 (two-tailed); ‡p < 0.01 (two-tailed). Hypothesized relationships are highlighted in **boldface** type.

perceived their leaders as inspirational were least likely to employ rational persuasion ($\beta = 0.26$, $p < 0.01$); however, there was no relationship with inspirational influence tactics. Neither of the other interaction hypotheses were supported by the data ($p > 0.20$). Thus, Hypotheses 8b and 8c were not supported.

In total, 15 of the 20 hypothesized relationships (75 per cent) were supported by the data. As shown in Table 2, 10 of the 46 (22 per cent) non-hypothesized relationships concerning the personality traits and target leadership styles were significant. Specifically, results revealed that openness scores were related to rational appeal, and that emotional stability scores were related to ingratiation, personal appeal, and exchange. Individuals scoring high in agreeableness were less likely to use exchange tactics, while those scoring high in conscientiousness were more likely to use inspirational appeal and less likely to use exchange tactics. Finally, results showed that managers trying to influence inspirational leaders were more likely to employ ingratiation, coalition, and legitimization tactics.

Personality profile analyses

Like most Big Five research in organizational behavior, we studied the effect of individual traits on outcomes (in this case, influence behaviors). However, it also is possible that profiles or constellations of the Big Five traits exert more powerful effects on people's choices among influence tactics. For example, an individual scoring high (i.e., above average) across all five of traits may choose different influence tactics than someone who scores low on agreeableness and conscientiousness (or some other combination of traits). Similarly, there may be interactions among the traits such that, for example, someone who scores high on neuroticism *and* low on agreeableness is *most* likely to use pressure tactics.

Although it is difficult to specify in advance which particular collections of personality traits would be most likely to lead to certain influence tactic choices, we examined these relationships in an exploratory fashion. Thus, to investigate the relationships between different Big Five profiles and influence tactics, we needed a way to represent and analyse each possible unique personality profile. To this end, recognizing the limitations in dichotomizing variables, we placed each individual into a high or low category in each of the five personality traits. We then created a variable that represented every possible combination of personality traits ($2^5 = 32$ combinations). Next, we performed one-way analyses of variance (ANOVA) across each of the influence tactics where the factor was the variable representing the 32 possible combinations of personality traits.

Results from this profile analysis were not particularly compelling. Across the nine influence behaviors, only two of the one-way ANOVAs were significant: rational persuasion and personal appeal. We conducted *post hoc* tests on these two significant findings to ascertain whether trends of particular constellations emerged in an interpretable fashion. Unfortunately, no trends seemed to link the results together, other than the direct relationships already revealed by the regression results presented in Table 2 (i.e., we found that conscientious people were more likely to use rational persuasion, regardless of the constellation of traits a person possessed).

A second way to examine the effects of personality trait combinations is to test how interactions between personality traits predict influence tactics. Thus, following the procedures recommended by Aiken and West (1991), we centered the five personality variables by subtracting their means, computed the ten possible interaction terms as the cross-product of these centered variables, and included all variables in a regression equation. Results revealed that the block of ten interaction terms did not account for a significant amount of variance across any of the influence tactics (all $p > 0.10$). In fact, of the 90 possible relationships (10 interactions \times 9 influence tactics), only six particular interaction terms were significant (7 per cent). Specifically, results revealed that individuals scoring high in both emotional stability and agreeableness were more likely to engage in coalition tactics and legitimization

tactics ($p < 0.05$). Individuals scoring high in both emotional stability and openness were less likely to engage in legitimization tactics ($p < 0.05$). Individuals scoring high in both emotional stability and conscientiousness were less likely to engage in exchange tactics and more likely to engage in personal appeals ($p < 0.01$). Individuals scoring high in both extraversion and conscientiousness were more likely to engage in rational persuasion tactics ($p < 0.05$).

Discussion

Influence tactics obviously have implications for individual managers because some tactics are more effective than others (e.g., Falbe & Yukl, 1992), but also have important ramifications for the culture and the types of interpersonal interactions that differentiate one firm from another. The goal of this paper was to extend past research on the antecedents of influence tactics by examining the five-factor model of personality traits and targets' leadership styles. In general, results supported the nomological network of relationships suggested by the five-factor model of personality. For example, extraverts were more likely to engage in outgoing, expressive tactics such as inspirational appeal and ingratiation, while individuals scoring high in agreeableness resisted confrontational tactics such as legitimization and pressure. Most hypothesized relationships regarding the five-factor personality model were supported, while only 20 per cent of the non-hypothesized relationships were significant. Thus, even with the predictors and outcomes separated by one year, results supported both the convergent and discriminant validity of personality traits as predictors of managers' influence tactics. These results are important because most past research suggests that influence tactic strategies depend on the particular goal that individuals are trying to achieve (Ansari & Kapoor, 1987; Mowday, 1978; Yukl & Falbe, 1990), or whether the target is a peer, subordinate, or supervisor (Kipnis, Schmidt, & Wilkinson, 1980; Yukl & Tracey, 1992; Yukl & Falbe, 1991). The present study thus extends past research by suggesting that managers' choices of influence tactics also is a function of their disposition, beyond their specific task or target. Consistent with the literature on person-organization fit (Cable & Judge, 1997; Schneider, 1987), these results imply that firms may have some degree of control over the types of workforce interactions and influence tactics that occur through the types of people they select.

Several non-hypothesized findings further suggest the relationship between personality traits and influence tactics. For example, individuals scoring high on emotional stability were more likely to use ingratiation, personal appeal, and exchange. On one hand, emotionally stable individuals may be willing to try more influence tactics, in general, since they probably possess more confidence and control in their ability to interact and negotiate with others. Since these three non-hypothesized tactics all rely on trading the leader something (ranging from praise to friendship to desired outcomes) for his or her attentions, these results may suggest that emotionally stable individuals view trades as more effective than neurotic individuals who have less confidence and control over their emotions. Also, neurotic individuals may have less to trade, at least in the realm of personal credibility and friendship.

Controlling for managers' personality traits, results also supported the general proposition that managers tailor their choices of upward influence tactics to the leadership styles exhibited by their targets. For example, transformational leaders who try to instil a vision of the future are more likely to receive influence attempts that get them involved in the process through consultation, or that appeal to their values as a chance to do something exciting. Conversely, laissez-faire leaders will be more likely to receive influence attempts that seek to exchange personal benefits for attention to a request, or insistent demands that a request be met. These results suggest that individuals observe their targets' leadership styles as signals about what tactics would be most effective, or how targets prefer to be influenced.

Thus, the present study extends the only existing study of leadership styles and influence tactics (Ansari & Kapoor, 1987) by examining a wider range of influence tactics and by showing that the phenomenon generalizes beyond a laboratory study of students to actual managers trying to accomplish goals over the course of a year.

Interestingly, managers who regard their leaders as inspirational are more likely to use *many* different types of influence tactics. Thus, in addition to the two hypothesized relationships that were supported, results revealed that managers with inspirational leaders were more likely to employ ingratiation, coalition, and legitimization tactics. Managers with inspirational leaders may be more likely to use influence tactics in general because they have developed a better or closer relationship with their leaders and are more comfortable about approaching them. Extending this logic to the research literature, future research may reveal that leader–member exchange is related to the number and types of influence tactics that managers use.

Regarding the interactions between personality and perceived leadership style, results revealed little support for the hypotheses. Although we did find that individuals who scored high on extraversion and who perceived their leaders as inspirational were least likely to employ rational persuasion, the other interaction hypotheses were not supported. Possibly, the interactive effect sizes are small relative to the direct effects, such that a larger sample would reveal more significant relationships. Also, the dichotomization process may help explain the poor validity of the profile analysis, though we see no better way to conduct such an analysis with these data.

Finally, the data also revealed some interesting results concerning job type that may help inform future research. Specifically, managers working in marketing-oriented positions were more likely to use influence tactics that have been characterized as ‘soft’ (e.g., inspirational, ingratiation), while managers working in finance and accounting were more likely to employ ‘hard’ influence tactics (e.g., legitimization, direct pressure). These results reveal interpersonal influence norms that seem to prevail in certain job types, regardless of an individual’s personality or the leadership style exhibited by targets. Also, consistent with Schneider’s (1987) Attraction–Selection–Attrition framework, certain types of people may be attracted to jobs in which their influence tactic styles are compatible with the existing norms in that area of work. Finally, it would be interesting for future research to examine whether type of work moderates the effectiveness of different influence tactic strategies.

Limitations

This study has several shortcomings, including the possibility of self-report bias. On the one hand, managers appear to be the best equipped to report their own personalities, beliefs about targets’ leadership styles, and attempted influence tactics. While we sought to mitigate concerns about self-report biases by separating the personality and influence tactics surveys by one year, priming effects still may have occurred between manager’s reports of their influence tactics and their reports of supervisors’ leadership styles. On the other hand, Crompton and Wagner’s (1994) analysis of the inflation produced by common method variance suggests that it produces a small, inconsistent degree of inflation with studies involving personality. Indeed, in their meta-analysis, the average level of inflation was 0.04 when personality and a criterion were measured with a common source, and it is unlikely that the measure of the personality and criterion were separated by one year as was the case here. Thus, though the possibility of common method variance must be acknowledged, it seems unlikely to fully explain the results observed herein. In our second survey, it would have been useful to counterbalance the questions regarding influence tactics and perceived leadership traits so that we could have tested for order effects. Future research is needed to confirm this initial study of the relationships between leadership style and influence tactics.

Also, this study only examined two of the eight styles of leadership that comprise the transformational–transactional continuum (Bass, 1998). Unfortunately, space constraints on our survey necessitated a small subset of the entire scales. Although we tried to pick the two extremes in terms of leadership styles to illustrate possible differences in influence tactics (Bass, 1997), it nevertheless would be interesting to examine whether other leadership styles elicit other types of influence tactics from managers. For example, managers may be more likely to employ rational persuasion with targets who use ‘intellectual stimulation’ to lead others. Thus, future research is needed to extend the nomological network between influence tactics and target leadership style.

Implications

For managers, these results suggest that there is an important relationship between their own personality traits and their tendencies toward certain upward influence tactics. These results may help managers rethink whether their use of certain tactics is based on their dispositions or the tactics they have observed to be the most successful in their organizations. Because behavioral tactics can be changed easier than dispositions, managers may benefit from greater awareness of the menu of tactics that is available to them, learning to enact more effective tactics even if it is not their initial tendency.

Additionally, this study suggests influence tactics as a criterion that leaders should consider when adopting leadership styles with subordinates. Results suggested that subordinates interpreted leadership styles as signals about the tactics that it would take to gain leaders’ support and help with requests. Thus, leaders’ working styles with others may create self-fulfilling prophecies such that inspirational leaders are more likely to receive positive interactions which makes them even more likely to exhibit inspirational leadership behaviors in the future. Laissez-faire leaders, conversely, may become disillusioned with subordinates who push, prod, and cajole them to respond to requests, resulting in even less future motivation to be a dynamic or inspirational leader.

From an organizational perspective, certain workforce interaction styles may help reinforce a desired culture. The linkages revealed in this study between individuals’ personality traits and their influence tactics suggest another way for firms to use personality tests to predict employees’ contextual performance (Goffin, Rothstein, & Johnston, 1996), and to hire people that fit the organizational culture. Also, firms may find that investments in leadership training change the bottom-up influence process and interaction patterns that exist in the organization.

In summary, the process of influencing other people is an important element of managerial life. This study contributes to our knowledge of influence tactics in that it demonstrates relationships between the five-factor model of personality and upward influence tactics. In addition to this dispositional perspective on influence tactic strategies, the present paper also showed target leadership style as an important situational signal that managers attend to when choosing influence tactics. These results were obtained from a sample of managers from over 140 different companies, in a large number of industries, and representing a wide range of age, race, sex, and job types. Thus, the findings should be applicable to most managers, and we can be confident that influence tactic strategies were not just a function of a specific organization’s, industry’s, or occupation’s norms.

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