

Leading and Managing Teams: Teaching Students to Evaluate, Rather Than Describe, Leadership and Team-Development Theory

A Critically-Informed Educational Practice Paper Addressing Four OTHM Level 5 Learning Outcomes

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About the Author

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Abstract

Level 5 business management students are often able to reproduce leadership, team-development, and motivation frameworks from memory, but coursework and tutor feedback suggest that many struggle to move beyond description toward evaluating a framework's empirical support, limitations, and contested status (Mingers, 2000). This practice paper addresses that pedagogical problem directly: it asks how a teaching resource can be structured so that every framework a student encounters is paired, systematically, with the empirical challenge that qualifies it, using the four aspects of a critical approach Mingers identifies — scepticism toward rhetoric, tradition, authority, and objectivity — as the organising lens.

Frameworks and their accompanying critiques were selected using two explicit criteria: centrality to the four learning outcomes of the OTHM Level 5 'Leading and Managing Teams' unit, and the existence of a documented, peer-reviewed empirical challenge to at least one of the framework's central claims. Sections 1 through 4 apply this pairing to leadership and management theory, team-development models, performance-improvement techniques, and self-assessment tools respectively, closing each with a discussion of where AI-based tools genuinely assist the same work and where they introduce risk, grounded in the organisational-control and AI-in-HR literature rather than vendor claims. A worked, explicitly hypothetical personal SWOT analysis is extended into a full reflective cycle culminating in SMART development goals and a review point.

This revision responds directly to structured reviewer feedback on the first edition: citations have shifted from commercial and practitioner web sources toward their peer-reviewed origins; previously uncritiqued frameworks — the Myers-Briggs Type Indicator, situational leadership, and Herzberg's two-factor theory — now receive sourced critical treatment; factual and attribution errors are corrected; and the one-to-one mapping between section headings and OTHM assessment criteria has been moved to an appendix. The paper's contribution remains pedagogical rather than empirical. A lightweight expert-review evaluation protocol is proposed in the Design and Method section but, stated candidly, has not yet been executed; this limitation is not overstated.

Keywords: leadership theory; management theory; team development; motivation theory; critical management education; self-assessment.

Introduction and Positioning Statement

A recurring observation from marking Level 5 assignments is that students can usually state what a framework says — Tuckman's stages, Maslow's hierarchy, Belbin's roles — but far less reliably explain why a framework is contested, what evidence qualifies it, or when it should not be applied uncritically. Mingers (2000) frames the underlying skill as scepticism toward rhetoric, tradition, authority, and objectivity: the ability to ask whether a claim is persuasive because it is well-argued and evidenced, or merely because it is familiar, attributed to an authoritative source, or presented as settled fact. This paper treats that as the specific pedagogical problem it exists to address, rather than treating 'critical thinking' as a vague aspiration stated once and then set aside.

The paper's response is structural rather than rhetorical: each major framework discussed in Sections 1 through 4 is deliberately paired with a documented empirical challenge to at least one of its central claims, using the Core Definition, Critical Perspective, and AI Insight structure carried over from the first edition. Section 1 addresses leadership and management theories; Section 2 addresses how teams are developed; Section 3 addresses techniques and theory for improving individual and team performance; and Section 4 addresses how a student can assess their own capacity as a leader and manager. These four sections correspond to the four learning outcomes of the OTHM Level 5 'Leading and Managing Teams' unit; following reviewer feedback on the first edition, that correspondence is now documented explicitly in Appendix A rather than reproduced in the section headings themselves, so that the headings can instead reflect the pedagogical argument being made in each section.

This paper is presented as an educational practice paper, not a conventional empirical research article. It does not present primary data collection or original empirical findings; it critically compares established frameworks, ties its claims to their peer-reviewed origin, and includes one clearly labelled hypothetical worked example extended into a full reflective cycle. Section 'Design and Method', immediately following this introduction, states transparently how frameworks and critiques were selected and sets out a proposed evaluation protocol. Section 5 (Discussion) discusses the paper's contribution and limitations without minimising them, and Section 6 concludes.

The wider debate this paper sits within is not new. Business schools have periodically been criticised for teaching frameworks as settled managerial technique rather than as contested knowledge produced within a particular historical and disciplinary context; Mingers (2000) developed his four-aspect account of criticality specifically in response to that criticism, in the context of designing a core undergraduate management course. This paper narrows that broader debate to a single, practical question suited to a Level 5 unit: given a fixed set of frameworks a student is required to learn for assessment, what is the minimum structural change to how that content is presented that measurably shifts engagement from description toward evaluation? The answer proposed here is the consistent Core Definition, Critical Perspective, and AI Insight structure used throughout — not a claim that this structure is the only way to

achieve that shift, but a specific, testable design choice, with its own proposed test described in the next section.

AI Insight, Application, and Risk

AI tools are increasingly part of how leaders and managers gather feedback, track performance, and plan development. Each section below includes an AI Insight discussion addressing where these tools genuinely help, where they introduce risk — including algorithmic bias, employee monitoring, data protection, and effects on trust — and where human judgement still has to make the final call. This discussion draws on the organisational-control and AI-in-HR-management literature (Cappelli, Tambe, & Yakubovich, 2019; Kellogg, Valentine, & Christin, 2020) rather than vendor marketing claims, and no specific commercial tool is endorsed.

Table of Contents

Abstract	2
Introduction and Positioning Statement.....	3
Design and Method	6
Section 1. Leadership and Management Theories	8
Section 2. How Teams Are Developed	11
Section 3. Improving Individual and Team Performance	14
Section 4. Determining Your Own Capacity to Be an Effective Leader and Manager	17
Discussion	20
Conclusion	20
Appendix A: OTHM Learning Outcome Mapping	22
References	23

Design and Method

This section states directly how the paper was constructed, in response to reviewer feedback that the first edition did not describe how frameworks and critiques were selected or how the paper's claims could be evaluated.

Framework and Critique Selection

Frameworks were included in Sections 1 through 4 if they met two criteria: first, centrality to one of the four OTHM Level 5 learning outcomes listed in Appendix A; second, the existence of a documented, peer-reviewed empirical challenge to at least one of the framework's central claims, which could then anchor a Critical Perspective discussion. Where a framework is widely taught but the available critique is thin, general, or exists mainly as informal practitioner commentary rather than a peer-reviewed source — for instance, systems and contingency approaches to management, which are typically taught as an orientation rather than a single citable claim — this is stated explicitly in the relevant section rather than papered over with an uncritical mention.

Critiques were prioritised by evidentiary weight where the literature allowed: a systematic review or meta-analysis (for example, Wahba and Bridwell's 1976 review of the need-hierarchy literature, or Aritzeta, Swales, and Senior's 2007 review of 43 empirical studies of Belbin's model) was preferred over a single study, and a historical review tracing a framework's reception over time (Bonebright, 2010, on Tuckman's model) was preferred over an isolated critique. This is a pragmatic selection rule appropriate to a teaching resource, not a full systematic review of each literature, and it is stated as such.

AI Insight Sourcing

The AI Insight discussions in each section draw on the organisational-behaviour and information-systems literature examining artificial intelligence in HR and management settings — principally Cappelli, Tambe, and Yakubovich (2019) on the practical and ethical limits of data science in HR decisions, and Kellogg, Valentine, and Christin (2020) on how algorithmic systems reshape organisational control. Neither source is a vendor publication, and no specific commercial tool is named or endorsed anywhere in this paper. Each AI Insight box discusses at least one concrete risk category — algorithmic bias, employee monitoring and surveillance, data protection, or erosion of trust — rather than treating AI adoption as risk-free by default.

Limits of This Selection Method

This selection method has its own limitations, which are worth stating rather than leaving implicit. Requiring a peer-reviewed empirical challenge as a condition of inclusion means frameworks with a genuinely strong evidence base but no notable published critique — where one exists — would receive comparatively thin critical treatment simply because there is less to say, not because they are beyond question; readers should not infer that the absence of an extended Critical Perspective box implies a

framework is uncontested in every respect, only that this paper did not locate a documented empirical challenge meeting the evidentiary bar described above. The two-part selection test is also applied by a single author rather than a review panel, which is itself a limitation the proposed tutor-review protocol below is partly designed to address, since a second or third reader may reasonably weigh the same evidence differently.

Design Note

Evaluation protocol (proposed, not yet executed). To move this resource's central claim — that pairing each framework with a sourced critique helps students evaluate rather than merely describe leadership and team-development theory — from description toward evidence, a two-part evaluation is proposed for the next revision cycle. First, two or three OTHM-experienced tutors would independently rate each Critical Perspective box against a short rubric covering accuracy, appropriate pitch for a Level 5 audience, and absence of overclaiming. Second, a brief pre/post reflective-writing exercise would ask students to evaluate one framework in three to four sentences before and after reading the relevant section, with the two samples compared for a shift from descriptive toward evaluative language. This protocol has been designed for this revision but has not yet been carried out; no results are reported in this edition, and none should be inferred. The author intends to complete a small tutor-review pass before any further resubmission and will report the outcome, whatever it shows, in a subsequent revision rather than in this one.

Section 1. Leadership and Management Theories

This section distinguishes leadership from management and critically compares the key theories used to explain each, addressing the first learning outcome (see Appendix A).

1.1 Differentiating Leadership and Management

Leadership centres on inspiring, motivating, and empowering people toward a shared vision, drawing on visionary thinking, emotional intelligence, and strategic decision-making. Management centres on planning, organising, delegating, and monitoring, coordinating day-to-day operations and resources to meet specific targets within a set timeframe. Zaleznik (1977) was among the first to argue the distinction is not merely stylistic: he characterised managers as problem-solvers who bring order and stability, and leaders as people willing to tolerate the disorder that comes with pursuing genuinely new direction. Kotter (1990) extended this into a practical distinction still widely taught: management copes with complexity by producing order and consistency, while leadership copes with change by setting direction, aligning people, and motivating them toward it. Leadership is fundamentally about people, growth, and long-term direction; management is fundamentally about process, tasks, and short-term goals. The two are complementary rather than competing, and effective operators typically blend both — a point Kotter himself makes explicitly, arguing that organisations are usually over-managed and under-led rather than the reverse.

1.2 Key Leadership Theories

Trait theory holds that certain innate characteristics — intelligence, charisma, decisiveness — make some individuals more likely to succeed as leaders. Stogdill's (1948) influential survey of the trait literature found no consistent set of traits reliably predicted leadership across situations, a finding that shifted subsequent research toward behavioural and situational explanations.

Behavioural theories treat leadership as a learnable set of actions rather than an innate quality. The now-standard distinction between autocratic (deciding without consulting others), democratic (seeking input before deciding), and laissez-faire (delegating decisions with minimal interference) styles originates in Lewin, Lippitt, and White's (1939) experimental study of boys' clubs led under each style, which found the democratic condition produced the most consistent balance of output and group satisfaction, while the autocratic condition produced higher output only when the leader was present and the laissez-faire condition produced the least work of the three. The appropriate style in a modern organisational context is generally understood to depend on the situation at hand, an idea developed further by contingency approaches such as Fiedler's (1967) model, which proposed that a leader's effectiveness depends on the match between their characteristic style and how favourable the situational control is.

Core Definition

Leadership is the practice of inspiring and guiding people toward a shared vision, while management is the practice of planning, organising, and controlling resources and tasks to achieve specific goals — distinct functions that effective operators learn to combine (Zaleznik, 1977; Kotter, 1990).

Critical Perspective

Trait theory's core claim — that leaders are born with identifiable, stable characteristics — has not held up well empirically. Stogdill's (1948) review found leadership traits interacted heavily with the situation, meaning the same trait profile could succeed in one context and fail in another; this is precisely why subsequent behavioural and situational theories displaced trait theory as the dominant explanation. Lewin, Lippitt, and White's (1939) classic experiment is itself frequently taught without qualification, but it was conducted with small groups of boys in a controlled after-school setting, and its direct generalisability to adult professional teams under real organisational constraints has been questioned on those grounds; the study is best read as establishing that leadership style measurably affects group behaviour, not as a precise prescription for which style suits every modern workplace. A residual risk in teaching trait theory uncritically is that it can imply leadership capacity is fixed rather than developed, which the evidence does not support.

AI Insight, Application, and Risk

AI-driven analytics and scheduling tools can strengthen the management side of the leadership-management distinction considerably — resource allocation, progress tracking, data-driven planning. Cappelli, Tambe, and Yakubovich (2019) note that HR-relevant data science is constrained by the complexity of human phenomena and typically small, noisy datasets, so such tools should be treated as decision support rather than decision-makers. Leadership's core work — inspiring people, building trust, reading a room, exercising emotional intelligence — remains a distinctly human capability that no tool substitutes for, and Kellogg, Valentine, and Christin (2020) note that algorithmic monitoring intended to support management can itself be experienced by staff as a control mechanism, with consequences for trust that a manager needs to actively manage.

1.3 Key Management Theories

Scientific management (Taylor, 1911) applies systematic, measured methods to improve efficiency by simplifying tasks and matching workers to roles. Classical management theory splits into Weber's (1947) bureaucratic model, built on rational hierarchy and standardised procedure, and Fayol's (1949) administrative principles, including unity of command and division of work. Behavioural management theory shifted attention to human and social factors following the Hawthorne studies (Mayo, 1933), which reported that simply improving how workers were treated raised productivity independent of physical working conditions. McGregor's (1960) Theory X and Theory Y later contrasted pessimistic and optimistic managerial assumptions about employee motivation, while modern systems and contingency theories treat the right management approach as dependent on organisational context rather than universal — Fiedler's (1967) model, introduced above in the leadership context, is one such contingency approach

applied to management effectiveness more broadly. Effective managers typically draw on more than one of these frameworks rather than following a single school exclusively.

Critical Perspective

The Hawthorne studies (Mayo, 1933) are still commonly taught as establishing that social attention alone raises productivity, but this interpretation has been substantially challenged. Bramel and Friend's (1981) detailed re-analysis argued that the original researchers downplayed evidence of worker resistance and selective sampling, and later statistical re-examinations of the original data have found little consistent evidence of a 'Hawthorne effect' once other explanatory variables are accounted for. The finding retains pedagogical value for illustrating that human relations factors matter, but should not be presented as a settled or methodologically clean result.

In practice, these schools of management thought are not mutually exclusive alternatives a manager must choose between once and apply universally. Scientific management's emphasis on measured, standardised process still underpins how routine, high-volume operational work is designed in many industries, from manufacturing lines to standardised service-desk procedures, precisely because that kind of work benefits from the consistency Taylor (1911) was aiming at. Behavioural and human-relations approaches tend to matter more where work is less routine and depends on discretionary effort, judgement, and collaboration that cannot be fully specified in advance — the kind of work Section 3 of this paper addresses directly. A manager who understands both schools, and the contingency logic connecting them, is better placed to judge which emphasis a given task or team actually needs than one trained in only one tradition.

Section 2. How Teams Are Developed

This section addresses what team development means, what distinguishes a high-performance team, and how the major team-development models compare, addressing the second learning outcome (see Appendix A).

2.1 What Is Meant by 'Team Development'

Team development is the ongoing process of building communication, collaboration, and trust among a group of individuals so they function effectively toward a shared objective, rather than a one-off event. Clear goals, open communication, defined roles, timely conflict resolution, and continuous learning are the components that consistently underpin successful team development (West, 2012).

2.2 What Is Meant by 'High-Performance Team'

A high-performance team is a group with clearly defined roles that consistently achieves superior results, often exceeding expectations relative to comparable teams. Katzenbach and Smith (1993), in one of the most widely cited studies of team effectiveness, distinguish a genuine team — bound by a common purpose, shared performance goals, and mutual accountability — from a working group that merely shares information and coordinates loosely; they argue the difference in output between the two is substantial and that most groups called 'teams' inside organisations are, on closer inspection, working groups. What distinguishes a high-performance team from a regular team is coordination rather than effort alone: shared and clearly understood goals, trusted leadership, genuinely open communication, and mutual respect between members (Burkus, 2023).

2.3 Comparing Team Development Models

Tuckman's (1965) model describes teams moving through four stages — forming, storming, norming, and performing — with a fifth stage, adjourning, added by Tuckman and Jensen (1977) to describe how a team disbands once its task is complete.

Belbin's (1981) original model identified eight team roles based on individual strengths, such as plant, shaper, and coordinator, helping teams leverage diverse skills; a ninth role, Specialist, was added in Belbin's (1993) revision and is frequently, but incorrectly, attributed to the 1981 edition.

The situational leadership model (Hersey & Blanchard, 1969) argues effective leadership adapts to a team's maturity level, ranging from directive to delegating.

The Drexler, Sibbet, and Forrester (1988) Team Performance Model maps team development across seven stages, from orientation through trust-building, goal clarification, and commitment to implementation, high performance, and renewal, offering a more detailed roadmap at the cost of added complexity for smaller teams.

Core Definition

Team development is the ongoing process of building the communication, trust, and shared direction that turn a group of individuals into a team capable of consistently performing above the level any one member could reach alone (Katzenbach & Smith, 1993).

Critical Perspective

Tuckman's (1965) model is the most widely taught team-development framework, but its neat, linear staging is also its most common criticism. Bonebright's (2010) historical review of the model's reception over more than 40 years notes that it was adopted rapidly by HRD practitioners well before it received sustained academic scrutiny, and that later researchers (cited within her review) identified two significant gaps: the model says little about how team development affects creative problem-solving, and it does not address either outright task failure or genuinely outstanding performance as distinct outcomes. Real teams also frequently revisit 'storming' after a membership change or a new project phase, rather than progressing through the stages once in strict sequence.

Belbin's (1981, 1993) role framework carries a parallel risk in practice. Aritzeta, Swailes, and Senior's (2007) review of 43 empirical studies found the model's central assessment instrument has acceptable convergent validity in some respects, but that results across the wider literature are inconsistent, and they attribute some of the inconsistency to methodological differences between studies rather than to a single clear verdict on the model's validity. Treating a team member's preferred role as fixed can limit how flexibly a team assigns work, when the underlying evidence suggests individuals can and do operate across multiple roles depending on context — a caution the model's mixed validity evidence reinforces rather than resolves.

Situational leadership (Hersey & Blanchard, 1969) is treated in this paper with the same caution. Thompson and Vecchio (2009), testing three published versions of the theory against survey data from 357 banking employees, found the more recent, revised statement of the theory performed worse as a predictor of subordinate performance and attitudes than the original 1972 version — an unusual result for a theory's own refinement, and one that led the authors to note that situational leadership remains among the least rigorously tested of the popular leadership theories relative to its enormous popularity in management training. The model's central construct, 'follower readiness,' also depends heavily on a leader's own subjective judgement of their followers' competence and commitment, which introduces the same risk of bias present in any single-rater assessment.

AI Insight, Application, and Risk

AI-powered collaboration analytics can surface patterns in communication frequency and workload distribution that hint at which development stage a team is in. Kellogg, Valentine, and Christin (2020) describe how such analytics function as one of several mechanisms of algorithmic organisational control, alongside recording, rating, and recommending — meaning a dashboard framed internally as neutral 'insight' can be experienced by team members as surveillance, with a measurable effect on how openly they communicate once they know they are being tracked. Interpreting what any pattern means for the people involved, and doing the relationship-building work that actually moves a team forward, still requires a human leader paying attention, alongside clear communication to the team about what is being measured and why.

Section 3. Improving Individual and Team Performance

This section addresses the techniques used to improve performance, why performance improvement matters to the individual and the business, and the role of motivation theory, addressing the third learning outcome (see Appendix A).

3.1 Techniques to Improve Individual and Team Performance

Setting clear, measurable goals gives team members a defined sense of purpose and direction. Locke and Latham's (2002) 35-year review of goal-setting research, drawing on hundreds of studies, concludes that specific, difficult goals reliably produce higher performance than vague or easy goals, provided the person has sufficient ability and commits to the goal — one of the most consistently replicated findings in organisational psychology. Ongoing, specific feedback and coaching help people identify what to improve and how; Kluger and DeNisi's (1996) meta-analysis of over 600 feedback studies found that feedback interventions improve performance on average, but that more than a third of the studies in their sample found feedback actually reduced performance, typically when feedback shifted a person's attention toward their sense of self rather than toward the task itself. This is a genuinely important caution: badly delivered feedback is not merely less helpful than well-delivered feedback, it can actively make performance worse.

This has a direct practical implication for how feedback should be phrased. Kluger and DeNisi (1996) found the more damaging pattern was feedback framed around the person — comments that implicitly or explicitly evaluate someone's ability or character — rather than feedback framed around the task and what specifically was done well or poorly. A manager telling a team member 'you're not a details person' is, on this evidence, more likely to reduce future performance than a manager saying 'the last three reports were missing the reconciliation step'; the second comment gives the person something concrete to act on, while the first invites defensiveness and self-protective disengagement from the task. This is a small but genuinely actionable distinction for a student moving into a first management role.

Promoting open communication and collaboration builds the trust that lets a team exceed its individual parts, consistent with Katzenbach and Smith's (1993) distinction between a genuine team and a loosely coordinated working group discussed in Section 2.2. Encouraging continuous learning keeps skills current, and recognising achievement sustains motivation over the long run — though, per the discussion of Herzberg, Mausner, and Snyderman (1959) in Section 3.4, recognition functions as a genuine motivator rather than merely preventing dissatisfaction, which is part of why it belongs in this list of active performance-improvement techniques rather than being treated as a baseline expectation.

3.2 The Importance to an Individual of Improving Own Performance

Improving personal performance supports career advancement through recognition and promotion, contributes to job satisfaction through a genuine sense of accomplishment, and builds the self-confidence

needed to take on more ambitious challenges. Locke and Latham (2002) report that goal attainment is consistently associated with higher self-reported satisfaction, particularly when the individual perceives the goal as self-set or agreed rather than imposed, which is one mechanism connecting performance improvement to individual wellbeing rather than treating the two as separate concerns. Improving personal performance also strengthens the team and organisation around that individual, and the habit of continuous learning it requires keeps someone adaptable as their field changes.

3.3 The Importance to a Business of Effective Individual and Team Performance

High-performing individuals and teams complete work more efficiently, feeding directly into organisational output and profitability. Huselid's (1995) large-scale study of over 3,000 US firms found that organisations investing in high-performance human resource practices — including structured performance management, feedback, and skill development of the kind discussed in this section — showed measurably lower employee turnover and higher productivity and corporate financial performance than comparable firms that did not, providing firm-level evidence that individual and team performance improvement is not merely a motivational nicety but is empirically linked to business outcomes. Better individual performance raises the overall quality of work, strengthening customer satisfaction, while effective teams collaborate and innovate in ways that keep a business competitive (Katzenbach & Smith, 1993). Recognising strong performance boosts morale and retention, and consistent excellence builds the reputation that earns customer trust and investor confidence.

3.4 The Role of Motivation Theories

Maslow's (1943) hierarchy of needs holds that people are motivated by a sequence of needs — physiological, safety, belonging, esteem, and self-actualisation — addressed roughly in order. Herzberg, Mausner, and Snyderman's (1959) two-factor theory separates hygiene factors, such as salary and job security, which prevent dissatisfaction when present but do not by themselves motivate, from genuine motivators like recognition and growth opportunities. Vroom's (1964) expectancy theory holds that people are motivated when they believe their effort will lead to a valued outcome, pointing managers toward clear goals, adequate support, and visible reward for effort. Applied together with the goal-setting and feedback evidence discussed in Section 3.1, these theories give managers a practical, evidence-informed toolkit for sustaining motivation rather than a set of abstract ideas.

Core Definition

A motivation theory is a psychological framework explaining what drives people's behaviour and effort, used by managers to design the goals, feedback, incentives, and working conditions that sustain high individual and team performance.

Critical Perspective

Maslow's (1943) hierarchy remains the most recognisable motivation theory, but its strict five-stage sequence has drawn sustained empirical challenge: Wahba and Bridwell's (1976) review of the research found little support for needs being satisfied in a fixed order, or for a need ceasing to motivate once 'satisfied,' as the original model implies. The theory retains value as a broad map of human needs, but should be taught as a heuristic rather than a rigidly sequential model.

Herzberg's hygiene-motivator distinction has faced a related methodological critique concerning how the original data were gathered. Herzberg, Mausner, and Snyderman (1959) relied primarily on the critical-incident technique, asking respondents to recall times they felt exceptionally good or bad about their job; this method is vulnerable to a self-serving attribution bias, since people tend to credit satisfying experiences to their own achievement and blame dissatisfying ones on external factors such as company policy or supervision, which could itself produce the hygiene-motivator split the theory reports, independent of whether the underlying psychological distinction is real. Some factors treated as pure hygiene, such as pay, can also function as a genuine motivator depending on context, further blurring the line the theory relies on.

Vroom's (1964) expectancy theory is intuitively appealing and consistent with the goal-setting evidence discussed in Section 3.1, but it depends on managers accurately knowing what outcomes a given employee actually values and how confident that employee is in their own ability to perform — both of which are difficult to observe directly and are usually inferred rather than measured, which limits how precisely the theory can be applied in practice even where its general logic is sound.

AI Insight, Application, and Risk

AI-powered performance dashboards can track KPIs continuously and flag early signs of disengagement far sooner than a quarterly review would. This is a genuine capability, but Cappelli, Tambe, and Yakubovich (2019) caution that algorithmic HR decisions raise accountability questions distinct from their accuracy: an employee flagged by a model as 'disengaged' may reasonably want to know what data produced that judgement and have a route to contest it, and organisations using such tools have a data-protection obligation to handle the underlying behavioural data responsibly. Genuine recognition, coaching, and the trust that actually sustains motivation still have to come from a person who knows the team member, not a notification.

Section 4. Determining Your Own Capacity to Be an Effective Leader and Manager

This section addresses the techniques used to assess your own capacity as a leader and manager, illustrated with a worked example extended into a full reflective cycle, addressing the fourth learning outcome (see Appendix A).

4.1 Techniques to Determine Own Capacity

A personal SWOT analysis applies the SWOT framework to the self: Strengths (key capabilities such as communication or decision-making), Weaknesses (areas that hold performance back, such as limited experience or difficulty delegating), Opportunities (training, mentoring, or new challenges that could develop capability further), and Threats (competing priorities, limited resources, or resistance to change that could undermine effectiveness). Working through all four honestly gives a structured starting point for understanding where you actually stand as a leader and manager, rather than relying on assumption.

4.2 Assessing Own Ability to Improve Knowledge and Skills

Structured assessments can add insight beyond self-reflection alone, though their value varies considerably by instrument. The Myers-Briggs Type Indicator (MBTI) is one of the most widely used personality instruments in corporate settings, administered to an estimated 1.5 million people annually (Pittenger, 2005), and is often presented as revealing personality preferences that shape leadership style. It should be used, if at all, with clear awareness of its limitations rather than as a primary basis for judging leadership capacity; the Critical Perspective box below sets out why. An emotional intelligence assessment shows how well someone manages their own emotions and relationships with others, and carries fewer of the specific psychometric objections raised against the MBTI, though it still depends on the quality of the particular instrument used. Reflective journals and statements build the habit of tracking experiences, challenges, and successes over time.

From self-assessment, improvement becomes concrete through setting SMART goals — specific, measurable, achievable, relevant, and time-bound — a discipline supported by the same goal-setting evidence discussed in Section 3.1 (Locke & Latham, 2002), actively seeking feedback from peers and mentors, investing in relevant training, and networking with other leaders to exchange practical experience.

Core Definition

A personal SWOT analysis is a structured self-assessment identifying an individual's Strengths, Weaknesses, Opportunities, and Threats as a leader and manager, providing an honest baseline from which targeted development can be planned.

Critical Perspective

A personal SWOT analysis, like its organisational counterpart, depends heavily on the honesty and self-awareness of the person completing it; without external input, it risks reflecting how someone wishes to see themselves rather than how they are actually perceived by colleagues. This is precisely why the assessments discussed above — particularly seeking feedback from peers and mentors — function as a necessary check on self-assessment rather than an optional addition to it.

The Myers-Briggs Type Indicator warrants more caution than the first edition of this paper gave it. Pittenger's (2005) widely cited evaluation identifies two central concerns: forced-choice scoring assigns people to one of two categories on each dimension even when their underlying preference is close to the midpoint, discarding real information about the strength of a preference, and test-retest studies have found a substantial proportion of people are classified into a different type when retested weeks or months later, which raises questions about how stable the underlying trait actually is. It is worth noting this critique is itself contested: later commentators have argued Pittenger's case rests heavily on older reliability data and is not as conclusive as it is sometimes presented. The reasonable teaching position is neither uncritical adoption nor outright dismissal: the MBTI can be a useful prompt for reflective conversation about working preferences, but should not be relied on as a validated measure of leadership capability or used as a primary input into decisions about someone's suitability for a leadership role.

AI Insight, Application, and Risk

AI-assisted 360-degree feedback tools can aggregate input from multiple colleagues and highlight recurring themes far faster than collecting and reading it all manually. This genuinely reduces the practical burden that has historically limited how often structured peer feedback is collected. It also introduces a specific risk worth naming directly: aggregation can obscure who said what, which protects candour but also removes context a person would otherwise use to judge how much weight to give a particular comment, and any system storing colleague feedback about a named individual raises data-protection and confidentiality obligations that a paper-based process handled less formally. Turning aggregated feedback into genuine behavioural change still depends entirely on the individual's own reflection and follow-through — no tool can do the growing for you.

Worked Example: Illustrative Personal SWOT Analysis and Reflective Development Cycle for a New Team Leader (Hypothetical Case)

The following example is explicitly hypothetical, constructed for teaching purposes, and does not describe a real individual or a documented case. It has been extended from the first edition's single SWOT table into a fuller reflective cycle, following reviewer feedback, to show how a self-assessment is meant to be used rather than presenting it as an end in itself.

Category	Illustrative Factors
Strengths	Clear written communication; calm under pressure; strong technical knowledge of the team's work

Weaknesses	Limited experience delegating; tends to avoid difficult conversations
Opportunities	A first-line management training course offered internally this quarter; a more experienced mentor available on request
Threats	Team is being asked to take on a second project with no additional headcount

From Self-Assessment to Simulated Peer Input

A self-completed SWOT is a starting point, not a conclusion, for the reasons set out in the Critical Perspective box above. In this hypothetical case, the leader is imagined to seek brief, informal input from two team members and their own line manager, following the model's own logic that external checking is a necessary rather than optional step. Illustrative simulated input consistent with the self-assessment above might include: a team member noting that the leader is easy to raise a technical problem with but rarely follows up afterward to say how it was resolved, and the line manager noting that the leader consistently under-delegates routine tasks even when workload is visibly high. Note that this input is, like the SWOT itself, an illustrative construction for teaching purposes and not data from a real reflective exercise; it is included to show how peer input is meant to sharpen a self-assessment, typically by turning a vague weakness ('tends to avoid difficult conversations') into something more specific and actionable ('under-delegates even under visible workload pressure').

From Assessment to SMART Development Goals

Following the goal-setting evidence discussed in Section 3.1, the SWOT and simulated peer input above translate into two SMART goals rather than a general intention to 'delegate more' or 'communicate better':

- Goal 1 (delegation): Delegate at least two recurring routine tasks to named team members by the end of the current month, and review after six weeks whether workload and task quality have been maintained.
- Goal 2 (follow-through communication): For every technical problem raised by a team member, send a brief follow-up message within 48 hours of resolution stating what was done, starting immediately and reviewed after one month.

Each goal is specific and time-bound, addresses a concern raised by more than one source (self-assessment and simulated peer input), and includes an explicit review point — the mechanism Locke and Latham (2002) identify as necessary for goal-setting to translate into sustained behaviour change rather than a one-off intention.

Reviewing Progress

Consistent with Kluger and DeNisi's (1996) caution that badly delivered feedback can reduce rather than improve performance, the review point for each goal in this hypothetical case would ask a task-focused question — did the delegated tasks get completed to standard, did the follow-up messages actually go

out — rather than a self-focused question about whether the leader 'felt' more confident, since task-focused feedback is the category their meta-analysis associates with the more reliable performance gains.

Discussion

Read together, the four sections make a consistent argument: the classic theories of leadership, team development, and motivation retain teaching value not because they are empirically unassailable, but because their documented limitations — Stogdill's (1948) challenge to trait theory, Bonebright's (2010) historical account of Tuckman's contested staging, Aritzeta, Swailes, and Senior's (2007) mixed verdict on Belbin, Thompson and Vecchio's (2009) finding that situational leadership's own revision underperformed the original, Wahba and Bridwell's (1976) evidence against Maslow's strict need ordering, and Pittenger's (2005) psychometric caution on the MBTI — give students a concrete route into critical evaluation rather than memorisation. A leader who understands why these frameworks are contested is better equipped to apply them flexibly than one who treats them as settled fact.

It is worth making explicit how the four sections apply the four aspects of criticality Mingers (2000) identifies, since the paper claims this as its organising lens rather than a decorative reference. Scepticism toward rhetoric is exercised throughout by refusing single, quotable claims about a framework's usefulness without the qualifying evidence attached to it — for example, presenting the MBTI's popularity in the same breath as its psychometric limitations, rather than in a separate, easily-skipped section. Scepticism toward tradition is exercised by treating a framework's age and familiarity, such as Tuckman's decades of classroom use, as a reason to check its evidentiary standing rather than a reason to trust it. Scepticism toward authority is exercised by noting, as in Section 2's discussion of situational leadership, that a theory's own authors revising their model does not guarantee the revision performs better empirically, and by treating practitioner and vendor claims about AI tools with the same caution rather than deferring to them because they come from an apparently expert source. Scepticism toward objectivity is exercised most directly in the Design and Method section's admission that framework and critique selection reflects a single author's judgement against a stated but imperfect test, not a neutral or exhaustive procedure.

This paper's main limitation is one it states directly, in line with reviewer feedback on the first edition. First, the worked SWOT example in Section 4 is a hypothetical illustration constructed for pedagogical clarity, including the simulated peer input used to extend it into a fuller reflective cycle; none of it is drawn from a documented case involving a real team. Second, the evaluation protocol described in the Design and Method section has been designed but not yet executed, so the paper's central pedagogical claim — that this pairing of framework and critique measurably improves students' evaluative rather than descriptive engagement — remains a reasoned hypothesis grounded in the wider critical-management-education literature (Mingers, 2000) rather than a demonstrated finding of this particular resource. A natural extension of this work would complete the tutor-review and student pre/post comparison described earlier, and, in a subsequent piece better suited to a full empirical or action-research submission, apply the frameworks discussed here to a real team over time, with data gathered through interviews or observation and a genuine reflective cycle documenting what changed.

Conclusion

This paper has presented a critically-informed teaching resource on leading and managing teams, addressing four learning outcomes and grounding its claims in the peer-reviewed origin of each major framework rather than presenting them as unattributed common knowledge or relying on commercial and practitioner web sources, as the first edition did in several sections. By comparing leadership and management theories critically, tracing team-development models to their original sources and documented limitations, extending a hypothetical self-assessment into a full reflective cycle with SMART goals, and applying sourced critique even to previously uncritiqued instruments such as the MBTI and situational leadership, the paper aims to leave students able to apply these frameworks with appropriate scepticism rather than treat them as fixed rules.

Consistent with the practice-oriented positioning set out in the Introduction, the paper's contribution is pedagogical rather than original empirical research, and its evaluation remains a proposed protocol rather than a completed study — a limitation stated directly rather than implied away. Future work, ideally reported first as the tutor-review and student-reflection comparison described in the Design and Method section, and subsequently submitted as a full research or action-research article, could extend this resource with a genuine case study conducted within a real team, including primary data collection and a documented reflective cycle.

Appendix A: Mapping to OTHM Level 5 'Leading and Managing Teams' Learning Outcomes

The following table makes explicit the correspondence between this paper's sections and the unit's four learning outcomes, moved here from the section headings themselves following reviewer feedback that the first edition's headings reproduced OTHM assessment-criteria wording too closely for a journal-style submission.

Paper Section	OTHM Learning Outcome (paraphrased)
Section 1. Leadership and Management Theories	Understand leadership and management theories and the distinction between the two roles.
Section 2. How Teams Are Developed	Understand how teams are developed and what distinguishes a high-performing team.
Section 3. Improving Individual and Team Performance	Understand techniques for improving individual and team performance and the role of motivation theory.
Section 4. Determining Your Own Capacity to Be an Effective Leader and Manager	Be able to determine own capability as a leader and manager and plan for development.

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