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# Squires: Key followers and the social facilitation of charismatic leadership

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## Abstract

Drawing on several theoretical traditions in the social sciences, we offer a theory of the social facilitation of charismatic leadership by introducing the concept of squires. Squires are key followers who serve four social facilitation functions: liberating and legitimizing, modeling, buffering, and interpreting and translating. Liberating and legitimizing builds on social conformity research. Modeling is based in the social learning and social influence literatures. Buffering, and interpreting and translating, draw on insights from the psychology of power and organizational theory. These functions help resolve two central charismatic leadership paradoxes: (a) the need to be *different* from followers, though followers prefer to be led by leaders who are like them, and (b) the need to be personally inspiring to followers while being socially *distant* from them. In specifying squires' functions, we also address three weaknesses in conceptions of followership and contribute to understandings of how charismatic leadership emerges, works, and endures.

## Keywords

charisma, groups/teams, leadership, power

From Gandhi's hope for an independent India to President Roosevelt's plan to lift America from the Depression, and from Rudy Giuliani's dreams to resurrect New York City to Richard Branson's desire to successfully outperform British Airways, charismatic leaders' unique,

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compelling and grand aspirations—which most agree characterize charisma (Bass, 1985; Beyer, 1999; Burns, 1978; Conger & Kanungo, 1998; M. Weber, 1947)—also represent a serious challenge for them. These audacious and novel visions often present obstacles to followers. How do you convince sane and cautious people to risk following someone who proposes the impossible, or at least the implausible?

The most common answer to this question is that the charismatic leader is endowed with a personal magnetism that compels followers to follow. Ever since Max Weber described charisma as “a certain quality of an individual personality by virtue of which he is set apart from ordinary men” (1947, p. 358), charisma has most commonly been understood as a characteristic of individuals, a divinely inspired gift, as the Greek and biblical roots of the word might suggest (e.g., Beyer, 1999). Some argue that the individual allure of charisma is enough to inspire followers en masse to follow (e.g., Willner, 1984), and dozens of articles have been written about the readiness of followers to follow charismatic leaders (e.g., Bromley & Shupe, 1979; Galanter, 1982; Howell & Shamir, 2005; Masden & Snow, 1983; Wierter, 1997). However, though inspiring behaviors and personal magnetism clearly encourage others to follow charismatics (Bass, 1985; Conger, 1989), they are not sufficient to explain the emergence and continuing effectiveness of most successful charismatic leaders.

More recent understandings of charisma identify the *relationship* between leaders and followers as the true arena from which charisma’s influence stems (following from Burns, 1978; see also Howell & Shamir, 2005). However, the role of followers in facilitating the emergence, effectiveness, and endurance of charismatic relationships remains undertheorized. This paper presents a model of the social facilitation of charismatic leadership, focusing on the followers who make charismatic leaders possible and how they do so. We argue that effective charismatic leadership requires

four social facilitation functions—(a) liberating and legitimizing, (b) modeling, (c) buffering, and (d) interpreting and translating—and that these functions are often performed by close and highly trusted followers, whom we call squires.

Our theoretical development of the squire as a special type of socially facilitating follower is a response to the legitimate criticism that leadership studies have underemphasized situational factors in leadership effectiveness (Evans, 1970; Fiedler, 1978; House, 1971; Kerr & Jermier, 1978; Meindl, 1993). We also respond to Yukl’s (1999) call to explore the moderators of charismatic leadership, and to Lowe and Gardner’s (2001) call to better understand how charismatic behaviors yield positive outcomes. Our paper also partly addresses Chan and Brief’s (2005) question, “When don’t followers follow?” We suggest that potential followers may choose not to follow leaders with charismatic qualities if the charismatic lacks a good squire who can provide the social facilitation functions on which the leader’s emergence and ultimate effectiveness may depend.

Since this paper is about a particular kind of followers and the roles they play, we first examine the role that scholars have proposed for followers in the leadership literature to date. Next, we introduce the role of the squire and explain how it informs charismatic leadership theory. This aspect of our argument addresses three central weaknesses we identify in current conceptions of followership. Third, we discuss two central paradoxes of charismatic leadership: (a) the need to be *different* from followers, though people generally prefer to be led by leaders who are like them (Hogg, 2004; Hogg, Hains, & Mason, 1998; D. van Knippenberg & Hogg, 2003), and (b) the need to be personally inspiring to followers while also being socially *distant* from them. Fourth, we outline four key functions squires fulfill that help them resolve the challenges of difference and distance, each of which was developed using extant organizational and social psychological theory and research. Fifth, we place our understanding of

squires and their roles within the broader context, discussing alternatives to squires that might also address these challenges. We conclude by considering some practical implications of our theory, along with directions for future research. We use historical and current examples of leaders and their squires from both political and organizational contexts as illustrations of these dynamics.

## The nature of charisma

A well-specified theory requires clarity about assumptions and constructs. Here we clarify our assumptions regarding charismatic leadership and charisma in general. The literature offers disputed definitions of charisma, ranging from understanding charisma as very rare (Beyer, 1999; Katz & Kahn, 1978; following the Weberian tradition), to understanding charisma as falling in the same general category as inspirational and transformational leadership (cf. Conger, 1999). While we acknowledge that transformational and charismatic leadership share many traits in common, we also sympathize with Beyer's (1999) concern that the shift to understanding charismatic leadership as a form of transformational leadership overly tames the construct. Without endorsing all aspects of Beyer's argument, we believe followers' perceptions of exceptionality and remarkable giftedness are central to charismatic relationships between followers and leaders (Beyer, 1999; Conger, 1999; M. Weber, 1947), and that these perceptions and their related attributions demand theorizing unique to the emergence and efficacy of charismatic leadership over any meaningful length of time.

## Accounts of followers in charismatic leadership

An ongoing criticism of the leadership literature—and the charismatic leadership literature in particular—is that it has focused primarily on leaders, without attending enough to the role of

followers in leadership processes (Beyer, 1999; Burns, 1978; Hollander, 1978, 1992). Recently, scholars have focused on the role of followers more directly, both in general (Hollander, 1992; Kark & van Dijk, 2007; Meindl, 1995), and in the charismatic leadership process (Galvin, Balkundi, & Waldman, 2010; Howell & Shamir, 2005; Klein & House, 1995; Wierter, 1997). There is now a growing consensus that leadership inheres in the relationship between leaders and followers, and is jointly produced by those on both sides of the equation (Graen & Uhl-Bien, 1995; Hollander, 1992; Howell & Shamir, 2005; Klein & House, 1995; Yukl & van Fleet, 1992). However, even with this recent interest, followers remain “an under-explored source of variance in understanding leadership processes” (Lord, Brown, & Freiberg, 1999, p. 167).

Historically, discussions of the role of followers in leadership processes have tended to exhibit at least one of three weaknesses: they treat followers as an undifferentiated mass, fail to explain how followers actively create the conditions for the emergence and effectiveness of their leaders, and/or fail to acknowledge that followers have relationships among themselves which play important roles in the leadership process.

## Undifferentiated followers

Previous research has tended to lump followers of a given leader into one undifferentiated mass, portraying situations with individual leaders and their generalized followers with little acknowledgement that some followers might be more critical or valuable to the leadership process than others, or that different followers play differentially important roles. This weakness is most evident in what we call the *individual characteristics* approach to charismatic leadership that has dominated the literature on charisma and focuses primarily on the personal characteristics and behaviors of charismatic leaders (Beyer, 1999; Conger & Kanungo, 1987; House, 1977; Willner, 1984). When scholars in this tradition discuss followers,

they implicitly treat them as an undifferentiated mass—a group of individuals to influence, energize, and inspire, waiting to be activated, as a group, by the spark of a leader’s charismatic personal qualities and behaviors (e.g., Klein & House, 1995). This approach fails to recognize that followers are *always* differentiated, not only by rank or hierarchical status, but also, more importantly, by individualized relationships and roles between leaders and their followers. We posit that the charismatic–squire relationship is a particular and unique leader–follower relationship, with implications for the effectiveness of both charismatic leaders and their followers.

### *Passive followers*

While a handful of theorists differentiate among followers, they often fall prey to characterizing followers as having a passive role in leadership processes and outcomes. For example, a major exception to viewing followers as an undifferentiated mass is leader–member exchange (LMX) theory, which distinguishes followers by the quality of the relationship they have with a particular leader (Graen, Cashman, Ginsberg, & Schiemann, 1977; Graen & Uhl-Bien, 1995). However, LMX theory focuses on understanding how these relationships affect the particular followers under consideration; it does not consider how the followers in these dyadic relationships actively contribute to leader emergence and outcomes. Thus, although followers actively build relationships with a leader in LMX theory, they are less active in shaping the larger leadership dynamic among followers generally and as a group (Howell & Shamir, 2005).

Charismatic leadership theories have also differentiated followers by the type of charismatic relationships they develop (Klein & House, 1995; Wierter, 1997), their preference for different types of charismatic leaders (Howell & Shamir, 2005), their susceptibility to charismatic leaders (Bromley & Shupe, 1979; Galanter, 1982; Masden & Snow, 1983), their

self-concept clarity (Howell & Shamir, 2005), their values (Shamir, House, & Arthur, 1993) or their self-regulatory foci (Kark & van Dijk, 2007). While this work highlights how followers are not always an undifferentiated mass, it still gives followers a relatively passive role in the leadership process. In one recent exception, Galvin et al. (2010) describe the role that can be played by “surrogates”—individuals whose supportive behavior can bolster charismatic attributions about leaders among geographically distant followers. This is an important step in providing followers with a more active role in leadership outcomes, but the active role that followers might play in creating the conditions for leadership effectiveness remains largely undiscussed and underspecified (see also Shamir, 2007).

### *Relationships among followers*

While a number of theorists have attended to the importance of the relationship between leaders and their followers (since Burns, 1978; but see also Hollander, 1978; Hollander & Offermann, 1990), most of this work has ignored the fact that followers have relationships with each other, as well as with leaders, and that these interfollower relationships may influence leadership processes in ways that current and historical approaches overlook. Meindl (1990, 1993, 1995) offers one exception to this neglect. His radical approach to leadership heavily discounted the role of leaders themselves in the leadership process. Since many followers of charismatic leaders never have direct interactions with the leader, Meindl reasoned that at least part of the charismatic process must occur between followers themselves, without any direct influence from the leader.

While this is a critical observation about the charismatic leadership process, Meindl’s theories about followers largely succumb to the second weakness of work on followers—treating them as passive agents in the leadership

process. In Meindl's theory, followers do not actively incite other followers to follow particular leaders, nor intentionally demonstrate or teach follower behavior appropriate to a particular leader. His theory speaks more to how unconscious psychological processes among lower level followers facilitate the "contagious" spread of charisma (1993). While acknowledging that unconscious processes are likely operating as well, we argue that followers can, and often do, have a more active role in creating the conditions under which charismatic leadership can emerge and flourish.

In building our social facilitation model, we will demonstrate how followers are importantly heterogeneous, take active roles in leadership emergence and effectiveness, and play a key part in charismatic leadership processes through interactions among themselves. We do this by introducing the concept of squires—close and trusted key followers of charismatic leaders—who fulfill four social facilitation functions that facilitate charismatic leadership's emergence, effectiveness, and endurance. In the next three sections, we define and describe the role of the squire, outline two central paradoxes of charismatic leadership that squires help to resolve, and flesh out the four social facilitation functions squires fulfill—liberating and legitimizing, modeling, buffering, and interpreting and translating—and how they support charismatic leaders' emergence and effectiveness.

## Squires

In the Middle Ages, a squire was the attendant and personal servant to a knight, often a shield bearer or armor bearer, next after the knight in feudal rank. Like the squires of old, modern-day squires are special servants to their leaders and actively create the conditions that make it possible for their knights to function as knights. In many respects, squires are "first among followers," and represent a key linking pin (Likert, 1961) between charismatic leaders and their other followers. In fact, each of the famous

charismatics we mention in the opening of this paper had at least one obvious squire, someone with a uniquely close and trusting relationship with the charismatic, who actively facilitated their success as leaders. In the political realm, Gandhi had Nehru, especially early on; Roosevelt had Harry Hopkins, and Rudy Giuliani had Peter Powers. In the corporate arena, Richard Branson had Nik Powell, and later, Trevor Abbott.

Though the term "squire" would almost always have referred to a male in the Middle Ages, there need be no such gender association in our modern era, any more than the term "leader" should be seen today as gendered, though it would have most often been used to refer to men in our distant history. One of the most successful squires in recent corporate history was Colleen Barrett, who we argue was squire to Southwest Airlines' Herb Kelleher (Gibson & Blackwell, 1999), and whose example we will use to illustrate several important points in this paper. Male or female, a special relationship between charismatic leaders and their squires is necessary in order for them to fulfill the social facilitation functions that are central to charismatic leadership's effectiveness and endurance.

The social closeness required to perform these functions means that squires are commonly one hierarchical level removed from the charismatic leaders (i.e., a member of the top management team such as the COO), but not necessarily so (e.g., a squire could be a particularly impressive executive assistant). Squires are not defined by the jobs they have, nor the level of organizational hierarchy they occupy, but rather by the social facilitation functions they perform and the exceptionality of the relationships they have with their charismatic leaders. For example, the squires we just mentioned held different titles and official roles—Harry Hopkins supervised three of the major public works programs under Roosevelt, Peter Powers was Giuliani's First Deputy Mayor, Nik Powell cofounded the Virgin Group with

Branson, Colleen Barrett went from being Corporate Secretary, to Executive Vice President of Customers, to President and COO, all while playing the squire to Herb Kelleher. While a squire does not represent either a necessary or sufficient condition for the emergence and effectiveness of charismatic leadership, the presence of squires may make charismatic leaders' emergence more likely and positively moderate their effectiveness.

Fulfilling the four social facilitation functions we specify helps to overcome two of the most fundamental challenges of charismatic leadership: the paradox of difference—the charismatic's need to be both different from and identified with by their followers—and the paradox of social distance—the charismatic's need to both sustain the social distance from followers necessary to maintain impressions of charismatic exceptionality while encouraging (perceptions of) personal relationships and connections with their followers. These two challenges of charismatic leadership have long been recognized (e.g., Etzioni, 1961; Katz & Kahn, 1978), but the processes by which charismatics resolve them have remained largely unexplored. We now consider these challenges.

## Meeting the challenges of difference and distance

### *Difference*

The first paradox of charismatic leadership is that people prefer to be led by those who are *prototypic* of their own group (Hogg, 2004; Hogg et al., 1998; D. van Knippenberg & Hogg, 2003) but are unlikely to make charismatic attributions about those who are, in fact, like them. Intergroup relations and stereotyping research has shown that prototypic (in-group) members are judged, on average, to be more trustworthy, more likeable, and even more attractive than out-group members. Followers rate leaders who are prototypic of their followers' in-group (“one of us”) to be more

effective than those who are less prototypic, or out-group members (“one of them”); Hogg, 2004; Hogg et al., 1998). For example, a former software engineer, turned software development firm CEO, is more likely to be evaluated positively by the employees than a CEO who came from investment banking. Hogg and his colleagues further point out that, during the stress of mergers and acquisitions, employees may have a strong preference for having a new leader who is “one of us” rather than “one of them” (Hogg, 2004; Hogg et al., 1998).

This preference for prototypicality is problematic for many potentially charismatic leaders. Charismatic leaders are, by definition, people of extraordinary gifts, “different” from the masses. Since Max Weber (1947) first articulated a formal theory of charisma, leadership scholars have characterized charismatic leaders as advocates of large, compelling visions that fall outside prevailing norms. Such agendas must overcome the gravitational inertia of social systems that show strong preferences for incremental change or no change at all (Meyer, Goes, & Brooks, 1993). Thus, the very strengths that make leaders potentially charismatic may make potentially charismatic leaders so counternormative—so different—that they hinder people from following.

Consider some prototypic charismatic leaders—they were often far from prototypic of their followers. When Gandhi first began his efforts in India, he had lived outside the country for most of his life, including acquiring a British postsecondary education that would have been beyond the reach of all but the smallest proportion of Indian society. Roosevelt assumed the American presidency never having had to worry about a job or his finances, suddenly leading a nation with a 30% unemployment rate. Long-time Canadian Prime Minister Pierre Eliot Trudeau was seen as a “philosopher king” and marginalized by some in Québec as not being a true Francophone (his mother was an Anglophone). A common theme in American presidential campaigns is for candidates to



stress how much like “common folk” they are, though even candidates from humble backgrounds have very little in common with the people they aim to represent by the time they become presidential candidates. However, the fact that they consider their inherent difference from the public to be something important to manage is an acknowledgement that their difference is a challenge they know they must meet (cf. D. van Knippenberg & Hogg, 2003).

We argue that the type of identification that is crucial for charismatic leadership is not only about identification with the leader *as a leader* (e.g., Shamir, 1995), but also about identification with *that leader’s vision*, and what the enactment of that vision would mean for followers. The *personal* identification may instead be with a “first follower,” someone who frees them to take the initial risk to decide to follow, and then to understand what appropriate follower behavior looks like. We believe the squire fills this role, and, in so doing, helps charismatics resolve this first paradox of charismatic leadership. As theories of social learning and social influence suggest, individuals will be more likely to personally identify with models who are likeable, well respected, competent, and similar to them (Bandura, 1977, 1986; Cialdini, 2009). While charismatic leaders may meet the first three of these criteria, they do not meet the fourth: hence the need for a squire as a similar other upon whom to model followership.

### Distance

The second paradox of charismatic leadership is that attributions of exceptionality are difficult to maintain up close, but charismatic relationships depend in part on a quality of “intimacy and interaction” (Meindl, 1990, p. 189) that requires at least the perception of closeness. Human beings, with all their frailties and flaws, have a hard time seeming divinely endowed or unerringly insightful to those who are proximally subject to their frailties and flaws. As the

Duke of Conde in the reign of Louis XIV noted, “No man is a hero to his valet” (cited in Shamir, 1995, p. 20). The idea that distance from followers is central to the success of charismatic leadership is long-standing (Etzioni, 1961; Katz & Kahn, 1978; Waldman & Yammarino, 1999). While charismatic leaders are often both hierarchically and/or geographically distant from the majority of their followers, the paradox of distance that we believe a squire is most helpful in resolving is that posed by followers’ necessary *social* distance from their charismatic leaders.

Both Etzioni (1961) and Katz and Kahn (1978), voicing similar sentiments, claimed that charisma *requires* social distance. For example, Katz and Kahn write:

Charisma requires some psychological distance between leader and follower. Immediate superiors exist in a work-a-day world of constant objective feedback and evaluation. They are very human and very fallible, and immediate subordinates cannot build an aura of magic about them. Day-to-day intimacy destroys illusion. But the leader in the top echelons of an organization is sufficiently distant from the membership to make a simplified and magical image possible. (Katz & Kahn, 1978, p. 546)

Maintaining social distance is thus important to the maintenance of charisma. However, charismatic leaders need also to overcome this distance, at least in the psychological relationship that they have with their followers. At the same time, if charismatic leaders were to become truly intimate with their followers, the followers run the risk of becoming valets, their perceptual bubbles burst by the knowledge born of proximity. Hence, charismatics must somehow provide followers with the perception that their relationship is intimate and interactive, without the risks associated with actually being so.

Some, most notably Shamir (1995), have disputed the importance of distance to charisma. Shamir distinguishes between close and distant charisma, and has gathered descriptions



**Table 1.** Squire functions and their underlying mechanisms.

| Charismatic challenge | Social facilitation function | Relevant mechanisms  |
|-----------------------|------------------------------|--|
| Difference            | Liberating and legitimizing  | <ul style="list-style-type: none"> <li>• Freeing others to act on the impulse to follow</li> <li>• Facilitating social identification with the leader (lending in-group status of the squire)</li> </ul>                             |
|                       | Modeling                     | <ul style="list-style-type: none"> <li>• Modeling norms of followership through consistent and observable actions</li> </ul>   |
| Distance              | Buffering                    | <ul style="list-style-type: none"> <li>• Buffering followers from the potentially capricious tendencies of the leader</li> <li>• Buffering the leader from follower negativity, doubts, and the minutia of daily concerns</li> </ul> |
|                       | Interpreting and translating | <ul style="list-style-type: none"> <li>• Gathering and filtering feedback from the followers to the leader</li> <li>• Providing an intermediary/messenger role from the leader to the followers</li> </ul>                           |

of both types of charismatic leaders from over 300 individuals. However, Shamir's work demonstrates that the attributions that most people associate with charismatics, like heroic exceptionalism, rhetorical skill, courage and commitment to vision, are more likely to arise, and to a greater degree, in the context of social distance. The fact that there are also advantages to leadership "up close"—notably modeling, identification, and self-efficacy—helps to establish the value of squires, as we will describe. In fact, Shamir's results lead us to argue that a great charismatic-squire partnership captures the best of both distant and close leadership.

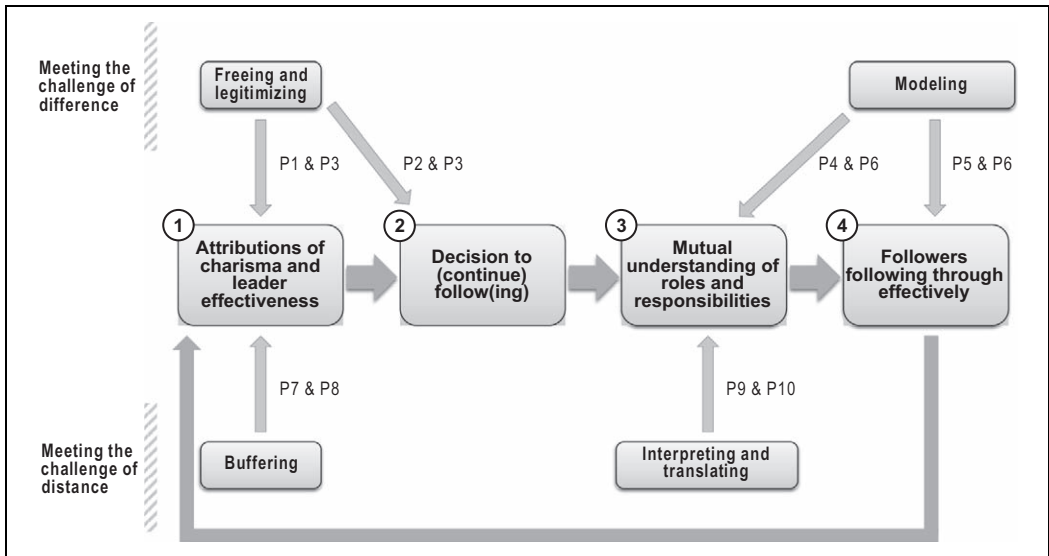
Thus, social distance between leader and followers is necessary to create the space to be visionary and sustain the attributions of charisma that fuel commitment and action, but that same social distance must be bridged to develop a salable vision lest the leader become unmoored and out-of-touch and followers less entranced. The importance of social distance to charismatic attributions, and the role of the squire in sustaining that distance, has an interesting implication. It suggests that relationships between charismatic leaders and their squires are unlikely to be, themselves, charismatic. Such relationships might have features that are

often associated with transformational leadership (e.g., positive relationships, increased self-esteem), but they are unlikely to be characterized by charismatic features like idealizing the leaders, trusting them blindly, or perceiving them to be unwaveringly courageous about their visions.

### The four social facilitation functions of a squire

Table 1 provides an overview of the four key functions of a squire, the charismatic leadership challenges they help to meet, and the mechanisms by which they do so.

Squires' first two social facilitation functions—liberating and legitimizing, and modeling—help resolve the paradox of difference. Potential followers may feel threatened by the prospect of following a charismatic leader who espouses a vision that threatens the status quo. Followers might look to a squire for social support and as evidence that the visionary leader is worthy of following (liberating and legitimizing), and to demonstrate effective and acceptable follower behavior (modeling). Since they speak to asserting the vision of the charismatic leader as one worthy of identification,



**Figure 1.** The process of socially facilitating charismatic leadership.

these functions are especially evident in a charismatic leader's emergence.

The second set of squires' social facilitation functions—buffering, and interpreting and translating—help charismatic leaders meet the paradox of social distance. Charismatic leaders inspire attributions of extreme exceptionalism, and need to maintain that aura of exceptionalism in order to be perceived as charismatic. However, followers also remain more engaged if they feel they are understood by the charismatic, and if they feel effective following through on the charismatic's leadership. These third and fourth functions allow squires to ease some of the potentially distracting burdens of leadership, distancing charismatics from the masses so that they can remain focused on their core enterprise (visioning, strategizing, and inspiring), but keeping followers enough in the loop so that they and the charismatic mutually understand each other's expectations and needs.

Figure 1 depicts a model of how the emergence and endurance of charismatic leadership is facilitated by the four functions we now describe in greater detail. The numbered boxes represent

the process of charismatic leadership (when it happens) and the squire functions appearing both above and below these boxes impact how that process unfolds. Charismatic leadership begins when followers perceive charismatic giftedness in leaders and make positive attributions about their leadership abilities (Box 1), which leads to followers' decisions to follow (or continue following; Box 2), representing charismatic leaders' emergence. In order for followers to be effective, mutual understanding between leaders and followers (Box 3) is required between the decision to follow and positive outcomes, including effective following (Box 4), which feeds back into the effective performance and charismatic attributions about the leader (Box 1), representing charismatic leaders' effectiveness and endurance. At the top of the figure are processes that help resolve the paradox of difference, and at the bottom of the figure are the processes that help resolve the charismatic dilemma of leaders' need for social distance from their followers.

The logic at the heart of our model of the charismatic leadership process mirrors the logic

of Ajzen and Fishbein's theories of reasoned action and planned behavior (2005). In Ajzen and Fishbein's models, perceived norms (definitions of the situation) drive behavioral intentions, which drive behavior (p. 194). In our model, squires help facilitate attributions of charisma that define the situation for potential followers, which leads to behavioral intentions to follow, and ultimately to effective follower behavior. We add the importance of mutually understanding roles and responsibilities in keeping with the large literatures on social influence and social learning that suggest that confidence about how to behave "appropriately" (especially under conditions of uncertainty, like those that spawn charismatic leadership) increases the likelihood that people will do so (Bandura, 1977; Cialdini, 2009).

Before considering the social facilitation functions and role of squires further, we must distinguish *squires* and the social facilitation functions they perform from recent thinking about *surrogates* and their role in impression management for charismatics (Galvin, Balkundi, & Waldman, 2010). With a primary focus on charismatic *attributions*, Galvin and his colleagues introduced the term *surrogate* "to describe a role that individuals fill by actively engaging in non-coercive impression management behavior that facilitates a positive image of a leader" (p. 480). The surrogate's role is to promote and defend the leader and model followership for others, with the ultimate outcome of surrogate behaviors being perceptions of leader charisma among more geographically distant subordinates.

Though we are clearly interested in follower behaviors that support charismatic leaders, our central concerns are less about how charismatic attributions spread through a social network of followers, and more about the requirement of a special, socially close follower whose unique role supports the charismatic leadership process, from emergence to endurance. The endpoint of Galvin's model is charismatic attributions by distal followers; it privileges the collapsing of

geographic distance as centrally important to the work of surrogates, where we focus on the psychological and *social* distance of central concern to Weberian charismatic relationships. We see charismatic attributions as an important early phase in an ongoing charismatic leadership process that requires continuous social facilitation for charismatic leadership to work. Beyond the perception and attribution of charisma, for the charismatic to excel at the tasks of charismatic and visionary leadership and for followers to remain energized while following through effectively, surrogates' activities are important but insufficient.

Though the notion of surrogates helps us understand some important and previously undertheorized social dynamics that relate to charismatic leadership, we contend that making truly charismatic leadership work often requires a broader, richer, and more uniquely skilled role than just a "stand in" or a "surrogate"; it takes a squire. Squires will often be good surrogates, but being a good surrogate is inadequate to being a good squire. This will become clearer as we examine each of the squire's key functions.

### *Resolving the paradox of difference*

The grand dreams, bold assertions, and occasional odd behaviors of charismatics can make it threatening to follow them. Squires help liberate other potential followers to follow charismatics, provide legitimacy to new charismatic leaders, and model appropriate or preferred follower behavior. These functions help charismatics resolve the paradox of difference: the need to be judged to be both unique and exceptional, yet, at least to some degree, also as "one of us." A squire can perform two functions that address the paradox of difference: liberating and legitimizing, and modeling. We ground liberating and legitimizing in the psychological literature on conformity (Asch, 1955) and in research on the role that lone risk-takers can play in shaping group outcomes (Elster, 1985; J. M. Weber & Murnighan,

2008). We ground the modeling function in the rich context of work on social learning theory (Bandura, 1977, 1986) and theories of social influence (Cialdini, 2009; Cialdini & Goldstein, 2004; Cialdini & Trost, 1998).

*Liberating and legitimizing.* The first important function that squires perform is to free followers to follow charismatic leaders. We posit that squires liberate followers to act on their initial impulses to follow potentially charismatic leaders by ensuring that they do not have to take the first risk in deciding to follow someone with an audacious vision. Once potential followers have been liberated to act on the impulse to follow the charismatic leader, the next thing they are likely to do is to seek confirmation that their decision is the right one, and that this leader is the “real thing.” On a continuing basis, squires can lend the “different” charismatic some in-group credentials, legitimizing the charismatic leaders in the minds of followers. Indeed, the credibility of squires likely arises as a joint product of their greater similarity to the followers (probable in-group status) and the closeness of their relationships with their charismatics.

The first type of social facilitation, “liberating,” helps other followers to more easily make the decision to follow charismatic leaders. Radical charismatic ideas such as Gandhi positing nonviolent resistance as the route to an independent India, or Richard Branson’s idea to start an airline as a direct competitor to the behemoth British Airways, can be difficult to swallow, especially from outsiders or those who are obviously different in significant ways from the followers they hope to lead. However, as research in social psychology on the reduction of social conformity pressure suggests, someone else going first can be all that is needed to start a snowball or contagion effect for others to join in. Squires assist potential followers to decide to follow charismatic leaders by providing the psychological space that makes it easier to choose to follow.

Asch’s (1955) classic studies of social conformity nicely illustrate people’s hesitance to act alone in social settings. People do not want to be perceived as foolish (Kelley & Stahelski, 1970), and they generally fear social isolation and ridicule (Asch, 1955). In Asch’s experiments, participants were asked to assess which of a series of lines was the same length as a “standard line.” Though it was clear which of the lines was the same as the standard line, on 12 of 18 trials, the rest of the people in the room (all confederates in the experiment) first unanimously agreed on a wrong answer. In the face of this social consensus, only 25% of the “real” participants offered the obviously correct answer on all 12 of the trials. Participants who conformed explained their choices in terms of not wanting to look foolish or be disruptive, and, strikingly, actually doubting the validity of their perceptions in the face of social consensus. The parallel here is quite clear: when an emerging charismatic starts propounding radical ideas, there is powerful conformity pressure to remain silent and unmoved along with the masses. Nonresponse to a potential charismatic is the safe choice, and if all potential followers make the safe choice, there will be no charismatic leadership.

However—and this is the crucial part of Asch’s research for our purposes—there was a simple and powerful way to eliminate the conformity effect. The presence of a single person who gave the *correct* answer reduced conformity effects by more than 86%. As long as someone is willing to take the first risk, other expressions of dissent (or agreement with a potentially emerging minority) can be liberated. Elster (1985) has similarly noted that people will often avoid risk-taking until they see someone else take a risk, but that once that has happened, a snowball of social risk-taking can result. Supporting this idea, J. M. Weber and Murnighan (2008) have offered empirical evidence of the causal impact a lone risk-taker can have on the norms that groups develop.

The risks of “first followership” are inherent in all human social contexts, including day-

to-day organizational life. There are risks to speaking up first about any organizational issue (Kish-Gephart, Detert, Treviño, & Edmondson, 2009), to being seen to be aligned with a losing coalition (Thibaut & Kelley, 1959), or to endorse a new direction that deviates from the safe terrain of “how things have always been done” (Dobrev & Gotsopoulos, 2010). Once a respected in-group member has already taken the risk, other followers’ social risks are mitigated. Religious evangelists have long recognized this reality and planted their own confederates in audiences to respond quickly to altar calls; once a few are on their feet testifying their faith, others who are feeling inclined but fearful of being alone more quickly join in (Wimberley, Hood, Lipsey, Clelland, & Hay, 1975). Similarly, when charities or entrepreneurs start raising funds, they often rely on credible lead donors or funders who have already bought into the vision and made a substantial contribution or investment, because this first act is effective in persuading others to follow (Starke, 2008).

People who are drawn to charismatic leaders’ visions but fear being a lone fool should be relieved that someone else “like them” has already voluntarily and publicly taken the plunge. Meindl confirms the importance of fellow followers in encouraging early charismatic attributions by other followers:

the experience and attribution of charismatic leadership may have less to do with what is happening up at the podium or pulpit, and more to do with what is being witnessed off-stage, in the audience, among individuals who are each others’ witnesses. (1990, p. 197)

These examples together point to how incremental changes at the individual level can result in group-level outcomes. This characterization was recently bolstered by the demonstration that attributions of charismatic leadership among followers adhere to social network principles and are shaped by the pattern of social relationships within a particular context (Pastor, Meindl, & Mayo, 2002).

Once freed to make the decision to follow a potentially charismatic leader, squires continue to legitimize charismatic leaders to their followers because, as followers themselves, they are able to bridge the gap between “different” leaders and those they hope to lead. Legitimizing is different from liberating in this important way: while a squire’s decision to follow a charismatic opens up the possibility for other followers to join them (“liberating”), the squire’s presence as a close follower, with whom other followers are likely to identify, offers credibility and legitimacy to the charismatic (Bandura, 1977; Cialdini, 2009; Cialdini & Goldstein, 2004; Cialdini & Trost, 1998).

If a credible squire who is more prototypic of the majority of followers than the charismatic voluntarily allies herself with a charismatic leader, this act lends the leader *de facto* follower in-group credibility. Whereas leaders often derive the latitude to act in nonconforming ways from their tenure in the in-group (B. van Knippenberg & van Knippenberg, 2005), emergent charismatics may need the *entrée* offered by squires for such latitude. Our assertion here is conceptually similar to the finding that minority group members on boards (outsiders) are more influential when they have social ties to other “insider” directors (Westphal & Milton, 2000).

Pierre Eliot Trudeau, one of Canada’s most charismatic prime ministers, offers an interesting example of this kind of effect. In 1980, Trudeau’s commitment to Canadian federalism was facing its ultimate test in the first Québec referendum on the province’s sovereignty. The man who played an understated but key role in Trudeau’s victory in that referendum was Jean Chrétien, then Justice Minister, who spent months campaigning in favor of Canadian federalism in some serious strongholds of Québec separatism. Unlike Trudeau, Chrétien was neither born wealthy nor schooled at elite institutions. He was not the man of grand vision that Trudeau was, but he was undeniably more like the majority of Francophone citizens of

Québec—those who were providing the main threat to Canadian federalism. Jean Chrétien's passion for Trudeau's vision helped legitimize Trudeau's agenda and message for some of the rural, working-class Québécois who were critical to his ultimate victory (Clarkson & McCall, 1990, pp. 214–244). Chrétien lent Trudeau credibility as a member of this in-group, and Chrétien's willingness to follow Trudeau passionately facilitated the decisions of many who might otherwise have been too suspicious of Trudeau to do so, to vote in favor of federalism.

This line of argument suggests that potential followers are both more likely to make charismatic attributions about a potential leader, and more likely to make decisions to follow (and continue to follow) such leaders, when someone else—a squire with credibility in the eyes of potential followers—has done so first (Propositions 1 and 2). Further, we argue that the strength of these effects will be greater when the squire is an in-group member of the potential followers (Proposition 3).

**Proposition 1:** The likelihood that a person will make charismatic attributions about a leader will increase in the presence of another credible person who has already made charismatic attributions about that leader first.

**Proposition 2:** The likelihood that a person will decide to follow a person exhibiting charismatic behaviors will increase in the presence of another who has already made the decision to follow that leader.

**Proposition 3:** The effects hypothesized in Propositions 1 and 2 will be stronger when prospective followers of a potential charismatic leader socially identify with the first follower/squire.

**Modeling.** Assuming that a charismatic leader succeeds in fanning an initial flame of interest among followers, squires can help sustain enthusiasm and effort among followers by

helping them understand how they should act. Squires are followers themselves, and thus similar to prospective followers in this critical way. That similar models provide an important and compelling source of influence over other's decisions and behavior is one of the foundational claims of both social learning theory (Bandura, 1977, 1986) and theories of social influence (Cialdini, 2009; Cialdini & Goldstein, 2004; Cialdini & Trost, 1998).

People are eager to behave in socially appropriate ways, and both consciously and unconsciously attend to myriad environmental and social cues in search of guidance (Bettenhausen & Murnighan, 1985; Cialdini, 2009; March, 1994; J. M. Weber, Kopelman, & Messick, 2004). A “logic of appropriateness” framework for understanding social decision making (March, 1994; J. M. Weber et al., 2004) would suggest that a follower who has experienced the necessary social freedom to follow and who attributes legitimacy to a charismatic leader will next look for appropriate ways to act in the role of follower. The modeling behavior of a squire can provide clear social norms that offer efficient control in organizations and social movements alike.

Behavioral modeling has long been a part of theorizing about leadership processes (Bass, Waldman, & Bebb, 1987; Yammarino, 1994). However, this work has generally focused on how leaders model behavior to their subordinates. It is thus an incomplete approach since many important behaviors are restricted to followers and would not be modeled by a charismatic leader. A squire who is visible and able to model clear, simple followership behaviors can clarify and reinforce social expectations of followers in general, and perhaps even have similar contagion effects on follower behavior, as has been found in the work on leadership behavior modeling (Bass et al., 1987), or in demonstrations that LMX quality between a leader and follower is positively related to the quality of relationships followers have with each other (Sherony & Green, 2002). Further, the influence of squires' modeling is likely



augmented by how similar they are to the other followers. When an individual feels similar to another, that other has more influence over their behavior (Goldstein & Cialdini, 2007; Goldstein, Cialdini, & Griskevicius, 2008).

Modeling followership may be particularly important in the context of charismatic leadership. Charismatic leadership often emerges under conditions of uncertainty (Beyer, 1999), and uncertainty is usually attached to the grand visions of charismatic leaders (consider what Gandhi was asking of his fellow citizens by imploring that they create change through nonviolent resistance, or what Herb Kelleher was asking of airline employees to differentiate his airline from competitors by doing *almost everything* differently). Social norms are particularly important determinants of behavior in uncertain contexts and people are more likely to follow the lead of successful others “like them” in times of uncertainty (Cialdini, Bator, & Guadagno, 1999; Cialdini & Trost, 1998). Thus, the clear behavioral norms of followership that squires can credibly establish may mitigate the aversive experience typically associated with uncertainty (Hastie & Dawes, 2001).

One might ask why an articulate leader, endowed with charisma, would not simply be able to tell followers what is expected of them. Yet modeling research documents that individuals master new skills and achieve comfort with them more quickly when they have models who are similar to themselves (Bandura, 1977). In other words, to learn how to be a good follower of a charismatic, you are better off observing a skilled follower than the charismatic himself. Verbal direction from a leader is important and necessary, but the leader is not a follower, and so having another follower demonstrate appropriate follower behaviors should be a more powerful influence on behavior than even the most charismatic entreaties alone. This suggests that strong social identification between squires and other followers strengthens the effects of facilitators’ behavioral modeling.

One of the most successful charismatic-squire relationships in the recent past was the relationship between Herb Kelleher and Colleen Barrett. Kelleher was the classic charismatic leader of Southwest Airlines who dreamed of a transformed, fun corporate culture and who preached sermons to move the masses within and outside the company (Gibson & Blackwell, 1999). Colleen Barrett wrote the staff’s birthday cards and held the Saturday barbecues in her back yard. She made manifest for employees what Kelleher waxed on about so effectively (Donlon, 1999). Posted on YouTube is a video tribute to the Kelleher-Barrett team prepared by employees of Southwest Airlines. The footage of Kelleher focuses on dynamic and inspired fun public presentations, whereas the footage of Barrett features her interacting directly with employees, modeling the spirit of Kelleher’s public presentations “on the ground.”<sup>1</sup> Interviewed as part of a Wharton series on leadership, Barrett paid tribute to Kelleher’s charisma, and contrasted her own role with his in a fashion consistent with our argument here:

Herb was the visionary, the creative thinker . . . I really like to solve problems. . . . I’ve spent most of my time on the people side. . . . I spend . . . 85% of my time on the employees and delivering proactive customer service to our employees.

The benefits of behavioral modeling by squires, then, include helping other followers learn how to behave appropriately as followers, reducing the aversive experience of uncertainty for other followers by modeling appropriate behavior, and establishing clear social norms that provide a clear path for followers to follow.

**Proposition 4:** Followers’ understanding of their expected roles and behaviors will increase in the presence of squires who model desired follower behaviors.

**Proposition 5:** The likelihood that followers will behave in the fashion desired by a



charismatic leader will increase in the presence of squires who model desired follower behaviors.

**Proposition 6:** The effects hypothesized in Propositions 5 and 6 will be stronger when the followers of the charismatic leader socially identify with the squire.

In short, good squires increase the likelihood that other (and potential) followers will make charismatic attributions about a potentially charismatic leader, increase the likelihood that potential followers will take the social risk of following, increase the likelihood that they will deem the leader to be legitimate, and help followers understand how to follow effectively.

### *Resolving the paradox of social distance*

We now examine two ways that squires help resolve the paradox of social distance—the need to be set apart from followers while sustaining followers’ affection and inspiration. Specifically, we describe two key functions—buffering, and interpreting and translating—that help to maintain the social distance between charismatic leaders and their followers while managing the interactions across that social distance. Squires also allow charismatic leaders to focus on providing vision and inspiration, their core strength. We ground our thinking about these functions in classic organization theory about separating functions in organizational systems (Etzioni, 1961; Katz & Kahn, 1978; Thompson, 1967) as well as the extensive recent work on the psychology of power (Keltner, Gruenfeld, & Anderson, 2003; Magee & Galinsky, 2008; Magee, Gruenfeld, Keltner, & Galinsky, 2005) and its manifestation in the potential for charismatic excess (e.g., Maccoby, 2000).

**Buffering.** In a seminal work of organization theory, Thompson (1967) argued that the purpose of management is to buffer the technical core (i.e., the people and divisions who actually

do the work of the company) from the vagaries and uncertainties of the external environment. His more fundamental insight was that in order to reduce uncertainty and ensure efficient functioning, organizations arrange themselves in ways that smooth out potentially volatile interactions. Our thinking about squires and charismatic leaders echoes this insight. In their own ways, charismatic leaders and their followers represent “core technologies” that are essential to their common organizational enterprise. The charismatic leader drives visionary thinking, and is the engine that sustains the emotional engagement of followers in challenging times. The followers actually make things happen. Each is vulnerable to disruptions from the other. The squire can manage how the two parties interact, buffering them from each other when necessary.

**Buffering followers.** As powerful people, charismatic leaders can be capricious, narcissistic (Lindholm, 1990; Maccoby, 2000; Sankowsky, 1995), and socially inappropriate at times (Anderson & Berdahl, 2002; Keltner et al., 2003; Maccoby, 2000). Keltner et al. (2003) argued that the preponderance of evidence suggests that powerful people have heightened approach mechanisms and muted inhibition tendencies. They can foreseeably storm into a situation they know little about (approach), make rapid and ill-conceived pronouncements to people who know their jobs well (disinhibition), convinced, regardless of evidence to the contrary, that they are right to do so (narcissism). Such behavior, however transitory, unbuffered by a proficient and well-respected squire, might seriously undermine the leader’s future credibility, thereby also undermining his or her otherwise transformative potential.

Since charismatic leaders derive some of their influence from the willingness of followers to idealize them (Bass, 1985; Conger & Kanungo, 1998), such leaders’ credibility might be especially prone to damage resulting from inappropriate behavior. In buffering followers from

the capricious tendencies of charismatic leaders or shielding followers from witnessing a leader's weaknesses, a good squire can benefit both the followers, by protecting them from uncertainty and helping maintain the charismatic attribution process, and their leaders, by supporting the impression management efforts upon which they depend for their influence and transformative effectiveness (Gardner & Avolio, 1998).

This function plays out, in part, in what Gardner and Avolio call the "stage management" tasks associated with supporting the "performance" of a charismatic leader (Gardner & Avolio, 1998; Westley & Mintzberg, 1989). Charismatic leaders need to appear "supernatural, superhuman" (M. Weber, 1947, p. 358) in their powers, and these necessary positive attributions can be facilitated through a squire's careful management of their leader's image. For example, Don Regan, President Ronald Reagan's long-time squire, wrote about the importance of crafting and maintaining a positive and powerful image of Reagan as president (Regan, 1988). By carefully controlling and supporting these performances, squires help bolster the image of the charismatic leader, sustaining the social distance required for charismatic attributions (Etzioni, 1961; Katz & Kahn, 1978), and providing additional legitimacy to his position and vision as a charismatic leader in the minds of other followers.

**Proposition 7:** The likelihood that followers will make charismatic attributions about a leader will increase in the presence of a squire who is actively managing the social distance between the leader and their followers.

*Buffering the leader.* Charismatic leaders are distinguished by their single-mindedness of purpose and commitment to their visions. Although they likely have a natural set of defenses against distraction, as noted before, it is also possible for them to be dragged down by dissent or general skepticism in the ranks. It can,

therefore, be worthwhile to shield charismatic leaders from followers' negativity, small problems, and shows of dissent. Beyer similarly notes that maintaining the charismatic's status requires distance from mundane concerns:

involvement with the mundane is antithetical to preserving an aura of extraordinary powers and exceptionalness. Most top executives in business may be drawn to or unable to avoid the details of managing. Also, in the process of performing their more rational, bureaucratic duties they may have to make decisions that displease followers or seem inconsistent with their vision and the exceptional qualities that have been attributed to them. (1999, p. 323)

A good squire can serve this function, acting as a trusted filter, passing on only those problems that are critical and truly demand the leader's personal attention.

During Giuliani's tenure as mayor of New York, his office was physically arranged so that only a select few, including Peter Powers, had direct access to him. Getting through this filter was a challenge that frustrated many senior level administrators (Kirtzman, 2000). This is an example of the tremendous discretion and authority that is often delegated to squires by their charismatic leaders. Though frustrating to outsiders, this arrangement effectively protected Giuliani's core technology of creating and driving an ambitious vision from being dragged into daily concerns and weighed down by operational challenges. Using a squire to protect the leader's space for focusing on vision and strategy respects the classic distinction in the leadership literature between tasks of leadership and tasks of management (Zaleznik, 1977). For example, Apple CEO Tim Cook is known as a "supply chain maven," who offered a steadying presence to the organization and was able to ensure that CEO Steve Jobs could focus on bringing his vision to life and the products of his imagination to market (Gupta, 2011).

Charismatic leaders may also need to be buffered from their own worst tendencies.

Takeo Fujisawa, the squire to Soichiro Honda, founder and CEO of Honda Motor Corporation, illustrates this particular kind of buffering. Honda was, by all accounts, a creative genius. Each day he arrived at the office with a list of new ideas. Unfettered, Honda might have started a hundred balls rolling every year, many of which would have been ill fated. However, each morning Honda sat down to tea with Fujisawa, who helped him analyze and assess each new idea. Most were consequently discarded despite Honda's initial enthusiasm. The result was Honda's continued reputation for brilliance (which might have been tarnished by multiple failures), and better organizational performance for the company (Sanders, 1975).

A squire who buffers well may help to sustain the mythos necessary to sustain perceptions of charisma, and allow leaders to spend their energy more effectively on the behaviors associated with charismatic leadership (such as visioning and inspiring). In a way, this buffering function helps explain Fiedler's counter-intuitive finding that socially distant leaders wielded more influence when the supportive functions of those leaders were handled by others (1958).

**Proposition 8:** The likelihood that a charismatic leader will be effective will increase if there is a squire actively managing the social distance between the leader and their followers.

Charismatic leaders, particularly in large organizations, have many individuals fulfilling different buffering functions—public relations experts help manage their impression management strategies, executive assistants keep their schedule on track—however, the function we discuss here is a more strategic, higher level buffering function, a gatekeeper rather than a schedule keeper. It is also worth noting that followers who perform this gatekeeper function might also be a more approachable contact point for other followers than the leader

themselves, which might facilitate worthwhile communications that would otherwise not occur. This transitions us nicely to the final social facilitation function: interpreting and translating.

*Interpreting and translating.* As we have argued throughout, charismatic leaders must be set apart from their followers, at least to some degree. Being set apart includes the presence of social distance (Etzioni, 1961; Katz & Kahn, 1978), and the likelihood that charismatics are different from their followers in some significant ways. This situation raises a very real practical problem: making sure that the people charismatics are trying to lead understand them. Good squires can help ensure that key stakeholders understand the vision by interpreting and translating when necessary. In fact, many accounts note that charismatic leaders are often poor day-to-day managers and, as necessarily socially distant from the masses, can lose touch with their followers' wants and needs (Conger, 1990; Zaleznik, 1977). Squires can act as translators, managing communication down to the followers and up to the leader, clarifying each parties' roles and responsibilities, in a way that protects the charismatic leader from the daily minutia of management, and that protects followers from the sometimes capricious and disinhibited natures of charismatic leaders—thus helping them continue to make the decision to follow (Keltner et al., 2003; Lindholm, 1990; Maccoby, 2000; Sankowsky, 1995).

Consider, for example, the case of visionary technology CEOs and the need for them to be understood by technically oriented employees who write code, engineers who ensure manufacturing quality, as well as financial stakeholders. In the early days of Sun Microsystems, founding CEO Vinod Khosla propounded what apparently seemed to some audiences to be outrageous visions. Scott McNealy, his squire at the time, would often find himself translating Khosla's ideas for those audiences (notably financial backers). Clearly,

Khosla's vision was critical. However, without McNealy serving this translating function, key resources may not have been made available to one of the most cutting-edge technology ventures of its day (Southwick, 1999). Trevor Abbott, Richard Branson's squire at Virgin Enterprises for over a decade, frequently had to placate bankers disconcerted by Branson's outrageous ideas, and persuade them that the deals were legitimate and would be financially viable (Bower, 2000). Similarly, Jean Chrétien grounded Trudeau's highly intellectual analyses in down-to-earth terms and anecdotes which some parts of Québécois society could more easily digest (Clarkson & McCall, 1990).

Often, squires are used as trusted messengers to represent the charismatic leader in situations he can't or doesn't want to be in. For example, New York City Mayor Rudy Giuliani often used Peter Powers, the first Deputy Mayor of Giuliani's administration, to scold followers who were out of line (Kirtzman, 2000). Trevor Abbott did so much of Richard Branson's dirty messenger work that, when their working relationship fell apart, Branson was left with no one to fire Abbott (Bower, 2000). Harry Hopkins, longtime advisor to Franklin D. Roosevelt, was the only follower trusted to engage in diplomatic missions with Churchill and Stalin during the early years of World War II (Adams, 1977).

The need for interpretation and translation is bidirectional. Maccoby (2000), for example, has argued that leaders with great visions are often poor listeners, lack empathy, and dislike mentoring. Drawing on a large body of empirical literature, Keltner and others have identified a number of consequences of power that might increase the need for an interpreter between followers and charismatic leaders (Keltner et al., 2003; Magee et al., 2005). Powerful people tend to be more behaviorally disinhibited, less thoughtful in their decision making and behavior, and less likely to receive honest feedback from others over whom they have power. Further, powerful people are more

prone to see evidence of their brilliance than they are to see any disconfirming evidence (Keltner et al., 2003; Magee et al., 2005). All of these factors suggest that a trusted and loyal squire could be very helpful. Whereas a charismatic leader might be disinclined to listen to honest feedback, a trusted squire could make sure important points get through, and that feedback and input not directly available to the leader is synthesized and shared. Similarly, offering information not otherwise available and corrective to personal biases represents an important role for a squire vis-à-vis their leaders.

Squires can also serve as important sounding boards for their leaders. Kets de Vries (1995) has written about the isolation experienced by leaders once they reach top positions, which can be, in the literal sense of the word, peerless. Squires can therefore provide one of the only relational environments in which charismatic leaders can let down their guard and ask for honest feedback. Over his 30 years of close friendship with Roosevelt, Harry Hopkins became one of the only people with whom Roosevelt could engage as a peer; Roosevelt even had him move to the White House and vacation with his family because of the important role Hopkins played in maintaining Roosevelt's engagement with the world (Adams, 1977).

Finally, important recent research has demonstrated how valuable it can be for leaders to have central roles in the social networks of the people they lead (Balkundi & Harrison, 2006; Balkundi & Kilduff, 2006). Because of the dual necessity of difference and distance, this is not an advantage that is often available to *charismatic* leaders. However, charismatic leaders can still benefit from the critical information and social resources present in the dense center of insider networks. A good squire who is central in that network might also bridge the structural hole (Burt, 1992) that typically separates a charismatic leader from the tightly knit center of follower networks. Two propositions flow from this discussion:

**Proposition 9:** Charismatic leaders will have a better understanding of their followers' perceptions and needs when they have a squire (or squires) who actively interprets and translates for them.

**Proposition 10:** Followers of charismatic leaders will have a better understanding of the objectives and needs of their leaders when their leaders have a squire (or squires) who actively interprets and translates for them.

To summarize, we have argued that squires are defined by the four key functions they serve—liberating and legitimizing, modeling, buffering, and interpreting and translating—and that these social facilitation functions are particularly essential in the context of charismatic leadership, where leaders must contend with the challenges of difference and distance. Squires help to define the relationship between followers and leaders as charismatic, to support the decision to follow, to ensure mutual understanding, and thereby reinforce effective follower behaviors and ongoing following, as laid out in Figure 1. We now turn our attention to the life cycle of a squire, including whether squires can replace their charismatics as charismatics themselves, defining contextual moderators that predict or support squires' emergence, and reflecting on some possible alternatives to squires.

*The life cycle of a squire.* Though we have focused primarily on the consequences and effects of squires rather than on squires themselves, it is worth briefly considering the positive and negative potential consequences of *being* a squire, since this may set the stage for worthwhile empirical research in the future. The most obvious positive outcome of being a squire is the strength of their relationship with charismatic leaders, often offering them influence beyond their official positions and ultimate accountabilities. Harry Hopkins was able to strongly influence many of the programs that made up the New Deal and to represent the US

on major diplomatic missions, without being elected president of the United States (Adams, 1977). Indeed, squires may be able to get their leaders to buy into and sell aspects of their own visions. In the tacit partnership of leader and squire, it is not necessary that all aspects of the vision be generated or conceived by the leader, though it might be publicly presented as such.

However, there are many potentially negative outcomes for squires as well. Squires run the risk of a capricious charismatic turning on them. Nik Powell, an early squire of Richard Branson who consistently saved Branson from bankruptcy, made payroll, and met their legal obligations to their bankers, was reportedly forced to resign after a fight during which Powell's honest feedback about Branson's risky purchase of two nightclubs invoked his ire (Bower, 2000). This suggests that if squires go too far in an attempt to reel in a charismatic leader, the effort can backfire. Squires are also unlikely to receive the credit they might deserve when things are going well. As documented in a classic study of British string quartets, the "paradox of the second fiddle" could be familiar to a charismatic leader's squire:

[Second violinists] must have consummate ability that rarely finds complete expression; they must always play the role of supporter during a performance, even if the first violin seems wrong; and they get little attention but nevertheless provide one of the most salient bases for evaluating the quartet as a whole. (Murnighan & Conlon, 1991, p. 169)

In terms of what happens at the end of the squire's life cycle, Murnighan and Conlon (1991) noted that some "second fiddles" go on to become dynamic first violinists in their own, or a different, quartet. Others just seem to remain outstanding second fiddles. Max Weber's argument that charisma is a volatile and short-lived phenomenon that tends to give way in any given setting to some form of routinization also finds anecdotal support in our examples throughout. For example, both Tim

Cook and Jean Chrétien were effective in their roles both as squires and, ultimately, as leaders, but it is hard to avoid the conclusion that their organizations were a good deal less exciting after they took over, and that they were a good deal less charismatic and emotionally engaging than their charismatic predecessors.

*Contextual moderators of squires.* Under what conditions are squires most likely to emerge? In the most basic sense, the key boundary conditions around squires are undoubtedly the same as the boundary conditions for the emergence of charismatic leadership. For example, charisma is more likely to emerge (Beyer, 1999) and to matter (Waldman, Ramirez, House, & Puranam, 2001) under conditions of uncertainty. It may also be more common in entrepreneurial and organic, as opposed to mechanistic, contexts (Yukl, 1999). Thus, squires are more likely to emerge in turbulent market environments or new ventures, or other uncertain contexts where anxiety is heightened among potential followers.

Squires may also be more likely to emerge to meet the downside risks associated with particularly volatile charismatic leaders. Though all charismatic leaders will benefit from squirely functions, some appear to require them more than others. Biographies of Richard Branson, for example, suggest that he may have failed as a charismatic leader without the squirely roles played by Nik Powell and Trevor Abott (Bower, 2000; Brown, 1998). Other charismatic leaders may have more skills consistent with squirely functions, perhaps making squires less necessary in some circumstances.

Though there is undoubtedly an organic process playing out in the formation of charismatic-squire bonds, the likelihood of a squire emerging within an organization can be facilitated by certain structural decisions at the organization level. In this respect, organizational structure may be a key factor determining the likelihood that squires are present and succeed in their functions. For example, the White House Chief of Staff, an office first created during the

Eisenhower presidency, represents a structural solution to some of the challenges that good squires address. A former White House staff historian sees the chief of staff as the “boss of none, but overseer of everything” (Patterson, 2000, p. 348). The chief of staff has discretion to operate as the communication mediator between the president and his senior staff (interpreting and translating), and controls the president’s schedule, deciding who meets with the president, when issues are taken to the president and when they are delegated away from the president (buffering). Erskine Bowles, Chief of Staff under Bill Clinton, commented that “I don’t have the vision; I can’t dream like Bill Clinton. I can’t see the things that he can see . . . But I am a doer; I can get things done” (Patterson, 2000, p. 353).

Squires might also be structurally encouraged by the position of chief operating officer. In a corporate world in which boards increasingly seek charismatic CEOs from outside their companies and often outside their industries (Khurana, 2002), the rise of the COO position may offer some support for our argument about the benefit and need for squires. Chief operating officers are sometimes classic squires, as they are often executives promoted from within rather than charismatics parachuted in from outside, and their job is to operationalize a leader’s vision. Given their operational focus, they are well positioned to both translate and determine when to buffer. However, “squire” is not a job description, and is not defined by an organizational role. A squire *might* be a top-management-team (TMT) member, or a COO, or a really exceptional executive assistant for that matter. But a squire is someone in a uniquely trusting and close relationship with a charismatic leader who performs the social facilitation functions outlined. We acknowledge that some roles are more conducive to squires than others (COO, as noted), but a squire could theoretically emerge in any number of formal or informal capacities.

*Alternatives to squires.* The high levels of trust and closeness required between squires and



charismatic leaders means that trying to *hire* a squire would be challenging. This may be why there are many examples of squires who have known their charismatic leaders since childhood (e.g., Nik Powell and Richard Branson, Peter Powers and Rudy Giuliani). Alternatively, sometimes the closeness might be forged in mutual trials (e.g., Nehru and Gandhi), or a natural chemistry that emerges around tasks in an organization (e.g., Fujisawa and Honda). However, even if the situation is right for the emergence of a charismatic leader, does a charismatic leader really need a *squire*, or might some other configuration achieve the same ends?

The world is a complicated and heterodox place, and no single configuration will ever be the only answer to an important question. It is possible that other configurations may emerge to meet the social facilitation functions squires serve. For example, Roosevelt arguably set up a squirely team in his “Brain Trust,” the group of close advisors on whom he depended in creating the New Deal (see Tugwell, 1968). Some could argue that top management teams might play a collective squirely role to certain charismatic leaders and, certainly, top management teams often provide an important modeling function for charismatic CEOs (Waldman & Yammarino, 1999). The social facilitation functions we have proposed also suggest some circumstances in which multiple squires might be particularly effective. For example, in a multidivisional company with very different divisional cultures and technologies, or in a global corporation, a squire in each group might be required to generate the kind of psychological legitimacy, identification, liberating, and modeling that would be most efficacious.

Still, in the smaller organizations that make up the vast majority of economic and social activity in the world (Aldrich, 1999), a single squire may be the most common and most efficient configuration. More importantly, the psychology and experience of charismatics as

the literature documents it and as we have reported here—possessing counternormative visions, disinhibited, powerful, focused, driven, frequently poor listeners—increases the likelihood that a squire will be the most likely social facilitation solution for charismatic leaders. Importantly, the possibility that the functions of a squire might be addressed by some other configuration of people does not invalidate the core insights in the model or the need for the role any more than the presence of alternative leadership configurations (e.g., co-CEOs, shared leadership, etc.) invalidates the role of the leader or things that can be said about that role.

*Applicability of our theory beyond charismatic leadership.* While our argument was designed to respond to the unique dilemmas charismatic leaders face, we do not claim that the social facilitation functions we identify are relevant or helpful only to charismatics, and indeed, we believe that each of the functions we identify could be helpful to any kind of leader. However, as we have argued throughout the paper, we believe the social facilitation functions we identify are particularly important in the context of charismatic leadership, because of their particular ability to address the paradoxes of difference and distance. These paradoxes are more important to charismatics because attributions of exceptionality and remarkable giftedness are definitional to charismatic leaders.

## Contributions and implications

This paper aims to enrich the literature on charismatic leadership by demonstrating the importance of social facilitation to charismatic leadership processes, and to advance the literature on followers in all leadership processes by focusing on the active and differentiated roles squires can play in the charismatic leadership process. In so doing, we have also developed an understanding of followers that differentiates among followers, exposes the active roles of



followers in the leadership process, and shows how followers influence whether leadership emerges, endures, or is effective.

We have married insights from a broad range of distinct, strong, and coherent theoretical traditions within the social and organizational sciences (intergroup relations, social conformity, social learning, social influence, organizational structure, the psychology of power, and theories of reasoned action and planned behavior) to elaborate four functions that facilitate charismatic leaders' effectiveness. Part of our contribution, in fact, is that we have located these dynamics in a complex phenomenon (squires), and we believe that it is the act of viewing this phenomenon from multiple perspectives that makes its coherent dynamics apparent. Perhaps one of the reasons the processes that support charismatic attributions and effectiveness have been hitherto underexplored and theorized is precisely because its complexity (like all human complexity) fails to be comfortably bounded by a single theoretical perspective or tradition.

Some might argue that squires are simply a situational variable that has been allowed for in contingency theories of leadership. We disagree. Leadership theories that attend to the importance of situational variables, such as Fiedler's contingency theory (Fiedler, 1978), Evans' and House's path-goal theories (Evans, 1970; House, 1971), or Kerr and Jermier's (1978) theory of substitutes for leadership, tend to focus on strictly *situational* variables, such as characteristics of the organization, team, or task. The idea that specific types of individuals playing particular kinds of supporting roles might facilitate leaders has received little attention in the leadership literature (though Galvin et al., 2010 is a very recent exception). Our argument about squires facilitating charismatic leadership focuses on their role as a factor in the charismatic leadership process, and what we perceive to be the necessary interaction among leaders, their followers, and the situation. In so doing, we have also contributed to

understandings of charismatic leadership in particular, specifically with respect to its socially facilitated nature.

### Future research

Our preliminary consideration of the functions and effects of squires for charismatic leaders invites a number of future empirical studies. For example, whether the similarity of a squire to followers conveys legitimacy on a leader is just one eminently testable proposition. It would also be possible to test experimentally whether a squire makes individuals more likely to perceive a leader to be charismatic, to choose to follow a charismatic leader, or to exhibit desired follower behaviors. In the field, developing a list of organizations with charismatic leadership and studying the presence and absence of squires in them may provide insight into our propositions about the effects of squires on leadership effectiveness and charismatic endurance.

Where this paper has been focused on the consequences of, and need for, good squires who fulfill four particular functions for charismatic leaders, future research could also investigate the motivations, interests, and capacities of those who become squires. Why do people become squires? What makes for a good squire? It would also be worthwhile to better understand what happens to squires over the course of their relationship with charismatics, whether they are chosen as successors and under what circumstances, or whether some squires aspire to be leaders while others do not, and whether such a factor affects their performance as squires.

Of particular interest to us are the developmental stages of squires who serve at the pleasure of charismatic leaders. Some of the squires we referred to in this paper went on to replace their bosses, a circumstance which offers an interesting parallel to the medieval squire who was generally considered to be a knight in training. What determines whether squires become charismatics in their own right,

or whether they choose to be serial squires? Anecdotally, the former seems less frequent than the latter. However, Weber's argument that charisma is a volatile and short-lived phenomenon which tends to give way in any given setting to some form of routinization (M. Weber, 1947) also finds anecdotal support in our choice of examples (e.g., Jobs to Cook). Yukl (1999) has also documented the short-lived nature of charisma. Given some of the beneficial consequences of charismatic leadership, this may be unfortunate for organizations. Recent empirical work that questions the long-term benefits of charismatic CEO leadership (Agle, Nagarajan, Sonnenfeld, & Srinivasan, 2006) raises a provocative research question: Is the presence of an effective and loyal squire a key moderator in the longevity of charismatic attributions about a leader?

This raises yet another research question for us: can squires be charismatic leaders themselves in their own organizations, or must they move to a new context to be characterized as charismatic? One could imagine studying attributions of charisma within the organization in which a person served as a squire, and then attributions of charisma in a new organization in which they assume formal, ultimate leadership responsibility. If squires must move to become known as charismatics, it would support the notion that attributions of charismatic leadership, and the emotional engagement of followers that accompany such attributions, truly do hinge on outsider status for the leader, which is one of the key reasons why we have argued for the beneficial moderating role of squires in the first place. Indeed, we have argued that the tenure of charismatic leadership may be supported by ensuring that the leader is not associated with the bureaucratic minutia of management or too much direct, unmediated contact with followers. After being mired in managing such minutia, it may be difficult for a former squire to mount a pedestal as the resplendent object of followers' affection.

Finally, and perhaps somewhat ironically given our preferred emphasis on the context in which charismatics are embedded rather than their personal traits, *per se*, there would be merit in exploring the personal qualities and characteristics of people who play the role of squire. Certainly, some squires are ultimate leaders in training. Murnighan and Conlon (1991) noted, for example, that second violinists were the players most likely to leave a string quartet, specifically to take up an opportunity to play first violin in a different setting. However, other second violinists, and we would posit some squires, seem happy with that particular role, and they and the other members of their ensembles see that as a critical contribution to the group's effectiveness.

### *Practical implications*

If it is true that squires facilitate charismatic leadership, what are the practical implications for those who aspire to lead charismatically, or those who choose to follow charismatic leaders? The first implication is good news for decision-makers: there is a component of leadership context over which they might have some control. If sociologists and social psychologists have taught us anything, it must be that behavior conforms, at least in part, to the systems and structures that contain it. What we offer here is one potentially significant contextual factor that can be influenced directly and (potentially) with relative ease: find a squire who can serve the four functions in Table 1 to address the challenges inherent in charismatic leadership.

Another practical implication is that charismatic leaders, or those who hire and anoint them, should consider the very important functions that are documented in Table 1 and depicted in Figure 1. If a single squire cannot meet these needs, strategic consideration should be given to designing a larger configuration that will. Further, a board of directors that selects a charismatic outsider for understandable and

justifiable reasons should do so with a plan to address the functions and needs we have identified. Such a plan should include mechanisms for protecting the squires (if a squire is the chosen solution), who might be as critical to success as the top executives to whom they report. In other words, a wise board will appreciate that if the benefits of charisma are desired, then the context that makes it possible and sustains it must be created and maintained. Further, it is quite possible that an individual with the personal traits associated with charisma and a track record of success (Keltner et al., 2003) will not appreciate the degree to which past or future successes are contingent on such social supports. In such a case, the board must be prepared to require and bolster those social supports, whether they are in the person of a squire or a broader social facilitation system.

Khurana (2002) has argued that the pursuit of charismatic leaders is often disastrous for firms, and that less exciting leaders promoted from within an organization are often the best choices. Maccoby's (2004) response, in part, is that Khurana has failed to fully appreciate the rather remarkable outcomes that charismatic leaders have had in many corporations, especially in the areas of effecting change and driving innovation. Organizations can benefit from the enthusiasm, energy, and emotional engagement that a charismatic leader can offer. They also need a steadying hand. Though it is easy to attribute the moving performances of successful string quartets disproportionately to their salient and central first violinists, and fun to focus on their evident artistry, true musical connoisseurs recognize that the beauty of the first violinists' work is amplified and showcased by the unique supporting roles of the other players (cf. Murnighan & Conlon, 1991). Squires can facilitate how well a charismatic leader generates enthusiasm as well as steady the social system as it works to accomplish its goals. Like the second fiddle in a string quartet, squires are unsung heroes who undoubtedly

deserve more credit and our field's future research consideration.

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### Notes

1. <http://www.youtube.com/watch?v=aEssvKeDKGQ>
2. <http://knowledge.wharton.upenn.edu/article.cfm?articleid=2006>

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