

Towards a theory of Leader Identity Formation and its application in executive coaching

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Abstract

The article presents a Leader Identity Formation Theory (LIFT) which illuminates the dynamic identity formation process of individuals across identity stages and life domains. The theory underscores the importance of leader identity in organizational leadership development and leadership effectiveness. The application of the principles of LIFT in executive coaching are suggested, including incorporating the influence of enabling and derailing factors in individual leader identity formation processes. Specific coaching questions are included to illustrate and support leader identity development within the coaching process. A recommendation for further research is also discussed.

Keywords: *leader identity formation theory, executive coaching, leader self-efficacy, leader development, leader identity coaching*

Introduction

This article provides an exposition of Leader Identity Formation Theory (LIFT), its origins and application in executive coaching and leadership development. A definition of leader identity is provided, followed by an overview of the emerging research regarding the salience of leader identity in leader development. The characteristics of LIFT are described, supported by initial qualitative research. The application of LIFT in executive coaching is then discussed along with the need for further research.

Definition of Leader Identity

Leader identity is defined as the self-definition individuals and others ascribe to their identity as leader (Day & Dragoni, 2015; Gecas, 1982). According to a rich stream of identity research, identity is considered “a complex and changing representation of self-knowledge and self-

understanding” (Dutton, Roberts, & Bednar, 2010, p. 266). The psychology literature on identity and the self is multifaceted (Lawrence, 2018). The self is conceptualized as a multi-dimensional construct involving a variety of different elements such as personal characteristics, cognitive knowledge structures (schemas) and different mini-selves (Bachkirova, 2016a). Whilst there is disagreement as to whether (or how) these aspects comprise an overarching self-concept, there is growing alignment on the dynamic nature of various aspects of the self and the ways in which these aspects may be activated in different contexts (Ashforth & Schinoff, 2016; Epitropaki, Kark, Mainemelis, & Lord, 2017). The salience of different aspects of one’s identity in different contexts has been described as one’s ‘working self-concept’, whereby these different aspects of identity are brought to the fore based on their context (Lord & Hall, 2005; Markus & Wurf, 1987).

A recent review of the emerging leader identity literature defines one’s leader identity as a “sub-component of one’s working self-concept that includes leadership schemas, leadership experience and future representations of oneself as a leader” (Epitropaki et al, 2017, p. 9). An individual’s leader identity is considered a type of working self-concept that is activated in different contexts and formed throughout their lifetime (Miscenko, Guenter & Day, 2017). This aspect of the self is based on a person’s selective appropriation of past, present, and future. Building on Identity Theory (Gecas, 1982) and Social Identity Theory (Stets & Burke, 2000) individuals may integrate personal, role or collective level identities that are most meaningful to them, through a process of internalisation. In this way, internalising a leader identity is one identity, amongst the multitude of identities or aspects of the self, that may be available to individuals (Dutton et al., 2010).

Brewer and Gardner (1996) originally highlighted that individual identities may be construed at the individual, relational and collective level. As a result, theories of leader identity development have been suggested in the literature focused at these particular levels – personally based, role-level and organisational-level identities (Ibarra, Wittman, Petriglieri, & Day, 2014). For example, research by Marchiondo, Myers and Kopelman (2015) with 200 working adults in the US supported a relational-level construction of leader identity. Leader identities were shown to be internalized through the “claiming” and “granting” of leadership actions of participants. This research provided empirical support regarding the importance of dynamic social relationships in internalising a leader identity, where individuals “co-create reciprocal and mutually reinforcing identities” in relationship with each other, originally proposed by DeRue and Ashford (2010, p.628). A review of the broader

organisational identity research by Ashforth and Schinoff (2016) suggested that one's organisational identity (an example of a collective level identity) was achieved through a socially negotiated sensemaking process, between the individual and their organisational context. These researchers reviewed a range of motives that individuals employed to construct their identity including what they termed 'identity motives' such as personal growth and greater self-knowledge. Self-efficacy, defined as a belief in one's capability in a specific domain (Bandura, 1997), was also considered a driver of identity formation, whereby individuals reinforce their identity via gaining a sense of competence and effectiveness within their organisational context. These examples highlight how leader identity approaches have been conceptualized at differing levels of intrapersonal, relational, and collective levels and are contextually embedded (Ibarra et al, 2014).

Leader Identity in Leader Development

The role of leader identity in leadership development continues to expand in the academic leadership literature, with researchers highlighting leader identity as a critical component in leadership growth and effectiveness (Day & Dragoni, 2015; Ibarra et al., 2014; Miscenko et al., 2017). According to a leader identity review by Ibarra et al (2014), identity is a "potent force in leadership" that leadership scholars are gradually turning their attention to. Epitropaki et al (2017) state that of the 219 articles published on leader identity, 150 were in the last decade. This growing body of research reveals that leader identity has a range of positive impacts in developing leaders, including accelerated adoption of leadership competencies and enhanced motivation to lead (Chan & Drasgow, 2001; Kragt & Guenter, 2018; Miscenko et al, 2017). A recent study revealed that strengthening ones' leader identity accelerated the adoption of specific leadership competencies including valuing diversity, challenging the status quo and commitment to leadership action (Miscenko, 2017). Further, discoveries from this developing area of scholarship include positive impacts of leader identity on leader effectiveness, career longevity and role promotion (Day & Dragoni 2015; Lord, Hannah & Jennings 2011; Miscenko & Day 2016; Miscenko et al. 2017).

The positive impact of executive coaching on leadership growth and performance is also demonstrated in the leadership literature (Bozer & Jones, 2018; Grant, 2014; Theeboom, Beersma, & van Vianen, 2014). However, examples of leader identity perspectives applied in executive coaching settings are not yet evident in the literature. A search of leader identity approaches in executive coaching reveals an application in group leadership development

(Miscenko et al, 2017) and in several mentoring interventions (Zheng & Muir, 2015). In response to this dearth of leader identity approaches in executive coaching, this article proposes Leader Identity Formation Theory (LIFT) as another developmental lens. The proposed approach of LIFT conceptualises the formation of one's leader identity across an individual's lifespan, with a particular focus on the ongoing, dynamic identity formation process (Miscenko & Day, 2016). The approach is informed by qualitative research conducted originally by Skinner (2014) and is aligned with research which views identity as a dynamic, lifelong process (Miscenko & Day 2016).

Leader Identity Formation Theory (LIFT)

The proposed approach of LIFT emerged via original qualitative research conducted by Skinner (2014), utilizing a constructivist grounded theory approach (Charmaz, 2006; 2014). This research involved semi-structured interviewing of eleven female executive coaching participants. The research was founded in an interpretative philosophy whereby interview data was coded based on the salient themes emerging through a constant comparison of interview data (Charmaz, 2017). This research approach is aligned with sensemaking approaches, enabling a greater understanding of the complexity of identity, as suggested by various researchers (Ashforth & Schinoff, 2016; Dutton et al., 2010). As a result of this interpretive process, the formation of each individual's leader identity emerged as a key developmental focus of participants, during their coaching engagements (Skinner, 2014).

LIFT describes the intrapersonal process by which individuals come to see themselves as a leader. This process involves the ongoing reflection and internalisation of an individual's personal attributes, social, past, future, and current life experiences, which inform their identity formation process (Skinner, 2014). Within LIFT, leader identity formation is conceptualized as a dynamic internalisation process which involves a range of formation enablers and derailers that an individual may experience. Building on the original qualitative research by Skinner (2014), the process of leader identity formation is defined as:

A process of identity formation that forms and reforms over an individual's lifetime, through encountering a series of subjectively experienced intrapersonal, relational, and collective-level enablers and derailers. Leader identity experimentation and formation occurs cognitively, emotionally,

and socially across all life domains including the workplace, family, and community contexts.

This internalisation of a leader identity outlined in LIFT aligns to the interactional effects of identity construction suggested by DeRue and Ashford (2010), as participants in the original study described their ongoing negotiation of their leader identities in the context of a range of enabling and derailing factors. This qualitative research by Skinner (2014; 2015) revealed that leader identity formation occurred through a continuum of identity stages from an under-developed stage through to a forming stage and a well-developed stage of internalisation. This research also highlighted that the internalisation process occurred across life domains including work, family, and community contexts. Importantly, the stages of identity formation were subject to the individual, relational and collective level enablers, and derailers that an individual encountered. Based on an adaption from Skinner (2015), this individual-level internalisation process is outlined in Figure 1:

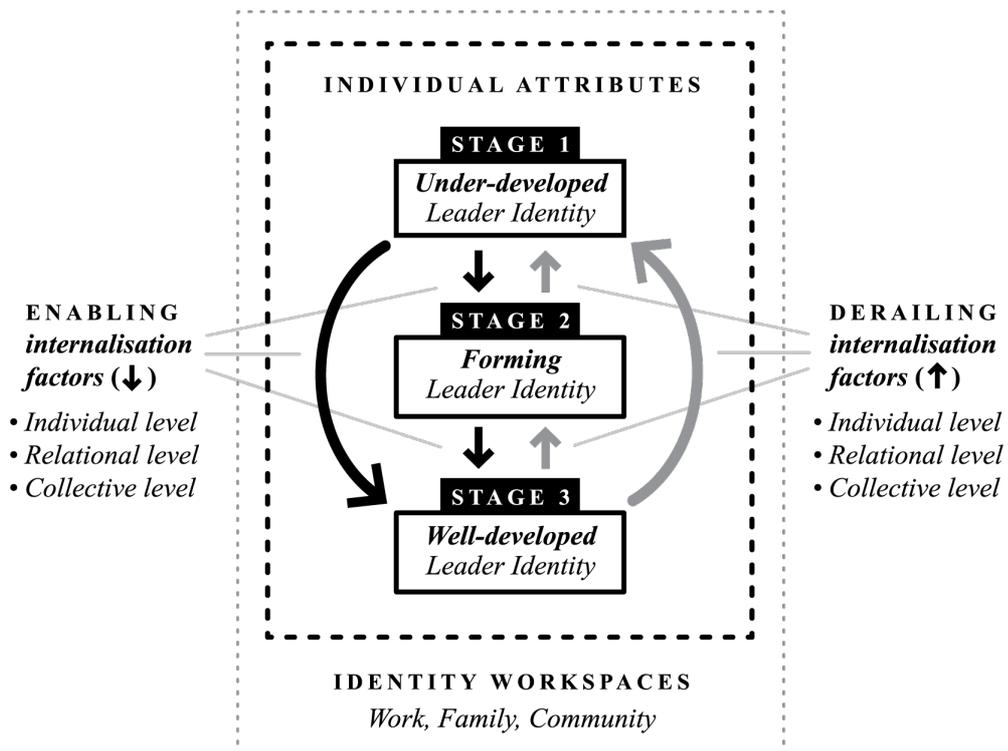


Figure 1: Leader Identity Formation Theory internalisation process

According to LIFT, identity formation occurs on a dynamic continuum which may involve cycling through various stages based on the enablers and derailers that an individual may encounter. For example, an individual may cycle through an under-developed leader identity to a forming leader identity stage due to experiencing various enabling factors, and then return to an under-developed identity stage due to experiencing various derailing factors, as outlined in Figure 1. In this way, the internalisation of a leader identity can be both a linear and a non-linear process, depending on the range of internalisation factors experienced by the individual. The downwards arrows in Figure 1 indicate that a well-developed leader identity stage represents a deeper integration of this identity within an individual's various aspects of self. This identity formation happens at the within-person level (based on their individual attributes) recognizing that this process is also embedded within various identity workspaces (the individual's broader context of work, family, and community). LIFT underscores the dynamic nature of leader identity formation including the myriad of ways in which a leader identity may form and reform over an individual's career or lifespan. The following section describes the three main characteristics of LIFT: Leader Identity Stages, Enabling and Derailing internalisation factors and Identity Workspaces.

1) Leader Identity Stages within LIFT

LIFT conceives three main stages through which individual internalisation of a leader identity occurs, outlined below:

Stage 1: Under-Developed Leader Identity. At this stage of formation, individuals do not "see" themselves as a leader. Whilst they may identify with other professional identities (e.g., I am a technical engineer), their self-identity as a leader is not internalized. Leadership is ascribed to external others and is not incorporated as an aspect of their self.

Stage 2: Forming Leader Identity. At this stage of formation, individuals do "see" themselves as a leader however the identity is not firmly internalised or clarified. This stage is characterized by the individual actively adopting various leadership approaches or mindsets in crafting their unique leader identity. Within this stage, individuals have an evolving schema for what leadership means for them, with an emphasis on continuing to refine their self-identity as a leader (e.g., I am a technical engineer and I recognize I am becoming a leader).

Stage 3: Well-Developed Leader Identity – at this stage of formation, individuals have internalised their leader identity which is described as a part of their self or ‘who I am’ (e.g., I am a leader and a technical engineer). Within this stage, leadership is internalised as a way of being, as individuals enact their leader identity alongside other aspects of the self.

As stated earlier, the formation process within LIFT may be linear and non-linear. Formation is influenced by enabling internalisation factors which support identity formation and derailing factors that may undermine an individual’s internalisation process (Skinner, 2014; 2015). Importantly these factors occur at the individual level (e.g., self-limiting or self-enhancing leadership schemas), relational level (e.g., validating or undermining team relationships) and collective level (e.g., shared or hierarchical leadership norms) which variously impact the formation process.

2) Enabling and Derailing Internalisation Factors within LIFT

LIFT brings to the foreground the centrality of identity enablers and derailers in the intrapersonal formation process. These are defined as the multitude of ways that individuals can be enabled and derailed in their leader identity formation process (Skinner, 2015). This approach encompasses both the positive enabling factors of identity formation, as well as the undermining factors where identities can be lost, destabilized and weakened, aspects of which have been called for greater attention in the literature (Ashforth & Schinoff, 2016; Ibarra et al, 2014).

The centrality of the role of enablers and derailers in LIFT aligns to and extends the process of identity construction suggested by DeRue and Ashford (2010). Where these researchers theorized the formation process at the relational level through social interactions, LIFT makes explicit the range of positive and negative factors that impact the individual formation process across all three levels, which emerged in the data. Skinner (2014) identified enabling factors across each level of interaction including achieving authenticity as a leader (within-person level), role models (relational level) and gender balanced organisations (collective level). The same study identified derailing factors across each level including self-limiting beliefs (within-person level); role expectations (relational level); gender-biased leadership norms (collective level) (Skinner, 2015). Data indicated that participants were navigating a variety of enabling and derailing factors in their executive coaching engagements, which reflected their dynamic cycling through stages of identity formation (Skinner, 2014).

Research by Lanka, Topakas, and Patterson (2019) involving 50 semi-structured interviews with working adults, revealed similar enablers for identity formation including the influence of role models and mentors. This qualitative research described ‘identity uncertainty’ as a barrier to identity formation, where individuals felt uncertain or unclear about their identity as a leader (Lanka et al, 2019, p. 8). However, the concept of identity uncertainty is characteristic of the stages of an Under-developed and Forming leader identity in LIFT. Within LIFT, feelings of uncertainty are normalised in the identity formation process, recognising these emotions as part of the formation process, particularly at the Under-developed stage (Skinner, 2015). The influence of identity enablers and derailers at individual, relational and collective levels was also discussed by Miscenko and Day (2016) in a review of 600 published articles on work identity. This review highlighted a range of factors which may enhance or detract from work identity formation, including changes in work role expectations, as discussed above. It also outlined studies that conceive identity formation as a dynamic, fluid process, aligned to the formation process of LIFT. The concept of identity derailers have also been reported in the identity literature as identity threats (Petriglieri, 2011). From this perspective individuals are considered to either change their identity based on the perceived threat or engage in activities to protect their working identity (Miscenko & Day, 2016). LIFT contributes to these various findings on identity by making explicit the continuum nature of formation, as individuals form and reform their leader identity, dynamically navigating the various internalisation enablers and derailers that they experience.

3) Identity Workspaces within LIFT

Within LIFT, the navigation and interaction of enablers and derailers takes the form of ‘identity work’ – described as the revising, reforming or strengthening of one’s leader identity (Miscenko & Day, 2016, p. 224). Notably this identity work is not limited to the workplace and incorporates various life domains including family and community contexts, termed identity workspaces (as outlined in Figure 1). This use of the term ‘identity workspaces’ broadens the original use of the term by Petriglieri and Petriglieri (2010) where it was defined in reference to institutions and organisations. Within LIFT, ‘identity workspaces’ is used to capture all the life domains in which identity work is conducted. Hammond, Clapp-Smith, and Palanski (2017) point out that cross-domain leader identity development is under-investigated and future research across these domains may offer further insight into leader identity development. LIFT emphasises that identity work represents the active engagement by individuals in forming (or re-forming) their leader identity. This active

engagement is critical to creating a sense of personal coherence and distinctiveness in each individual's leader identity formation, as they engage in revising and strengthening this aspect of their self (Epitropaki et al, 2017; Sveningsson & Alvesson, 2003).

LIFT recognizes that individuals start at varying places in the leader identity formation process, based on their subjective experiences and their individual identity workspaces (contexts). This perspective acknowledges that each individual's internalisation process is highly subjective, varied, and open to change. This subjectivity is also found in the leadership development literature regarding personal trajectories (Day, 2011). It is also important to note that the cyclic nature of forming and reforming one's leader identity, evident in the LIFT process, is not yet captured in the leader identity literature. This has important implications for the application of LIFT in executive coaching, as discussed in the next section.

Applications of LIFT in Executive Coaching

Leader identity work was revealed as a core feature of executive coaching in the qualitative research by Skinner (2014; 2015). The executive coaching format is particularly suited to clients engaging in identity work given that this work often involves clients aiming to achieve a level of authenticity in their leadership, helping them navigate various aspect of the self in different contexts (Gardner, Avolio, Luthans, May, & Walumbwa, 2005; Lawrence, 2018). Coaching involves working with the constructed narratives of clients that may give their leadership identity coherence and purpose. Through engaging with the client's lived experience, coaching fundamentally represents working on a client's "internalized and evolving narratives of the self" (McAdams, 2001, p. 100). This perspective aligns to concepts of multiplicity theory in coaching as outlined by Bachkirova (2016b) whereby coaching enables clients to explore different aspects of the self and gain a deeper understanding of these various aspects. For example, this may mean the coaching practitioner may assist the client in differentiating and aligning their leader identity with their professional identity, in service of their performance.

In this way, leader identity coaching represents an identity lens that coaches can bring to executive coaching engagements. This application of LIFT in executive coaching is particularly relevant, given the importance of leader identity to enhanced leader performance, highlighted in the literature (Epitropaki et al., 2017). In applying the principles of LIFT, coaching sessions may be oriented towards:

- Helping clients clarify their unique leader identity formation stage. This may involve normalizing an under-developed leader identity and engaging in dialogue to understand the client's meaning-making when it comes to leading.
- Identifying strategies to overcome derailers. This may involve making explicit the personal, relational, or collective level derailers that may be undermining the client's identity formation process.
- Amplifying cross domain enablers and strengths for leading. This may involve actively exploring the leadership qualities or strengths that clients may show in other identity workspaces (family and community) and designing strategies to translate these into their workplace context.

This selection of leader identity coaching techniques involves explicitly investigating LIFT principles, which may empower clients to act from a greater sense of self, with more purpose and enhanced self-efficacy in a leadership domain (Ashforth & Schinoff, 2016). The individually tailored, confidentially safe and solutions-oriented aspect of the coaching approach also supports the depth of insight and reflection required in identity work – by both the client and the coach (Bachkirova, 2016b; Grant, Curtayne, & Burton, 2009).

Another application of LIFT lies in supporting the case conceptualization for coaching clients (Spence & Oades, 2011). LIFT provides a guide for explicit inquiry into identity, including questions of identity variance across the lifespan and across life domains (refer Appendix 1). The purpose of these lines of inquiry is to assist coaching clients in broadening their perspective of leadership. This may be as it relates to their life experience and/or the ways in which they may have been leading in different domains (home, family, community) or life stages (teenage years, early adulthood and so forth) (Hammond et al, 2017). The questions presented in Appendix 1 inquire beyond the workplace and encourage clients to access often hidden or unrecognised aspects of their leader identity formation, which may assist them navigating current leadership challenges. Applying the coaching strategy of developing discrepancy between past, present, and future leader identities can provide powerful momentum for change (Grant, 2014).

The proposed staged approach of leader identity formation within LIFT provides coaches with a useful heuristic to explore the current stage of formation that a client may identify with. As stated earlier, identity formation and reformation occur because of subjectively experienced enablers and

derailers (which may be experienced at individual, relational or collective levels). Re-formation may be realized through transitions of the identity stage (from under-developed to well developed) or through a reforming of how one describes their leader identity. It is the subjective experience of enabling or derailing factors that may accelerate, weaken, or change an individual's leader identity (Skinner, 2015). Skinner (2015) highlighted that coaching can specifically target these stages, helping clients to take a reflexive stance on their own formation at the under-developed, forming or well-developed stages, and to co-create strategies with their coach to continue their leader identity formation, or re-formation.

LIFT also encourages coaches to investigate the multitude of potential leader identity enabling and derailing factors that clients may experience. This multi-level recognition potentially stimulates coaches to inquire across individual, dyad, team, organisation, and societal levels, to capture and appreciate the complexity of influences that may impact the client's leader formation process.

Questions that explore the client's internal schema for leading, particularly their implicit leadership theories (mental models) are another avenue for exploration in coaching sessions (Lord, Hannah, & Jennings, 2011). LIFT suggests that internally held standards for leading may form both enabling and derailing influences in the formation process (Shondrick, Dinh, & Lord, 2010). For example, questions regarding the prevalence of hierarchical leadership norms in one's organisation, team or internal mindset can provide fertile ground for assisting clients to transition from "other-authorship" to "self-authorship" in a leader domain, which is a key developmental challenge (Hannah & Avolio, 2010).

Limitations and future research

The proposed approach of LIFT is in its initial stages of conception. Further qualitative and quantitative research is required to further support the proposed theoretical approach, including the role of individual, relational and collective level enablers and derailers on individual formation processes. Whilst the original qualitative research by the author was conducted several years ago, the findings align to recent reviews in the leader identity literature. These initial findings support the need for further research in understanding the dynamic intrapersonal processes involved in leader identity formation, including further investigating the identity stages which emerged within LIFT.

Conclusion

The approach outlined in LIFT emphasizes the importance of leader identity formation to performance, highlighting that leader effectiveness is enhanced through developing a stronger leader identity (Guillén, Mayo, & Korotov, 2015; Kragt & Guenter, 2018). The LIFT approach confirms that leader identity work - revising, strengthening, rebuilding one's leader identity - occurs across all life domains, from family to community to social relationships and is not limited to the workplace, aligning to recent reviews in the literature (Epitropaki et al, 2017). LIFT contributes to our knowledge of identity pathways in leadership and makes explicit the ways in which leader identity formation may be undermined. The approach sheds new light on how leadership growth can go awry, addressing a current gap in the leader identity literature (Ashforth & Schinoff, 2016). This insight may open new opportunities in executive coaching and leadership development interventions aimed directly at mitigating leader identity formation derailers.

Adopting a leader identity perspective encourages coaching practitioners to explore potentially hidden enablers and derailers within the various identity workspaces, whilst also appreciating the diversity of identity pathways that clients embark upon. The practical implications for LIFT involve executive coaches appreciating the individual richness in leader qualities that each person brings to leading, encouraging executive coaches to broaden their lens of inquiry and tap into the leader potential that may be already present across their client's lifespan (Day, 2011). Adopting a leader identity lifespan perspective in coaching enables coaches to uncover potential client resources, practices, and perspectives in service of their client's leadership and life goals.

Future research in leader identity is required to further explicate the intrapersonal processes involved in leading and to understand the ways in which leader identity formation may be accelerated. Both qualitative and quantitative inquiry may complement the current literature focused on leader identity. This article suggested new ways of integrating the theoretical insights of LIFT into executive coaching practice. Further integrating new theoretical insights on leader identity into practice may lead to new breakthroughs in leadership development initiatives (including executive coaching) which may contribute to greater leader sustainability, wellbeing, and performance.

As executive coaches work to facilitate their client's leader development, the LIFT approach provides a developmental framework for understanding and accelerating leader effectiveness at the individual identity level. Adopting a

leader identity perspective represents a critical new pathway for both the client (and coach) to explore, in service of the clients' ongoing leadership growth and performance outcomes.

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Appendix 1: Operationalizing LIFT for Executive Coaching

The following questions are provided to illuminate the avenues of inquiry made salient in LIFT and which are specific to leader identity formation.

Sample questions are listed below. These questions are suggested as a guide for executive coaches to explore, with the hope that they may inspire additional fruitful identity formation questions with their coaching clients:

Leader identity strength questions:

- How strongly do you see yourself as a leader?
- How important is it that others see you as a leader?

Leader identity clarity questions:

- How would you describe your leader identity?
- Who are you being when you lead?
- Who are you aspiring to be as a leader?

Leader identity formation questions

- How would you describe how you have become a leader?
- Where are you in the process of forming your identity as a leader?
- What does your future leadership self look like?

Leader identity lifespan questions:

- How is the strength of your leader identity different (or the same) today, as it was a year ago? What is behind this?
- How strong was your leader identity in your earlier years? What is different or the same today? What do you put those differences down to?
- What leadership qualities were you showing back then? How are these relevant to your leadership now?

Leader identity across life domains questions:

- How do you lead with your family? Friends? Community? (and so on)
- What leadership qualities or strengths do you draw on in those areas?

- How does this compare to your workplace leadership? What qualities do you embody in the workplace?

Individual level enablers and derailers questions:

- What beliefs or assumptions about leadership enable you to realize your leader potential?
- What does leadership mean to you? Where did you learn that this was leadership? How is it relevant to your leadership today? (implicit leadership schemas)
- What feedback may indicate your leadership is not received well? (possible identity threat)

Relational level enablers and derailers questions:

- When you take the initiative to lead, how is it received by others?
- How often do you experience validation of your leadership? What does this validation look like?
- How strongly does your leadership match what your team or organisation values in leadership? (role prototypicality)

Collective level enablers and derailers questions:

- How would you describe the dominant leadership norms in your organisation?
- Which leadership behaviours get rewarded? Which get penalized?
- What organisational processes or systems support or undermine your leadership?

Leader re-formation questions:

- Where are you in the process of re-forming your leader identity? What is influencing this?
- How does your experience of derailers (obstacles/challenges) contribute to your leader identity today?
- How have you accelerated your identity? How have you managed the derailers?

What aspects of this re-forming process have been useful for you?