# SYSTEMATIC LITERATURE REVIEW OF PERSPECTIVE-TAKING IN SOCIAL EXCHANGES: IMPLICATIONS FOR MANAGEMENT AND LEADERSHIP

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## ABSTRACT

Contemporary research in the area of perspective-taking in the workplace has begun to challenge our view of how it is currently conceptualised and measured. Whereas individual-level perspective-taking was initially assumed to be a predominantly cognitive process, recent empirical work has documented the complexity of perspective-taking and scholars are starting to acknowledge that perspective-taking should not be considered in subjective isolation but in conjunction with sociocultural, affective, and organisational practices. As such, this paper provides an extensive look at perspective-taking within the context of social-exchange theory through a systematic review methodology. Three core research themes are found within perspective-taking literature: (a) emotional reconfiguration; (b) cognitive reconstitution; and (c) social and organisational familiarisation. These research themes are linked with arguments derived from leader–member exchange (LMX) theory to advance a framework of how perspective-taking may affect social-exchange relationships and consequent organisational outcomes.

## KEYWORDS

Perspective-taking, LMX, social exchange, social-exchange relationships, leader–member relationships, team performance

## INTRODUCTION

The fundamental construct of perspective-taking (PT) is a well-established and significant area of study in social psychology, organisational behaviour, and leadership studies. Following Davis's (1980; 1983) seminal work on empathy and PT, developing attention to PT in other fields such as anthropology, information sciences and sociology has culminated in a substantial body of literature verifying the complex antecedents, moderators, mechanisms and outcomes of PT at the individual, team and organisational levels (Ku et al., 2015; Litchfield & Gentry, 2010; Longmire & Harrison, 2018). Perspective-taking – which can be defined as perceiving a situation or understanding a concept from alternative points of view – has been linked to favourable relationship outcomes at work (Grant & Berry, 2011; Ng et al., 2021), increased team creativity through co-operation (Hoever et al., 2012), increased citizenship behaviours at work (Parker & Axtell, 2001; Pohl et al., 2015) and enhanced mental and physical wellbeing (Arnold & Walsh, 2015). Although prior studies have traditionally emphasised the more subjective and individual-level aspects of PT, recent evidence suggests more wide-ranging outcomes and mechanisms of PT as distilled in Ku et al.'s definition:

> perspective-taking helps individuals effectively navigate a world filled with mixed-motive social interactions. As a result of facing situations filled with mixed-motives, effective social navigation involves cooperation that helps create and preserve social bonds, as well as protection from being exploited by the competitive intention of others. (2015, p. 95)

This emergent definition emphasises the socio-cultural nature of PT and is a focal lens of how it will be understood in this paper, particularly in its application for leadership development and organisational behaviour. Although our understanding of PT has advanced in recent years (Longmire & Harrison, 2018; Ng et al., 2021), current research can be described as fragmented, having a propensity towards individual-level antecedents, and incomplete in differentiating between understanding other's perspectives (PT efficacy) and actually engaging in PT (PT

as process). Empirical work on PT and different outcome domains related to team- and organisational-level consequences (e.g., negotiations, team creativity) has progressed independently, and there has been little attempt to integrate findings from other disciplines (Ku et al., 2015). Thus, a systematic review that integrates prior findings with current research on PT can inform both theoretical and managerial practice regarding how this complex phenomenon functions. The objectives of this paper are to provide an integrated review of PT that consolidates established organisational-psychology studies with the broader PT literature and to offer recommendations for future research on PT in organisations.

## Social-exchange theory and perspective-taking

In this paper, social-exchange theory (SET) was chosen as an important theoretical lens in examining the nature of PT in organisations. SET supposes that actors operate from two distinct yet overlapping properties of self-interest and interdependence (Cropanzano & Mitchell, 2005; Settoon et al., 1996). Furthermore, SET suggests that actors unconsciously evaluate the advantages (as well as the risks) that coexist in entering or leaving a relationship. As such, this paper builds on Ku et al.'s (2015) research on PT as a socio-emotional resource that helps individuals navigate a world of mixed-motive social interactions. Moreover, Ku et al. (2015) argue that PT is more than just a personality trait, an ability, a process and an outcome, but is also a core socio-emotional resource that creates and conveys emotional displays of either co-operation, competition, or co-opetition (co-operative competition).

Following this line of reasoning, PT can then be understood as an archetypal theory of socio-emotional competency with prior established theoretical connections to anthropology, biology and sociology. Within leadership and management studies, PT has also been extensively studied particularly in its relevance, although not necessarily explicitly stated, to social exchanges embedded during times of crisis (Glăveanu & de Saint Laurent, 2018; Tuazon et al., 2021). Consider, for example, how important PT is for healthcare professionals in dealing with the current Covid-19 pandemic, to the point that most were willing to sacrifice emotional and physical wellbeing in order to mitigate the impact of the pandemic (Barello & Graffigna, 2020). Such expressions of sacrifice by healthcare professionals demonstrate their strong ability to sense the emotions of people in distress whilst concurrently regulating their own emotional distress in order to function optimally in their roles. The principal idea underpinning this account is that crisis in organisations, whether brought about by macro-level disruptions such as the pandemic or micro-level challenges such as interpersonal conflict, grievances and incivility, stir up potent affective processes and emotions (such as anxiety and frustration, and distress in extreme cases) that consequently impact social exchanges (Cortez & Johnston, 2020; Yu et al., 2008). While research to date remains limited, there is growing evidence linking how PT processes are likely to emerge out of affectively tinged and emotionally laden interactions between individuals at work (Cropanzano et al., 2017). This line of inquiry suggests that social exchanges serve as feedback events that shape the quality of potential and future exchanges through which socio-emotional competencies such as empathy and PT develop over time (Ashkanasy et al., 2017).

## AIMS OF THE STUDY

In this paper, I explore the complexity of PT through the lens of SET to construct a novel theoretical framework that consolidates current empirical PT studies from other disciplines. In sum and grounded on the interdisciplinary body of work on PT, it can be theorised as being both a multilevel (operating at individual, team and organisational levels) and multidimensional construct. Furthermore, current research supports three dimensions of PT that orient towards the cognitive, affective and behavioural aspects (Ku et al., 2015; Longmire & Harrison, 2018). Additionally, preliminary findings from the review suggest that rather than PT emerging as an independent intrapersonal ability, it operates through an analogous threefold process that implicates the importance of socio-cultural, affective and organisational practices. Essentially, experiencing this process provides an important purpose: it engenders individuals to make, or not make, social-exchange investments that would be critical for the socio-emotional development of PT. Over the course of the threefold process, individuals at work are then able to acquire as well as manage a broad range of information – social cues, task requirements and work interdependencies – to make sense of the complex nuances embedded in a social-exchange investment decision. Moreover, the threefold process

assists them to make an ongoing narrative that restructures the intrinsic risks and rewards associated with a mixed-motive social-exchange investment – in turn facilitating individuals to corroborate their decision regarding the interaction.

## METHOD

In order to explore leadership and management research on PT, I conducted a search in EBSCOHOST, PsycINFO, and Business Source Complete for all articles mentioning PT from 1975 to 2020. The year 1975 was chosen as this was the year Johnson's (1975) watershed study on co-operativeness and social PT was published in the *Journal of Personality and Social Psychology*. To ensure a comprehensive reporting of the key Organizational Behaviour/ Human Resource Management (OB/HRM) research base on PT, I also searched top-ranking journals identified by the 2019 Australian Business Deans Council (ABDC) Journal Quality List. A total of 521 articles was found as a result of this search. The criteria for inclusion consisted of: (a) using adults as participants (or student samples but with a distinctive organisational and management aim); (b) utilising quantitative or qualitative methods; and (c) adequately conceptualising PT. Journal articles that intended to measure sympathy or other-oriented empathy (e.g., organisational citizenship behaviour) were omitted from the review. On the basis of my systematic review of the articles, I identified three core research themes within the broader PT literature: (a) emotional reconfiguration; (b) cognitive reconstitution; and (c) social and organisational familiarisation. In the following sections, I delineate the main findings of the themes by linking them with theoretical arguments derived from leader–member exchange (LMX) theory. I also advance a novel theoretical framework that integrates the themes to offer recommendations on future PT research.

TABLE 1. SUMMARY OF EXEMPLAR STUDIES IN THE SYSTEMATIC REVIEW.

| Author(s) and Title of Study | Conceptualisation of PT | Key Findings and Implications |
|---|---|---|
| Brown-Schmidt, S. (2009). The role of executive function in perspective taking during online language comprehension. | "anticipating reference to a shared object" (p. 893) | "models of the use of perspective information in language processing explains why perspective information sometimes does and sometimes does not appear to constrain online interpretation. Difficulties in inhibiting the perspective-inappropriate information can account for some PT failures." (p. 898) |
| Cole, G. G., & Millett, A. C. (2019). The closing of the theory of mind: A critique of perspective-taking. | "Assuming another person's perspective requires neurological mechanisms that represents sensory processes associated with others' perspectives." (p. 1793) | "To take another person's perspective has to mean computation of how this kind of stimulus will change as a person's position in space changes, otherwise it is not a perspective." (p. 1793) |
| Flinchbaugh, C., Li, P., Luth, M. T., & Chadwick, C. (2016). Team-level high involvement work practices: Investigating the role of knowledge sharing and perspective taking. | Ability to view a situation from another's viewpoint | "Enhanced levels of employee PT serves in conjunction with high involvement work practices to drive increased levels of knowledge sharing and team service climate." (p. 145) |
| Gasiorek, J., & Ebesu Hubbard, A. S. (2017). Perspectives on perspective-taking in communication research. | "perspective-taking was variously treated as (a) an action or process, (b) a capacity or ability, and (c) a tendency or a trait with individual differences." (p. 94) | "An action or process conceptualisation positions perspective-taking as an activity that people (consciously) engage in or undertake; the emphasis in this treatment is on the series of mental actions (i.e., cognitive processes) an individual takes to arrive at a representation of another person's experience.39 A capacity or ability conceptualisation focuses on the extent to which a person is psychologically capable of engaging in perspective-taking, irrespective of whether they actually do it in a given set of circumstances. Lastly, a trait or tendency treatment emphasizes the likelihood that one spontaneously and regularly engages in perspective-taking, but does not necessarily speak to whether or not it occurs in a particular situation." (p. 94) |

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| Gehlbach, H. (2004). A new perspective on perspective taking: A multidimensional approach to conceptualizing an aptitude. | "the ability to understand how a situation appears to another person and how that person is reacting cognitively and emotionally to the situation." (p. 209) | Perspective-taking develops via two pathways: commitment pathway and performance pathway. The commitment pathway refers to how individuals "assemble their motivational resources which energizes their efforts to work on and complete tasks while the performance pathway refers to how individuals use cognitive resources to accomplish tasks in given situations." (p. 214) |
| Grant, A. M., & Berry, J. W. (2011). The necessity of others is the mother of invention: Intrinsic and prosocial motivations, perspective taking, and creativity. | "an intrapsychic or internal psychological process of adopting another's viewpoint." (p. 83) | Perspective-taking, generated by prosocial motivation, strengthens the association between intrinsic motivation (behaviour driven by internal rewards) and creativity. PT can directly enhance creativity by providing access to new ideas as well as increasing the usefulness of idea generation. |
| Gregory, B. T., Moates, K. N., & Gregory, S. T. (2011). An exploration of perspective taking as an antecedent of transformational leadership behavior. | "the mental act of perceiving a situation from another individual's point of view." (p. 809) | There is a positive relationship between a leader's dyad-specific perspective-taking and a subordinate's perception of that leader's transformation leadership which is consistent with the conceptualisation of transformational leaders as those who influence the perspective of their followers. |
| Gunalp, P., Chrastil, E. R., & Hegarty, M. (2021). Directionality eclipses agency: How both directional and social cues improve spatial perspective taking. | "Spatial PT is the process of imagining how an object or scene would appear from a viewpoint other than one's current physical perspective." (p. 1289) | "The present work aimed to examine the mechanisms that underlie the benefit in perspective taking when to-be imagined perspectives are based on a human figure." (p. 1299) |
| Li, C. R. (2016). The role of top-team diversity and perspective taking in mastering organisational ambidexterity. | "perspective taking as a cognitive process that entails attempting to clarify or consider the thoughts, motives, or feelings of others in relation to an object or topic, as well as why they think or feel the way they do." (p. 772) | "Perspective taking helps teams with a dual-way mental frame to resolve conflicting interests because it engenders a comprehensive evaluation of various ideas and facilitates integrating diverse perspectives." (p. 785) |
| Parker, S. K., & Axtell, C. M. (2001). Seeing another viewpoint: Antecedents and outcomes of employee perspective taking. | "reported empathy for the target (i.e. understanding target's problems and feelings) and positive attributions about a target's behaviour." (p. 1087) | Two immediate manifestations of PT have been widely documented: empathy towards the target and positive attributions about the target's behavior. The study's findings suggest the value of considering PT as a determinant of contextual performance. |
| Rupp, D. E., Silke McCance, A., Spencer, S., & Sonntag, K. (2008). Customer (in) justice and emotional labor: The role of perspective taking, anger, and emotional regulation. | "defined as the cognitive skill to consider and understand another person's psychological point of view." (p. 907) | "Individuals high in PT seem to be uniquely qualified to handle difficult customers with emotional finesse. These individuals may also show a heightened resistance to the stressors associated with these types of situations. Organisations in the service industry might therefore consider validating PT as a potential section criterion." (p. 919) |
| Russell, C. J., & Kuhnert, K. W. (1992). Integrating skill acquisition and perspective taking capacity in the development of leaders. | "stepping back from the leader–follower exchange to obtain a perspective on the basic values underlying the exchange." (p. 340) | Perspective-taking requires both general and specific cognitive skills which have both distal motivational processes (PT capacity) and proximal motivational processes (ongoing application of PT capacity). Furthermore, PT also comprises of three phases of skill acquisition (knowledge acquisition, knowledge compilation, and procedural knowledge). |
| Škerlavaj, M., Connelly, C. E., Cerne, M., & Dysvik, A. (2018). Tell me if you can: Time pressure, prosocial motivation, perspective taking, and knowledge hiding. | "having a broader scope of what is important for the total organization and needed for prioritizing others' needs." (p. 1495) | "Perspective-taking may be encouraged by providing employees with the opportunity to discover some personal information about coworkers such as accomplishments and personal interests. Frequent social interactions increase familiarity amongst employees, which encourages PT, and which would, in turn, reduce knowledge hiding." (p. 1503) |
| Wolgast, A., Tandler, N., Harrison, L., & Umlauft, S. (2020). Adults' dispositional and situational perspective-taking: A systematic review. | "PT is a cognitive capacity related to mentalizing that helps individuals regulate their emotions and make appropriate responses in a social situation." (p. 377) | "moving into a position with a similar visuo-spatial perspective like a target person's perspective may facilitate situational social PT compared to staying in front of that person." (p. 378) |

## RESULTS

Given the broadness of the three categorical research themes, this section is shaped around journal articles that I consider to be a direct progression from previous ground-breaking studies regarding PT. Firstly, and to outline the development of this systematic review, it was necessary to find pioneering but distinct bodies of research. This includes the emotional reconfiguration theme developed from works such as Johnson (1975) and Leith and Baumeister (1998). For Johnson (1975), one's ability to co-operate with others is significantly related to one's capability in affective PT. However, the limitations of this study indicate that there is no sufficient evidence to provide the general direction of the relationship between variables. In Leith and Baumeister's (1998) work, the trait of guilt-proneness (a facet of conscientiousness and knowing when one has violated a rule or principle) was found to lead to greater PT. These previous studies have paved the way in understanding the multifarious causes underpinning PT, particularly shedding light on how it is strongly associated with empathy and prosocial behaviour, and acts as a function that overlaps with other emotional modalities such as emotional regulation.

Secondly, the cognitive reconstitution theme stems from Marsh et al.'s (1981) study and Davis's (1980) seminal work which suggests that PT can also be understood from individual and meso-level theory approaches. Marsh et al. (1981) observe that social and affective dimensions of PT are strongly correlated with how individuals solve abstract/conceptual problems, interpersonal issues and role-taking tasks. Perspective-taking assists us to relate to strangers (unfamiliar individuals) by acknowledging that our own characteristics (self-descriptors) can also be applied in understanding unfamiliar individuals. Consequently, this brings about a greater overlap (familiarity) between how we cognitively represent ourselves as well as others. In summary, the cognitive-reconstitution stream implies that PT acts as heuristic and problem-solving reconfiguration. These reconfigurations can also be further understood by taking into consideration PT's association with sense-making and meaning-making.

Lastly, social and organisational familiarisation is based on the pioneering work of Boland and Tenkasi (1995), who argued that language and communication within the sphere of complex social systems contribute to how PT and perspective-making (PM) occur in knowledge-intensive firms. This approach is a consolidation of extant research on PT that emphasises its operationalisation as an inherent social process and a socio-linguistic practice. Moreover, this research stream accounts for the diversity of theories within management science and social psychology. The three theories within this research stream contain Freeman's (1999) Stakeholder Theory (emphasising the importance of stakeholders and their perspectives on ethics, values, goals and needs), Tajfel and Turner's (1986) Social Identity Theory (emphasising how self-concept developed from social membership shapes our perspectives, which in turn influence intergroup behaviours), and lastly Cohen and Levinthal's (1990) Model of Absorptive Capacity (emphasising how firms learn from new information through assimilation, integration and application). Cohen and Levinthal's model was utilised by Litchfield and Gentry (2010), who promoted the term 'organisational perspective-taking' and defined it as a crucial aspect of absorptive capacity.

All in all, the three categorical research themes contribute to a unique grasp of PT. On one hand, it can be viewed as being relatively consistent and stable and may be directly tied to the individual's 'personality,' which encompasses values, work experiences, relational experiences, rituals, skillsets and memories. On the other hand, it can also be viewed as dynamic, modified by the external environment, market reality, conflicting individual personalities within the firm, and other various workplace constraints. Although the studies illustrated above are far from exhaustive, they are sufficiently comprehensive in identifying important intersections that emphasise a common ground that runs across all three templates – how PT processes shape cognition, emotion and interpersonal/social capabilities within firms. While the three thematic templates are consistent and represent independent fields of research, it is also quintessential to understand their key overlaps as well as opposing viewpoints in order to build a rigorous, integrative and original framework that will be theoretically sound.

## Emotional reconfiguration

The first theme, emotional reconfiguration, calls into mind that PT is not just a cognitive process but also an emotional one. In this regard, individual differences associated with emotions and emotional capacity can shape PT.

I identify three constructs that are related to this theme: emotional contagion, emotional regulation and empathic accuracy. Emotional contagion is defined as the phenomenon of having a person's emotions elicit similar emotional responses in other people (Hatfield et al., 1993). In management literature, the construct of emotional contagion has been investigated in terms of how employees' display of emotion directly influences customer affect (Pugh, 2001) and also how managers/leaders can impact the mood of their group members (Sy et al., 2005). Pugh's (2001) study specifically focused on the antecedents as well as consequences of displayed emotion in organisations. The results suggest that personality characteristics of employees, combined with situational factors, are excellent predictors of displayed emotions as well as customers' affective responses. In a similar vein, Sy et al. (2005) found that leaders who consistently displayed positive affect and mood elicited greater team co-ordination and spent less on resources compared to groups with leaders who had negative mood. In sum, Hatfield et al. (2014, p. 171), in their review of classic and contemporary research on emotional contagion, assert the clear evidence that if participants are attentive, emotional stimuli can spark "mimicry, feedback and contagion."

The second construct, emotional regulation, refers to one's ability to regulate one's emotions in response to negative and positive experiences in such a way that consequent behaviours are socially tolerable, flexible and acceptable (Coté, 2005). Evidence has shown, in the organisation context, that the emotional regulation of leaders and members are distinct (Bono et al., 2007); that emotional regulation expends resources, especially when the work role requires the display of positive expressions; and that roles that expose individuals (physicians, police, nurses, emergency workers, counsellors) to people experiencing pain may elicit inhibiting emotional regulatory mechanisms to buffer against adverse consequences of frequent exposure to pain (burnout, compassion fatigue, etc.) (Decety et al., 2010). Overall findings from studies of emotional regulation establish that it has a strong relationship with PT, ostensibly due to how emotional regulation can either prevent PT, such as being in a job that dulls one's sensitivity to pain (the healthcare industry), or inhibit it through roles that demand continuous and strenuous emotional labour (customer service, call centres, collection officers, retail, service industry, etc.).

The last construct, empathic accuracy, refers to one's skill in accurately recognising, processing and evaluating different emotional states within oneself and also in others (Ickes, 1993). Investigations of empathic accuracy have generally studied how different types of communication may influence levels of empathic accuracy (Kraus, 2017); how cognitive deficits (or cognitive surplus) affect empathic accuracy (Bartz et al., 2010); and how situational factors constrain an individual's affective resources, which may also inadvertently decrease empathic accuracy (Bartz et al., 2010). In sum, the relevance of all three constructs related to the theme of emotional reconfiguration assert the strong affective dimension that subsists within PT. Emotional reconfiguration, to reiterate, simply means that moods, emotions and affect have a direct and robust linkage with PT, particularly as different 'affective states' may be more beneficial in inducing it than others – positive affect that increases oxytocin may increase likelihood of genuine emphatic concern. The emotional-reconfiguration theme also contains a massive body of literature and I highlight only some studies here to show current findings that can help provide context for PT.

## Cognitive reconstitution

The second theme, cognitive reconstitution, refers to the overall cognitive constructs that are associated with PT. Similar to the theme of emotional reconfiguration, this draws from an immense stream of literature – although the majority of the studies have been quantitative rather than qualitative. Cognitive reconstitution literally means the act of rebuilding cognition after an event. When an individual engages in PT, they are essentially rebuilding cognitive processes from prior elements or from new elements. This is similar to Aaron Beck's concept of 'cognitive restructuring,' whose main goal is to teach individuals how to identify maladaptive thoughts and transform them into more productive and positive ones (Beck, 1991). Cognitive reconstitution, nevertheless, represents a broader dimension as it incorporates the fundamental ability of the individual in 'reconstituting' cognition simply by putting them in positions different from their own. I discuss three constructs within the cognitive reconstitution theme: cognitive complexity, cognitive closeness and cognitive capacity.

The first construct, cognitive complexity, refers to an individual's "ability to perceive, differentiate and integrate information" (Ku et al., 2015, p. 83), and further, from an organisational viewpoint, cognitive complexity also refers

to how employees see their role in the context of the greater goals of the organisation. Other organisational scholars such as Van Hiel and Mervielde (2003, p. 781) define cognitive complexity as the careful assessment of "all the relevant perspectives on an issue and then [integrating] them into a coherent position." Their definition, however, highlights a more pragmatic approach as one's ability to use various theories in order to make sense of information. Current research on cognitive complexity has found its strong relationship with a similar psychological construct, integrative complexity, which is defined as the degree an individual identifies and integrates multiple perspectives, possibilities, contingencies, interdependencies, conflicts and frameworks (Graf-Vlachy et al., 2017; Moore & Tenbrunsel, 2014; Park & DeShon, 2018). Current research into cognitive complexity has also shown that simply more 'complexity' does not necessarily mean better outcomes. For instance, Moore and Tenbrunsel (2014) call into question the adage that 'more thinking' necessarily leads to better ethical choices. Across three experiments, the authors found that a curvilinear pattern exists in the relationship between cognitive complexity and decision outcomes. Utilising two distinct moral decisions while measuring levels of cognitive complexity, the authors observed that both low and high levels produced decisions that were less moral compared to reasoning within average levels of cognitive complexity. Simply put, overthinking a particular problem may produce greater undesirable outcomes, such as missing the right time to solve an organisational issue, or possibly failing to come to a decision in regard to an ethical dilemma. In a practical study of cognitive complexity from a leadership perspective, Graf-Vlachy and colleagues (2017) investigated the cognitive complexity of chief executive officers and argued that cognitive complexity should also be conceptualised as a 'quasi-trait,' particularly as it involves high substantial intra-individual variances and partial persistence, dependent on contextual factors. The authors have found that as executive job pressures increase, CEOs tend to cognitively simplify (Graf-Vlachy et al., 2017). The implications of their study suggest that overwhelming complex information, with numerous details, may sometimes lead to oversimplification, inadvertently drawing conclusions which are overgeneralised. Langley (1995) likens this to 'analysis by paralysis,' which is defined by an unhealthy obsession to rule-based thinking and logical analyses. Langley (1995) would also agree with Moore and Tenbrunsel (2014) that in order to keep a fine balance between too much thinking and not enough thinking, adequate consideration must be given to equipping the organisation with checks and balances in order to achieve rational and efficient decision-making.

The second construct, cognitive closeness, refers to a sense of psychological intimacy that results from a perception of closeness to another (romantic partner, close friend, family, etc.), which may also accompany feelings of being understood, accepted and cared for (Mashek & Aron, 2004). Consequently, high levels of cognitive closeness predict greater likelihood of being understood and accepted, while low levels of cognitive closeness predict high likelihood of being misunderstood and rejected (Polimeni et al., 2002). Cognitive closeness has also been examined from a cultural grounding perspective (Adams et al., 2004). Cognitive closeness, from a cultural grounding perspective, states that there are dual etic and emic definitions that one must be aware of. The etic definition refers to more general, non-structural and objective aspects of closeness. For instance, Andersen's Cognitive Valence Theory (CVT) – which describes the 'what' and the 'how' of intimacy exchanges between couples, family members, close friends and acquaintances – ascribes an etic approach to closeness as the theoretical framework assuming that intimacy exchanges are by and large global, categorical and identifiable (Andersen, 1998). On the other hand, an emic definition refers to a more local, context-specific and subjective trait. Applied to cognitive closeness, an emic approach assumes that cultural dynamics play an integral part in closeness. In Asian and African cultural settings, the concept of closeness may indicate stronger familial connections compared to a Western conceptualisation. Thus, "a cultural perspective suggests that the prominent concern with closeness and intimacy is ultimately grounded (rather than at odds with) in independent constructions of the self" (Adams et al., 2004, p. 331).

The last construct, cognitive capacity, refers to the general capacity (amount) the mind can retain at any given moment (Chiesi et al., 2011; Reinhard & Sporer, 2008). It is assumed to be finite as it is influenced by constraints such as age, gender and level of education. The importance of cognitive capacity and its relationship to PT hinges on the idea that PT requires basic cognitive processes such as attention and memory. Without these, individuals would be unable to assess what type of social information should be paid attention to and what should be discarded. When individuals are 'overloaded' with different information, their PT can be affected as they may be unable to see others' perspective. Furthermore, when cognitive capacity is overloaded, learning may become obstructed.

In this case, cognitive load refers to the total amount of cognitive and mental resources utilised by one's working memory (part of short-term memory responsible for immediate conscious perceptual and linguistic processing) in order to complete various tasks. Reinhard and Sporer (2008) investigated cognitive capacity by demonstrating the usefulness of dual-process models in the attribution of credibility. In the dual-process model, it was hypothesised that only high-task involvement and high-cognitive capacity lead to intensive processing of both verbal and nonverbal information (Reinhard & Sporer, 2008). The authors found that low-task involvement predicted the influence of nonverbal behaviour while high-task involvement predicted the usage of verbal information. This implies that levels of cognitive capacity, whether high or low, can influence the type of information chosen. That is, individuals who demonstrate high-cognitive capacity were able to utilise verbal information (a more complex form of information) in contrast to individuals with low-cognitive capacity who preferred to use nonverbal information.

In sum, the cognitive reconstitution theme within PT is commonly encountered (cf. Ku et al., 2015; Litchfield & Gentry, 2010). The availability of empirical evidence within this theme confirms the role of the cognitive dimension of PT. While there may be other related constructs of cognition important to PT, I specifically outline three here which are salient and well represented in PT literature: cognitive complexity, cognitive closeness, and cognitive capacity, identified as important to PT due to their validity, and their function in shaping and giving it meaning. Empirical studies investigating these constructs are consistent with the theory that PT is dependent on: (a) an individual's ability to perceive, differentiate and integrate information; (b) an individual's perception of social closeness to others; and (c) an individual's mental capacity to hold information at any given moment. Taken together, these studies provide a solid foundation in understanding PT from a cognitive approach.

## Social and organisational familiarisation

The social and organisational familiarisation theme envisions the idea that PT is comprised of linguistic, social-practice and communication capabilities that operate as a coherent system that affects organisational decision-making and collective processes. Based on the work of Boland and Tenkasi (1995, p. 6), the theme of social and organisational familiarisation presents PT as dependent on "models of language, communication and cognition" that are portrayed as linguistic games among individual agents and passed through conduits within the organisational system. Three constructs were identified as relevant in shaping this particular research stream: interpersonal influence, role-taking, and role-making.

First, the construct of interpersonal influence refers to an individual's implicit understanding of beliefs related to oneself (self-concept, self-esteem, etc.) and how these beliefs affect others (Ames et al., 2012; Stern & Westphal, 2010). This type of influence is then utilised to either reinforce (encourage) or punish (discourage) social behaviours. This construct is of particular importance to PT as it illustrates the fundamental social aspect of taking others' perspectives and whether or not these will be socially advantageous or disadvantageous for the perspective-taker. Simply put, PT is not just an intrapsychic cognitive process but rather an intra- and interpersonal process that develops over time and over social experiences. For instance, early work on the effects of interpersonal influence found that differences in group communication (inclusive vs exclusive) demonstrated different reactions to disagreement. In an inclusive group, dissenters are able to argue for their perspectives but are still considered to be a part of the group. On the other hand, communication with dissenters in an exclusive group diminishes, which leads to further ostracism (Schachter, 1951). Schacter's work was further refined and developed by Selman and Johnson in 1975. To Selman (1975, p. 36), the phenomenon of PT should also be understood as a function of basic social-cognitive processes that give "rise of reflective modes of emotional sentiments" and are "a function of the emerging cognitive construction of the nature and relation of self and other." In short, "a reflective self comes about through the separation of views of self and other and this in turn leads to new forms of empathic understanding" (Selman, 1975, p. 36). Johnson's (1975) work also echoes this understanding, particularly as his study found that a strong relationship exists between one's co-operative predisposition and one's ability to take others' emotional perspectives (feel what others are feeling). Co-operativeness also implies knowing that one's behaviour can be misconstrued by others and, through co-operation, subsequent behaviours may be tailored to minimise conflict. Leith and Baumeister (1998) built on this work and examined how guilt – an emotion that occurs

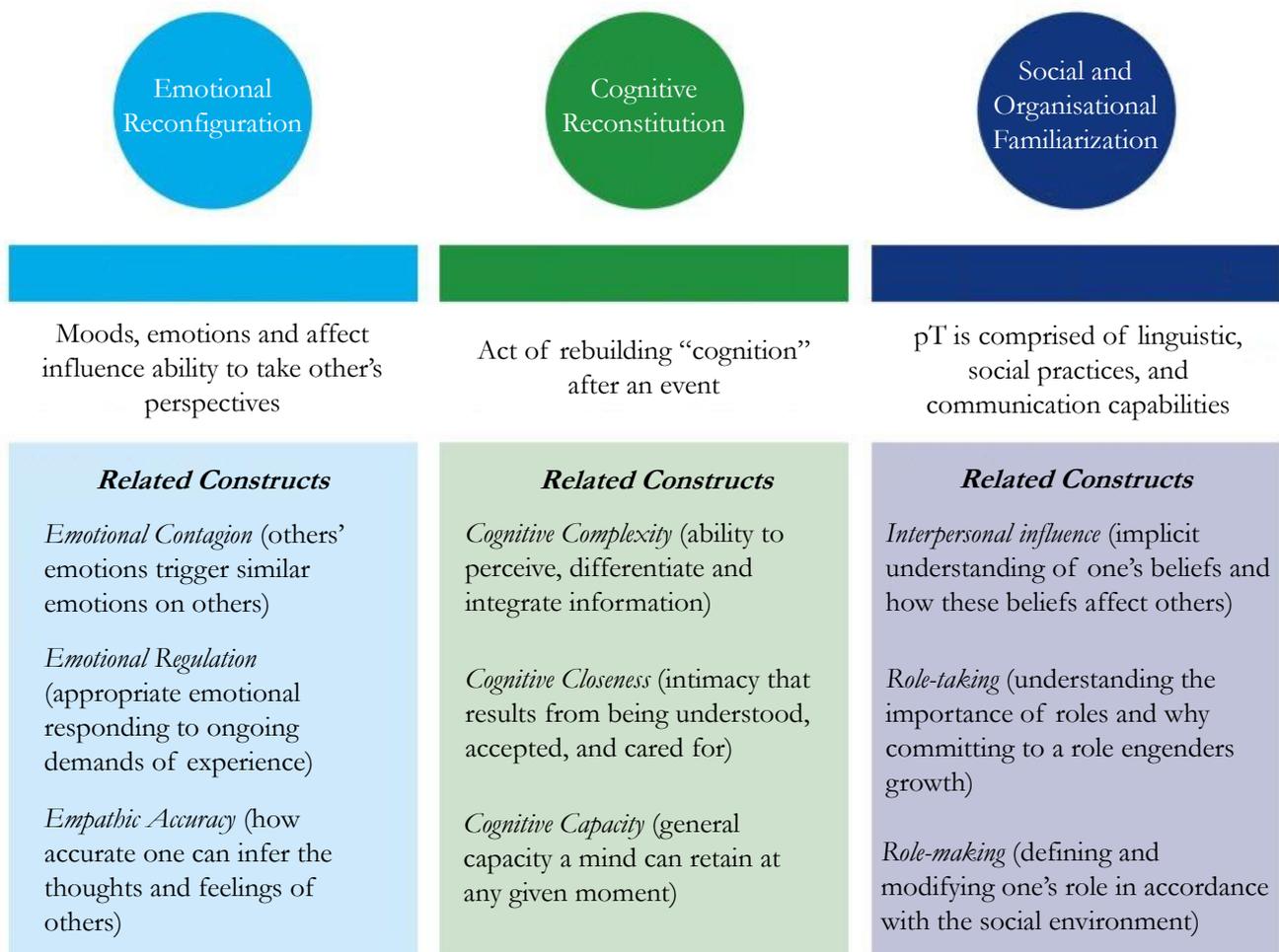| Emotional Reconfiguration | Cognitive Reconstitution | Social and Organisational Familiarization |
|---|---|---|
| Moods, emotions and affect influence ability to take other's perspectives | Act of rebuilding "cognition" after an event | pT is comprised of linguistic, social practices, and communication capabilities |
| **Related Constructs** | **Related Constructs** | **Related Constructs** |
| *Emotional Contagion* (others' emotions trigger similar emotions on others)<br><br>*Emotional Regulation* (appropriate emotional responding to ongoing demands of experience)<br><br>*Empathic Accuracy* (how accurate one can infer the thoughts and feelings of others) | *Cognitive Complexity* (ability to perceive, differentiate and integrate information)<br><br>*Cognitive Closeness* (intimacy that results from being understood, accepted, and cared for)<br><br>*Cognitive Capacity* (general capacity a mind can retain at any given moment) | *Interpersonal influence* (implicit understanding of one's beliefs and how these beliefs affect others)<br><br>*Role-taking* (understanding the importance of roles and why committing to a role engenders growth)<br><br>*Role-making* (defining and modifying one's role in accordance with the social environment) |

Figure 1. Theoretical framework of organisational perspective-taking.

when a person feels that they have violated a moral and social standard – affected interpersonal relationships. Their experimental studies found that while shame can harm relationship outcomes, guilt can actually improve interpersonal relationships because it implies an awareness that one's behaviour has affected others. In view of all that has been mentioned thus far, the construct of interpersonal influence illustrates the important social aspect of PT and why it is integral to study in the context of relationships, since the inclusion of oneself within a dyad, group and organisation is based on interpersonal processes.

The second and third constructs, role-taking and role-making, are also important for PT. It is no coincidence that both these constructs are important phases (stages) in LMX theory. While these phases are well established in LMX literature (Graen & Scandura, 1987; Graen & Uhl-Bien, 1995), I further delineate each construct in the context of PT and socialisation. Fundamentally, roles refer to a cluster of rights, obligations, protocols, responsibilities and duties that are intrinsic within a specific social position (e.g., neurosurgeon, criminal lawyer, federal judge) (Morrison, 1994; Selman & Damon, 1975). In role-taking, individuals are assumed to 'take on others' perspectives' in part due to general cognitive growth as well as a growing realisation that others' perspectives may vary greatly from one's own (cf. Selman, 1980; Selman & Byrne, 1974). For example, children's ability to understand the roles of their parents (as father, mother, job roles, etc.) may be somewhat limited due to immature cognitive growth. Nevertheless, with time and experience, children, if given proper social support, may grow to understand others' cognition and emotions as they switch to different roles of being a son or daughter, a student, an employee, a friend, or mentor. Selman's role-taking has also been categorised into different stages: (a) egocentric role-taking; (b) subjective role-taking; (c) self-reflective role-taking; (d) mutual role-taking; and (e) societal role-taking. These stages have had a great influence on the phases of leader–member exchange, particularly as both stages (LMX and Selman's role-taking theory) describe

how individuals, or relationships, develop due to congruencies in values, socio-cognitive competencies and socio-emotional resources.

In role-making, individuals are assumed to be in the process of defining and modifying one's role in accordance to social, contextual, relational and organisational cues (Sluss et al., 2010). Furthermore, it can be postulated that role-making is also a self-conscious activity. That is, an individual becomes aware that a role exists (outside of his/her awareness) and that this role may require specific mental, behavioural and emotional processes they may choose to engage in. Role-making is strongly associated with PT, as taking on others' perspectives requires an awareness that specific roles exist that require mental and emotional transformations. For instance, Bal and Veltkamp (2013) examined how the act of reading fiction elicits changes in empathy and PT among readers. In this regard, reading fiction puts the reader in a 'role-making' mindset that consequently shapes levels of empathy for the reader. In a similar vein and from an organisational viewpoint, Sluss et al. (2010, p. 517) explain that role-making "takes shape as individuals form perceptions of their work role based on role preference, role ability, and expectations of others – with an ongoing assessment and subsequent modifications occurring as social cues and individual inclinations converge (or diverge)." As a theme, social and organisational familiarisation has made substantial strides in improving our understanding of PT as well as PM. It is apparent that behaviours associated with PT are composed of linguistic, social and communication practices that directly link it with relationships. While I acknowledge that there may be other constructs that are not included here, three key constructs (interpersonal influence, role-taking and role-making) emerge as salient elements that transpire in the literature.

## LIMITATIONS AND FUTURE RESEARCH

This systematic review is not meant to be exhaustive and therefore has some limitations. I acknowledge that the theoretical framework proposed shares the individual-level assumptions of relationships at work – that individuals interact with each other from a stance of reciprocity, in contrast to the reality of organisational roles comprising of unequal levels of power. Applied in organisations, reciprocity may not always be a given due to differing cultural dynamics and prior embedded organisational practices. Consequently, it is beyond the scope of this article to forecast meso-level to macro-level outcomes associated with PT. While it may seem intuitive that more organisational PT would be generally better for leaders, employees, and to some extent customers, PT comes with affective, cognitive and essential psycho-physiological costs that may only be temporarily optimal. The focus of my review is on organisational PT as a dynamic process and includes both basic and applied research conducted in a range of disciplines. In order to keep the scope of the review manageable, I have chosen to focus on the key themes of the organisational perspective-taking (OPT) process rather than including its numerable outcomes such as organisational citizenship behaviour and job performance (individual level, team level, and firm level). For this reason, studies examining OCB and job performance were intentionally left out as they would fall outside the scope of the systematic review.

The other side of the coin, according to this systematic review, is the need for PT's theoretically underexamined equal: PM. Boland and Tenkasi (1995, p. 351) view PM as PT's important equal: "communication that strengthens the unique knowledge of a community" and requires a nurturing of communities' unique characteristics, in-depth knowledge, and distinctive specialties. Future research can more rigorously scrutinise the nature of PM. For instance, how can knowledge creation within organisations be utilised as strategic dynamic capabilities required for integrating what transpires from experientially-based organisational practices to knowledge-oriented practices, and vice versa? Furthermore, scholars can also explore the fundamental relationship between PT and PM, especially in understanding the dual effects of these constructs on the individual, on the team, and on the organisation as a whole (Boland & Tenkasi, 1995). When does an organisation know when to engage in PM or in PT? In follow-up to the question "How do leaders model and develop both capabilities while maintaining positive relational and organisational goals?", future research can also investigate whether relying on PT or PM by individuals is an important factor for knowledge management in organisations, and whether exploring the extent PT or PM facilitates or hinders the experiential learning process that occurs in organisations. I theorise that organisations who prioritise experiential learning processes are better able to balance PT and PM organisational practices and thus

better able to respond to dynamic volatile environments. Finally, this paper can provide guidance to organisations by emphasising the relevance of PT to knowledge management and organisational learning. The findings of this systematic review show both tangible and intangible benefits from engaging in PT, especially in facilitating interaction between departments, divisions, cross-functional teams, and stakeholder groups.

## CONCLUSION

This systematic review advances important insights to social-exchange theory. Specifically, it offers a better understanding of the complexity of PT and its relationship to social-exchange theory. The implications for organisations are salient because every employee, leader, supervisor and actor within the organisation is intrinsically engaged in an ongoing social-exchange relationship. Although PT has been extensively studied in social psychology and in leadership studies (Ku et al., 2015; Litchfield & Gentry, 2010; Longmire & Harrison, 2018), its relationship to the content and form of social-exchange relationships has not been examined in much detail. The three themes found here illustrate the foundational concepts within PT literature from an SET approach, and understand it not just as an intra-individual resource but also as a fundamental social practice. This outlook is consistent with prior theoretical models which indicate that engaging in PT facilitates reciprocity in social relationships, meaning that actors within the relationship are able to reduce disadvantages stemming from competition and increase benefits derived from collaboration (Cortez & Johnston, 2020; Cropanzano & Mitchell, 2005; Settoon et al., 1996). Furthermore, this review advances social-exchange theory by calling attention to the socio-emotional dimensions of PT as an underexamined influence on processes undergirding it. In exploring how PT may influence organisational performance, researchers have traditionally focused on the individual-level features of PT within organisational contexts, such as team creativity (Hoever et al., 2012) and business negotiations (Trötschel et al., 2011). This systematic review complements these approaches by accentuating the significance of affective cues, cognitive processes, and socio-organisational practices that trigger PT in shaping consequent work performance.

Essentially, PT can be comprehended as an archetypal theory of socio-emotional competency that has far-ranging applications for organisations and management. As such, organisations will need to look beyond traditional strategies for leadership development and talent management in order to empower all organisational-level actors; leaders, members, and other stakeholders, in moving the company forward. Simply put, callous and unempathetic leaders are expensive, costing companies millions of dollars yearly both directly and indirectly. Remarkably, these managers make up at least 45–50% of today's management pool (Litchfield & Gentry, 2010) due to the strong propensity of organisations to value cost-containment strategies in contrast to relational-investment strategies, which differ dramatically in terms of priorities and focus. With such high and important stakes, particularly in light of the new normal, it is imperative that HR professionals as well as organisational leaders consider pursuing avenues for leadership development. Perspective-taking is one of these legitimate avenues and is unexpectedly fundamental yet remains partly untapped.

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