WELCOME TO THE MATRIX
A TALE OF TWO PARTNERS

FOR Nancy, it truly was the best of times and the worst of times. In describing the wealth of corporate resources she needed to work through to get her job done, Nancy stated bluntly, "There was one relationship in this corporate maze that really worked, one that was a complete roadblock and the rest were various shades of roadblock."

Nancy was in a matrix role, specifically what I call a Customer Hub Matrix. She was an HR person who relied on various centralized, corporate shared-service organizations to bring services and products to her internal customers. Nancy supported Manufacturing, which was not only geographically remote, but seemingly a world away from the culture at corporate headquarters. An idea that made perfect sense for 4,000 people at Corporate in suburban LA made no sense whatsoever to a plant of 600 in rural Mississippi. Nancy was a traffic cop at the intersection of local needs and corporate goals.

She had five different corporate areas in her hub. Two of these provide a great illustration of the good and bad of matrix relationships. Sharon was Nancy's partner for delivering Employee Benefits to her internal customers. Fran was her partner for delivering HR information systems. The two partnerships could not have been more different.

Fran headed a group that was responsible for all HR information systems (HRIT). At the time, Fran and Nancy were both on a team charged with

design and installation of new HR and Payroll systems. Nancy also connected with Fran and her team on a daily basis to sort out more routine systems issues and projects. At first, things were smooth, and they had a few accomplishments, both for the corporate team and for the manufacturing plants. But as time went on and the stakes got higher, Nancy grew increasingly frustrated by "how to get them to provide services to my business in a way that meets Manufacturing's needs and expectations…they couldn't customize anything, had really long lead time, they just didn't get it. It was like we were operating in totally different universes."

Any connected tasks were complicated by near-constant perceptions of trespassing onto each other's "turf." Decision-making provided regular controversy over who the decision maker was, what decisions they needed to make together and what decisions they needed to give the other a heads up on. They rarely agreed on tactics, let alone bigger picture goals. It became a classic "throw it over the fence" relationship. HRIT would make a decision or create a solution and pass it over. When Nancy was asked for input on a decision or solution and provided it, she was met with, "We can't do it that way; we aren't going to customize for one group of employees." According to Nancy, "They had one way of doing things, and there was absolutely no flexibility on that. The rules and regulations were black and white, rarely any flexibility."

"As more managers gain experience operating in matrix organizations, they are bound to spread this experience. We believe that in the future matrix organizations managers will speak less of the difficulties and pathologies than of its advantages and benefits."

HARVARD BUSINESS REVIEW, 1978

After several rounds of this, Nancy stopped giving input, and they stopped asking for it. Nancy did the bare basics to implement their work products and jerry-rigged things behind the scenes. The silos were built and reinforced with every interaction. The amount of energy consumed in silo building and the hours consumed in work-arounds were significant. The divide wasn't just between Nancy and Fran, but between individuals on their teams as well. The rift was ongoing and obvious.

Communication became more and more constricted as Nancy and Fran's trust unraveled. Doling out answers to only the questions that were asked, sharing only what was absolutely necessary. Nancy described meetings as "one pack against another." At one point, a meeting that was supposed to include a total of five people representing both teams grew to 10+. There was standing room only, both teams congregating on their side of the room. Given the

nature of the discussion in the meeting, it was an apparent attempt to overrule by outnumbering—on both sides.

After relaying this story to me, Nancy paused and said, "It's actually my big regret—that I didn't try harder or try a different way to make that relationship work. Surely there was something I could have done?"

She then proceeded to tell me about Sharon. Sharon was on the opposite end of the partnership spectrum. When Sharon joined the company, Nancy saw an opportunity for a fresh start with a person who she would need to work closely with. Sharon's predecessor was a reasonable partner, but in Sharon, Nancy saw the chance to form an even stronger collaboration.

She started by initiating a visit to Sharon at corporate headquarters. Then she took Sharon to a couple of plants so she could get a feel for the manufacturing culture and realities. Determined to make this work, Nancy included Sharon and her team in her meetings, readily and routinely shared information and brought them in on planning and decision-making. At first Sharon's reciprocation was scant, but it grew over time as Nancy persisted.

The partnership grew and sustained even through a few crises. "It was just so easy—there were none of the extra-curricular issues to deal

As I interviewed leaders for this book, I could tell the complexity of their matrix by the number of words it took to explain it.

The record? 462 words.

with like there were with Fran and her team. It was smooth, even when times were rough." Nancy found herself far less frustrated by the fact that corporate couldn't always give her what she needed—she was willing to give and take, choose her battles. Even when decisions and solutions didn't meet 100% of Manufacturing's needs, Nancy and her team worked to implement them.

Nancy's relationship with Sharon spread to her team and her customers. Sharon's team enjoyed a unique place in the heart of the manufacturing team— the corporate team that really "gets it." In Nancy's words, "Once I had built the relationship, whether my expectations changed of what they could provide, or they provided better service, it just went a lot better. I could understand what they could really give me, where they had flexibility and where they didn't, and they understood the same from me and my business."

There are many reasons for the differences between these two partnerships—experiences and styles of the people involved, nature of the projects, even timing. These variables are not replicable, and while they might make an interesting read, the application is limited. But within this story also lie principles and practices that make matrix roles work. The partnerships that were formed, goals that were aligned (or misaligned), clarity of roles, communica-

tion and influence practices that were utilized apply in all sorts of matrix situations. So in answer to Nancy's question of whether she could have done things differently with Fran, the answer is yes. These techniques were identified in my surveys and interviews of over 100 experienced matrix managers and form the backbone of this book.

The other thing that carries over from this story is the complexity of the backdrop. The maze of people and cross-functional teams that Nancy worked through is typical of large corporations everywhere. Traditional structures and roles in which titles are descriptors of how work gets done are gone. They have been replaced by organizational mazes that are rarely self-explanatory.

HOW DID THINGS GET SO COMPLICATED?

"Matrix" organization structures first came into vogue in the 1960s as a way to organize around key projects in the burgeoning aerospace industry. Through the 70s and 80s, commercial industry picked up on the trend with mixed success. Organizational design researchers Larson and Gobeli (1987) provide a workable definition of a traditional matrix organization:

> *"A 'mixed' organizational form in which normal hierarchy is 'overlaid' by some form of lateral authority, influence or communication…there are usually two chains of command, one along functional lines and the other along project lines."*

Much has been written of project managers who sit at the crossroads between reporting through the project management structure and through their "business" boss as described above. *But the matrix isn't just for project managers anymore.* Informal matrices and matrixed teams are cropping up in organizations that don't call themselves "matrix organizations." This once formally named and managed structure has morphed into overlapping organizational webs that are often navigated with little or no guidance.

These webs are sprouting up as the traditional business structure of multiple, independently operated business units shifts to shared services, cross-functional teams and "flatter" organizations. All these efforts are aimed at doing more with less and gaining "economies of scale," and they all create matrices.

In addition, automation, globalization, regulation and legislation have created a reality in which few tasks, projects or goals fall neatly into one person or team's bailiwick. Instead they cut across teams, functions and geographies.

Problems stretch across multiple organizational territories, as do their solutions and the processes for reaching them. To manage these tasks and solve these problems, organizations began to form around them, formally and informally—through full-on teams or individual reporting relationships. These matrix structures are intended to maximize the power of intersections—intersections between global businesses and local resources, between technical expertise and business units and among multiple functions. Nancy, in the opening story, found herself at the dead center of a matrix between corporate shared services and her manufacturing internal customers.

There is undoubtedly power to be had at these intersections—tough, complex problems can be solved and multi-pronged strategies carried out here. But they can feel more like labyrinths than intersections to those attempting to navigate them.

WHY PEOPLE WORKING IN MATRIX ROLES DESPERATELY NEED A BOOK ABOUT IT

Matrix roles (and the challenges and frustrations that go with them) are everywhere. The field customer contact person who has to work through a maze of resources to write contracts, negotiate delivery and troubleshoot product issues. The product manager in Singapore who is simultaneously accountable for numbers in her country, region and business unit despite the fact they are in conflict. The HR person who reports to a globalized HR function, with a dotted line to the head of the business he/she supports. All of these are matrix roles.

"The biggest mistake people make in matrix situations? Assuming they can't do anything about it."
EXECUTIVE COACH

When the matrix practitioners I connected with described their matrix roles they used words like confusing, chaotic, convoluted and frustrating. Operating in a web of authority, on multiple dimensions and sometimes at cross-purposes can be draining to even the most energetic matrix managers.

The matrix turns our traditional assumptions about hierarchy, power and authority upside down, blurring lines of authority that were once crystal clear. Job titles no longer bring with them everything needed to get the results that we are held accountable for. "Decision-maker" distinctions that used to be illustrated by title and office size are disappearing. Pinpointing who is in the catbird seat becomes less and less clear, and multiple customer groups with disparate needs tapping into the same pool of resources drown out the tradi-

tional cry of "the customer is always right."

You are probably nodding your head in agreement to the realities listed above. Getting results in matrix roles is as different from traditional roles as basketball is from swimming. Different rules apply; different skills are needed. But when we are in the middle of these matrix intersections, we often try to apply the same traditional approaches to getting things done. It's like trying to dribble a basketball in four feet of water.

Matrix mastery is becoming a distinguishing competency at every level of organizations. The skills clustered around matrix management represent the very definition of what it means to lead in modern organizations. Attempts to job-hop yourself away from matrix roles are a wasted effort. You have to hone your proficiency and make your skills and practices portable—corporate reorgs, mergers, acquisitions and job changes all require you to pick up and establish yourself anew as a matrix manager. This book will be a resource for you in current and future matrix roles.

There are ways to gain traction and be successful in these roles. It's not "just the way it is." There are specific skills and practices you can apply to get things done. Through surveys and interviews, experienced matrix practitioners weigh in on these in the chapters that follow.

IT'S NOT ABOUT THE BOXES

Researchers and authors have done considerable work examining the optimal dimensions of a matrix, structure and strategy alignment, how to implement a matrix structure, etc. Organizations frequently look to reshuffle the deck and consider how they can reorganize the matrix for better results.

The architecture of matrix structures is important—like a house built on a faulty foundation, no amount of individual skill or diligence will keep an illogical, nonsensical structure standing. But the fact is, although matrix structures start as boxes on paper, they rely on people to work. Where this book picks up is what happens *after the boxes are laid out.* It's about the partnerships, the end game of these partnerships and the skills that get you there.

WHAT TYPE OF MATRIX ROLE ARE YOU IN?

Matrix roles are set up to enable organizations to get the best of both worlds. An organization wants global oversight and local autonomy so they set up a dotted line reporting relationship across geographies, connecting the goals of the global corporation and the local team. They want to support business

units without recreating support teams all over the company, so shared service teams are created, bringing the competing priorities and goals of business units to the desks of the team members. To ensure that product design teams stay connected with the business and the customer, team members report to the Project Lead and to their business. To solve a problem that cuts across multiple functions with a solution that cuts across those same functions, they form cross-functional teams.

Let's get specific about your matrix role. Matrix roles can be seen above you (multiple bosses) and surrounding you (multiple, disparate stakeholders you depend on). Some of the most common matrixed roles are:

Formal project matrix: This is the most "traditional" and established form of matrix. It is defined as having a project management office structure and a functional or business reporting structure. These roles are very common for long-term projects like product development. People are generally 100% allocated to these projects/positions. The idea behind this is to establish dedicated resources that utilize structured project management, but are still held accountable to the function or business that owns the final product.

> *"I am an engineer on a product development project. On the 'official' org chart, I report to the Engineering Department Head. In reality I spend 80% of my time and get 80% of my work and direction from the project manager for a development team I am a part of—she's my 'dotted line' boss."*

Cross-functional team matrix: These have cropped up all over organizations as a way to solve problems and keep the business moving. They are generally for specific (and often short-term) projects/issues. The idea behind this type of matrix is that more minds = better problem identification and better solutions.

> *"I am the 'head' of a commercialization team for a product launch in Europe. My job is to design and execute a launch strategy that all country teams buy into."*

Reporting relationship matrix: This is most often seen as an outgrowth of globalization. Often, globalization includes centers of expertise that maximize the knowledge of specialists and maintain local offices to maximize proximity to customers and markets. So while a person (say

HR, Marketing, Finance) may report to a centralized head of their function or region, he or she may also have a solid or dotted line to a business or geography. This dual-reporting relationship is intended to ensure that the specialist doesn't operate in a vacuum, removed from those whom he/she supports.

> *"My boss is the VP of HR for Spain, but I work with the head of the business on a daily basis and also need to make sure that I am doing what the corporate HR team expects."*

Customer "hub" matrix: Companies often have dedicated customer teams whose sole purpose is to work together to meet the needs of specific internal and external customers. More and more, these teams are not fully dedicated to one customer or even customer group. Instead they are a "shared service" that supports a line of products or even an entire business. Nancy in the tale of two partners was in an internal customer hub, but they can be seen with external customers as well. It is left to the customer contact to orchestrate all that is needed to deliver on customer needs.

> *"I am the key customer contact for this territory. My company has six different divisions. My customers order products from all six divisions. Most of my job entails negotiating and executing contracts across these six divisions. I am all matrix—none of these people report to me."*

These four types of matrix roles may differ in how and why they are set up, but they have common challenges and require common underlying skills and practices.

WE KNOW IT WHEN WE SEE IT

It may have been easy to identify which matrix role best describes your own. Plotting a course for success in your role is a little trickier.

In his opinion for Jacobellis v. Ohio in 1964, Supreme Court Justice Potter Stewart said of the French film, *The Lovers*, "hard-core pornography is hard to define, but I know it when I see it … and the motion picture involved in this case is not that."

Matrix management is a little like that—you've probably seen people who navigate matrix roles and organizations well. They persevere where others have given up and flourish where others have faded. But "You either got it, or you don't" isn't exactly helpful if you are trying to improve your matrix management abilities.

If you have ever sought coaching on how to steer your way through a matrix role, chances are you met with blank stares or vague suggestions. Like many skills, people who are masters of the matrix may not be able to explain what they do or why they do it. Even leaders who are great coaches may struggle with helping to develop this one—so don't be surprised if even your highly successful boss isn't conversant on the topic.

That's because we haven't pinpointed what "good" (or preferably "great") looks like. The seven Essentials that make up this book are a start to naming what it takes to achieve results in matrix roles:

> You have to **Start with Partnerships**, which is *Essential #1*;
>
> Partnerships are forged to **Get Goals Aligned**, **Roles Clear,** and **Decisions Made**—which make up *Essentials #2, 3 and 4;*
>
> All of this requires you to: **Flex Your Influence Muscle, Communicate without Assumptions,** and **Treat Meetings like They Matter**—which are described in *Essentials #5, 6 and 7.*

Regardless of which matrix role best describes your current post, this is how you gain traction. The Essentials vary in importance and application based on the type of matrix role you are in, and these variances are outlined at the end of each chapter.

THE BUILDING BLOCKS

There are four common elements, or Building Blocks, woven throughout the book:

MINDSET   **JUJITSU**   **ZOOM OUT**   **TRIAGE**

You will see icons in each chapter that pull out ideas related to these elements in each chapter. They serve as an "at-a-glance" view of key tips and ideas.

MINDSET

Adjust your thinking and you are halfway to becoming a matrix master. In *The Seven Habits of Highly Effective People*, Stephen Covey does a great job of explaining how the way you think about something affects your actions and ultimately outcomes. He calls it the See-Do-Get Model. How you approach or see things will determine what you do, which in turn leads to your outcomes. If you want different outcomes, you need to start by changing how you view your situation—your mindset.

Trying any of the "how tos" that are part of the Essentials before adopting the right mindset will make your efforts disingenuous and limit your outcomes. Matrix roles differ from traditional roles in terms of clear lines of authority and responsibility, and they also require a different kind of thinking. If you are in a matrix role but retain the mindset of a traditional role, you will dramatically limit what you can accomplish because you will unintentionally create political rifts and disenfranchise co-workers. Your relationships will be too limited, your perspective too narrow and your solutions confined, rudimentary and unsophisticated.

JUJITSU

Jujitsu is a 2,500-year-old martial art that relies on redirecting the force of your opponent, thereby using his/her energy, not your own. Jujitsu is pertinent to matrix masters because conflict (though generally not hand-to-hand conflict!) is what matrix roles are set up to bring out. You can view this conflict as a battle and exhaust yourself fighting, or you can choose to *not* fight fire with fire. If you don't compete (for resources, decisions, control, etc.), your opponent can't win. Instead, try stepping away or disarming the conflict by giving or giving in. It may seem counter-intuitive and potentially counter to your organization's culture, but it is a powerful approach that leaves your reputation, values and strength intact.

ZOOM OUT

To succeed in a matrix, you must broaden your perspective. Maintaining a narrow, siloed focus on only your small segment of a project or organization will lead to failure. Matrix Masters must be able to see all the

pieces of the puzzle at once to figure out whom to involve, communicate with and influence. The traditional perspective of "I focus on this and this only" will only hurt you in a matrix role. Zooming out can be difficult because when we are overwhelmed or confused, our natural human tendency is to pull back and focus on whatever is right in front of us. These blinders may offer temporary relief, but not a sustainable solution.

TRIAGE

Triage is a medical term that refers to the process of efficiently prioritizing patients based on the severity of their condition when resources are insufficient to treat them all immediately. It comes from the French verb *trier*, meaning to separate, sort, sift or select. Sitting at an inter-section with a zoom-out mentality, you will see a lot: discussions that need to take place, decisions that need to be made, problems that need to be solved, conflicts that need to be resolved. But seeing them isn't the same as tackling them. To avoid being completely overwhelmed, you have to triage. I have worked with a number of Emergency Room physicians for whom triage is a way of life. Although the stakes are not quite as high in a matrix role, triage is still vital. You see a lot, and you are privy to things you wouldn't see in more traditional roles. But you can't take it all on—you have to triage.

CAVEAT EMPTOR

Although this book is focused on the people who make matrix roles work, clearly these roles do not exist in a vacuum. They are part of organizations and are affected by all elements of the organization.

Herein lies my dilemma: I want this book to empower you. I want you to move from "I surrender," to "Bring it on, I can do this." Too often we give up and resort to blaming the matrix for our lack of success. I want to loosen the handcuffs that we often create for ourselves. But let's be clear: *There are times when matrix roles, even when filled by a master of the skills and practices in this book, will not work. There are times when matrix roles are not set up to succeed.*

How do you know if your role is "not set up to succeed"? Consider the 6 Ps (because any business book worth its salt has a good alliteration): Pay, Power and Politics, Process and Policy, and Pedigree.

PAY. Incentive systems in organizations are a powerful pull. If that pull is not lined up with your direction, it is nearly impossible to change course. For example, if your cross-functional team is incentivized to focus on everything but your project, even if you execute the suggestions

in this book to the letter, you will not be able to overcome it. If your solid line boss is incentivized to drive results that conflict with those of your dotted line boss, again, you will not be able to find success easily.

POWER AND POLITICS. In some organizations, the culture is such that power is out of balance—business units have the voice and functions have no say, or there are fierce struggles for power between leaders at the top. Decisions may be centralized at the top, where nothing gets done without a title. To work, matrix organizations and roles must have some balance of power (though not necessarily 50/50), and decision-making rights must exist below the top floor. If not, your efforts in a matrix role may be beset by minefields that are difficult to anticipate and recover from and that can reduce risk-taking and initiative to near zero.

PROCESS AND POLICY. When formal processes for sharing information, making decisions or completing tasks are very hierarchical because they require multiple layers of approval, or when centralization causes a bottleneck, matrix roles can break down. Operating in matrix roles requires both individual and organizational flexibility.

PEDIGREE. Some organizations have widely held assumptions over who can influence decisions (which is an indisputable necessity for success in matrix roles). It may be a matter of experience. If you haven't carried the bag—been a sales rep—then you'll never influence the commercial side. If you've never worked in a plant, good luck influencing anyone on the manufacturing side. If you haven't worked in the industry, then your opinion is discounted. It may be where you grew up, organizationally speaking—what business, function, etc. You may eventually hold influence, but it will take an extended period of time.

My advice to you is to look at these caveats and judge them honestly. No organization has perfectly aligned incentives, a complete balance of power or policies and processes in place that support what you need to get done. You can't wait for or expect perfection, but you also can't expect to drive results when organizational barriers are insurmountable.

GETTING THE MOST OUT OF THIS BOOK

My goal for this book is that it becomes a resource that you turn to over and over again, that you bookmark, highlight and cover with post-its (at least for

those of you reading the good old-fashioned print version).

Throughout the book, we will circle back to Nancy and The Tale of Two Partnerships, but you will also see other stories and quotes from the 100+ leaders who were part of my research. Although I have changed their names and background information (to protect the innocent and guilty), their messages are loud and clear.

For the skimmers among you, each chapter is summarized with key concepts you need to **embrace** and ideas to **try**. In addition, there is a final word for each of the four types of matrix roles—so you can see what is especially important based on the nature of your matrix role.

Hundreds of tips and ideas are presented here. Some are new, some familiar, some simple reminders. Not all will be your style, and they will have to be adapted to your situation. Some you will read and think, "yeah, I tried that—it didn't work." When you find yourself with that thought, challenge yourself on two accounts: (1) What would it hurt to try it again? (2) The last time you tried it, did you have the right mindset? As I mentioned previously, trying tips without the right mindset will limit your results.

As with any resource, the real value is your personal commitment to trying things out and taking a risk. These tips may not work the first time, or you may feel clumsy. Give yourself a break and give others a break—it may take them some time to adjust to your new behaviors.