

# The Characteristics of Strong Organizations Relative to the Endurance Expedition

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## Abstract

The case study of Ernest Shackleton and his Endurance Expedition looks at various aspects of managing and leading organizations that any serious entrepreneurial CEOs and other business executives could borrow in starting and running their organizations. This paper looks at the characteristics of strong organizations that make them stand out strongly ahead of others, especially in competitive business environments. It is important to stay ahead of competition so that as organizations, we get the first mover advantage. The characteristics under discussion in this article are leadership, decision-making, people, work processes and culture. These made a difference in the Endurance Expedition and can surely make a difference to organizations operating in tough environments today.

**Keywords:** Endurance; leadership; decision-making; people; work processes and culture

## Introduction

Effective organizations achieve results and set targets and such organizations must exhibit strengths in five core organizational areas leadership, decision making and structure, people, work processes and systems and culture. These elements are interconnected and therefore, strength in one area offset by weakness in another does not appear to result in sustainable improvement hence all five elements must be strong enough to create a highly effective organization. The diagram below captures the interconnectivity between the five characteristics of a strong organization.



Source: Framework developed by Bain & Company and adapted by Bridgespan

Sir Ernest Henry Shackleton, a British explorer, was born in 1874. A school dropout at the age of 16, he joined the Merchant Marines at this young age to join the service at the time. In 1898, Shackleton became a qualified master and a sub-lieutenant in the Royal Naval Reserve in 1901. Yearning for adventure and fame, in 1901 he applied for a position in Robert Falcon Scott's Discovery expedition to the Antarctic. He is credited with having kept his team together—and alive—across the treacherous mission. The thrust of this paper is to discuss characteristics of strong organizations relative to Shackleton's Endurance Expedition with a significant focus on the core characteristics depicted on the diagram above. All the five core characteristics of strong organizations are discussed in turn hereunder, with the hope that organizations operating in turbulent organizations could draw some key management and leadership lessons from Ernest Shackleton and his Endurance Expedition.

### **Leadership**

In the case of Ernest Shackleton and the ability he demonstrated, it can be argued that he is a great leader with an essential manager's skill set. Cummings & Worley (2009) noted that leaders in organizations need to be role models, with a clear vision and plan to execute duties and demonstrate clarity of purpose to subordinates as was the case with Shackleton. The three key leadership traits exhibited by Shackleton include the ability to remain optimistic under difficult circumstances, he was highly motivated due to his love and passion for adventure, and being very observant of his team members enabling him to fully appreciate the strengths and weaknesses of each. From these brief points of view, all these traits are necessary components of making a great leader, and it has become the keys to many booming leadership stories in the business world that exist today.

Modern-day organizations can also make use of the Endurance voyage as a key to becoming more effective, by investing in management capabilities fostering a move to a place where the organization is not only strongly led, but also strongly managed. Drawing parallels with Shackleton, modern business leaders should strive to be self-confident, motivated, optimistic as well as have a great drive factor to influence employees.

### **Decision making and structure**

Once Shackleton realized that the Endurance was trapped in the ice, he resolved, despite his bitter disappointment, communicated matter-of-factly to his men that their goal had changed from crossing Antarctica to wintering over on the ice. The Antarctic weather presented for Shackleton and his man unpredictable circumstances which can be equated to business operating environments that are highly unpredictable due to both intrinsic and extrinsic factors. Shackleton knew exactly what would appeal to the type of person he wanted to accompany him; which were simply, men who were prepared to endure extreme hardship and who were not motivated financially but by the glory of achieving a goal, whatever that may be.

Alexander (1999) propounded that flexibility in decision-making is one key element of the Shackleton endurance voyage. After the team left Patience Camp they travelled in three lifeboats searching for land, which they hadn't seen in 15 months. During the 15-day journey, Shackleton changed the plan four times. The change was always because new information emerged and he had to adjust in order to meet the end goal. As such leaders should have been flexible in tactics to enable decision-making to change time and

allow for employees to adapt promptly to environmental changes. Similarly, when there is a potential threat to an organizational goal, there is a need for managers to make tough decisions for example at Sambisa Brands Ltd the company had to lay off 700 employees as a result of the threat posed by the Covid-19 pandemic on revenues and cost management.

Against that background, business leaders need to avoid the trap of being emotionally attached to a particular plan, no matter how much time they had spent devising it. Establishing and implementing a strong decision-making process is a complex endeavor, one that is hard to do as well. So it may be valuable to use a management tool specifically designed to help an organization's leaders unravel the decision-making process, clarify roles and responsibilities, and set clear expectations for decision making going forward. The process of using such a tool can help leaders get past preconceived notions of structure and more fully engage in a holistic approach to their organization.

### **People**

Sir Shackleton understood that in order to achieve his mission he needed to recruit the right people. According to Lansing (1959) in his words Shackleton said "The men selected must be qualified for the work, and they must also have the special qualifications required to meet polar conditions. They must be able to live together in harmony for long periods of time without outside communication and it must be remembered that the men whose desires lead them to the untrodden paths of the world have generally marked individuality. It was no easy matter for me to select staff." He knew that being the first to reach the Pole would have brought him everlasting fame and glory but to do so he needed a solid team behind him. Whilst Shackleton and his men were weakening, he knew that a final push to the Pole would put their lives in grave danger and decided to turn back. As strong as his desire to lead expeditions was, his sense of responsibility for his men was stronger. In addition to being a principled choice, this decision gave those who served under him on the Endurance confidence that their lives would not be cavalierly sacrificed to meet the expedition's goal.

Healthy companies know how to develop teams that collaborate to achieve common goals. Employees and managers readily offer their assistance to each other to meet corporate objectives. Key to the success of any organization or mission is its people. An effective team is the result of an effective selection process by an effective leader. Shackleton took the selection of his team extremely seriously. For example, his advertisement in the national press for volunteers. "Men wanted for hazardous journey. Low wages, bitter cold, long hours of complete darkness. Safe return doubtful. Honour and recognition in event of success." (Eisenhardt, 1999). Organizations need to clearly outline expectations, effectively draw key performance indicators, and have performance commitments stemming from the same.

### **Work processes and systems**

It must be noted that during the Endurance Voyage era, Shackleton and his men did not have the privilege of access to well-designed work processes and systems as does modern-day organizations. To help people work together more effectively across departments or groups it is important to start by identifying critical areas where such work takes place. Then narrow that list to the areas that link back to the organization's top priorities. Armed with this information, creating explicit linking mechanisms becomes a Shackleton emphasized results achieved through networking than hierarchy, hence the diversity of his crew. While

many matrixed organizations have aimed to reduce hierarchy by flattening organizational reporting lines, the results are mixed. If not careful, the effort can result in creating more silos rather than fewer. A commensurate build-out of so-called “networks” is a necessary step, establishing corporate communities of shared interests and project-based initiatives that reach beyond divisional responsibilities.

### **Culture**

According to Heacox (1999), Sir Shackleton established an organizational culture of adventurism and camaraderie on his expedition by vividly illustrating his vision and mission, and by joining in fellowship with his crew. He built public anticipation for his mission even before hiring employees to join his “organization”. Building a positive reputation of your organization externally helps drive a strong and progressive organizational culture internally. “By endurance we conquer” - Sir Shackleton’s family motto as well as his own professional ethic. He motivated and managed the performance of his crew through hard (physical) work. All men were tasked with menial duties regardless of skill level. Just as they worked hard, all “played hard”. Sir Shackleton encouraged to play and song among his crew. Modern organizations need collective work effort to be a part of performance management strategy.

### **Conclusion**

Shackleton's failed quest to reach the South Pole is still a management tutorial in how to face repeated crises despite his expedition being over 107 years old today, modern organizations are still faced with similar tough & uncertain circumstances for example; the financial crisis of 2008; the gulf oil spill of 2010; the Japanese nuclear disaster, the debt-ceiling debacle and COVID-19 pandemic. Constant turbulence seems to be the new normal, and effective leadership is crucial in containing it. When Shackleton’s expedition encountered serious trouble, he had to reinvent the team’s goals. He had begun the voyage with a mission of exploration, but it quickly became a mission of survival. Progress towards becoming a more effective organization means progress towards increasing your impact without forgetting the most important of resources “PEOPLE”. Modern organizations can continue to draw vital lessons of survival, flexibility, people management and endurance from sir Ernest Shackleton hence it is prudent to conclude that the Endurance voyage is a useful tool for leadership and management.

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