

Coaching for matrix management

Philip Atkinson

Building a matrix culture

Responding to change and dealing with it speedily are typified in an organisation through the culture of matrix management. This module outlines the key characteristics of the matrix culture and explains how to coach teams to cope with the pressures and build a strong and resilient matrix culture.

It is impossible to explore how to coach for a matrix culture without defining in precise terms the core characteristics of an organisation designed or operating on matrix principles. When we first focus on matrix management, we imagine a very precise defined structure that outlines clear and precise steps for building a matrix culture. I use the word 'culture' rather than 'structure'. It is relatively easy to discuss the cross latticework or the horizontal processes linking the disparate functional silos without appreciating that this is more than a clinical series of coordinates plotted on a grid network. To my mind, management groupings frequently create a virtual matrix structure, but on investigation this is simply a set of coordinated service-level agreements (SLAs) linked together as part of a supply chain.

Building a matrix organisation is more of a managerial mindset focusing upon emotional intelligence (EQ), leadership and team-building capabilities. A matrix culture may exist without a firm infrastructure, but it is not without the right degree of win-win relationships or the interpersonal competence reflected in EQ and used by many parties who realise the whole is greater than the sum and the ego of the separate parts. It is about creating culture that focuses on the win-win aspects of the matrix organisation.

What is the matrix organisation?

Few organisations are brave enough to begin the journey to build a strong culture. Matrix implies operating across the organisation as well as top down. Traditional bureaucratic organisations favour the silo-driven functional structure. This is fine when times are predictable and the rate of change is slow – but when organisations have to react to sudden and potentially threatening change, they have to adopt a different way of managing. Organisations have to run fast just

to keep up with their competitors. They have to anticipate trends in their marketplace and, more importantly, incorporate these changes into implementation and operational plans. If organisations cannot adopt a matrix style of management, they may suffer serious consequences.

Some history – NASA

Initially, matrix management was the province of hi-tech companies in the USA. Large organisations such as NASA had to adopt a matrix culture and structure in order to deal with the demands on their decision-making abilities and need to deliver outstanding results with minimal risk. The need to manage risk and integrate all functions was critical. Because of a high rate of differentiation between functions and technical specialities, NASA needed a matrix culture to ensure decision-making and operational plans were synchronised. They were not alone in this search for continuous improvement. Other industries also needed to integrate the ideas and the actions of their best minds, and to unlock the power of their people.

The commitment of the whole team to drive for improvement was impressive. What made it work was a plant manager ferocious for change who believed that ego was usually followed by a fall. This ego-friendly climate in a male-dominant preserve demonstrated what could be achieved with a genuine concern to do a good job and, most importantly, preserve their jobs and their role in the organisation.

All coaches attended coaching workshops that focused on interpersonal skills and developed a rigorous reporting system to ensure delivery of agreed personal contracts. This was impressive, because my experience is that in many European companies there is a general shying away from recording progress in a documented format.

Lessons learned

Within this final section I have incorporated both issues related to the structure and the process of building a matrix culture. They are inseparable. You cannot send a coach into this environment and start a coaching revolution without having a structure upon which to build it.

Top-team commitment

I really don't believe enough facilitators or coaches spend enough time removing the barriers at this level. Time invested in challenging attitudes at senior level will benefit all, and win the respect of the senior team. Coaching can be tough love and requires some directive and challenging strategies. It shouldn't just be perceived as a soft, sensitive approach to development. It is no good being sensitive when the business of 120 people and the larger business could be disadvantaged.

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Focus on strategy

It is important to know where the business is going, and the key challenges, demands and constraints it will face. From this example, the management team were won over to the process because it had a focus and a tangible direction with bottom-line payoffs. It also gave them a structured approach to analyse their capabilities against the demands of others. A key learning issue is always to remember that coaching needs a structure upon which to hang its processes.

Break down the bureaucracy or functional silos

Functional silos create mini-empires with lines of authority. In the times when change was perceived as slow, functional organisation was never efficient but could cope with the demands of the changes in the environment, especially in organisations that proved to be very traditional, with several layers of management. The

strategic review paves the way for complete agreement on working across boundaries – so the use of hard and soft tools is reinforced as a key message and lesson.

Staff as learners and coaches

Within some organisations the move towards matrix management is focused on reducing unnecessary layers of management. In this example, it was for shaping their viability in the future – there were few savings to be made. The coaching intervention used to install a matrix culture instilled a high degree of responsibility and ownership with work teams both to coach and to learn. Some organisations may be oversupervised or managed, resulting in too few employees taking responsibility.

In the case study, other benefits accrued – such as increasing the fluidity, accuracy and speed of decision-making. Blocks and barriers to performance were removed and the business unit began to anticipate customer needs, ultimately to reduce work and design cycle time, waste and rework; and to promote a huge degree of personal accomplishment. It demonstrates that team coaching can work to build a matrix culture as long as it focuses equally on structure and process.

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The coaching requires directive and challenging strategies

Hi-tech companies

It was not just NASA who committed to this approach. The oil industry and pharmaceuticals that were under competitive threat, along with the electronics industry, were also very keen to follow the matrix route. Car makers had to commit to a matrix culture in order to reduce the cycle time from prototype design to delivery on the road. Major car manufacturers had to commit to a matrix culture so they could compete with Toyota and Honda. Their Japanese competitors use lean manufacturing and a matrix organisation to speed up decision-making and the creation of a wide range of motor vehicles. Matrix management has moved from these industries to the service sector.

Differentiation and integration

Matrix management is based on two key principles. The first is specialisation or differentiation. This means that all parts of an organisation are specialised and usually grouped under management functions. As the

organisation becomes more complex, we tend to find that specialisation increases, and fewer understand the larger picture of how those functions all fit together to deliver results. The second key issue is integration. The more complex the business, the more intricate the integrating mechanisms have to be. So we have a force pushing us to specialise, but we also need to ensure that all understand the bigger picture. Matrix management is managing the degree of integration. Some focus on systems to facilitate this, but generally speaking it is a mindset – that is, managers have to lead the process to ensure that all functions are totally integrated, so that the organisation can benefit from all its component parts. We can make the concept complex, but why should we? The manager's job is to bring together all the elements of the business, and it makes sense to operate under the auspices of matrix management. Many of us do this through habit or naturally operate that way. Experience has taught these people that they must bring all parties together to resolve issues.

Others may need more guidance, training or coaching.

In order to explore the importance of coaching for the matrix organisation, it is a good idea to see how the cultures differ. See the boxed inset for a comparison between the traditional and the matrix organisation.

- Managers have functional, process and project responsibilities – moving away from the hierarchical model to much more flexibility – resulting in a more organic team-driven approach where authority is based on expertise, not just position.

- Multiple reporting relationships with teams working across boundaries – this requires people to think outside the box and their traditional roles in the business. It also requires staff to be accustomed to reporting to process, not process owners, as well as functional managers.
- Multi-tasking opportunities resulting in flexible and adaptable staff – when working across boundaries there are opportunities for cross-training, resulting in multi-skilling.
- Rethinking layers of management and processes and speeding up decision-making – many organisations are oversupervised and fail to take advantage of their staff capabilities.
- Managers have a more hands-on approach – becoming focused on coaching, not just controlling activities.
- Staff working closely together in self-managed teams – gives the opportunity to develop a cross-

match of capabilities between staff and business plans.

Coaching for a matrix culture

To illustrate the point, I will refer to a short case study. This involved a technical engineering centre as part of Case Corporation in the USA. This technical facility was very progressive, but it was overworked in testing new product manufacturing capability for the whole company. This business employed over 120 highly technical (many holding Master's and PhD qualifications) and well-qualified engineers whose job was to assess capabilities and design methods to facilitate the manufacture of both key components and the building of construction and agricultural vehicles. Further, their techniques and approaches had to be incorporated into the manufacturing strategies of companies in all five continents.

This organisation was the key to the rest of the business. If this small organisation failed, the 20,000 staff employed worldwide would not be able to do their job and the company would suffer. The plant manager committed to move from a fairly standard functional organisation to a matrix culture. Team coaching was the key process and would take six months to become business as usual.

This was the process undertaken:

- Top team confirmed and undertook a strategic review of the business. This was central to coaching because this process identified the core competencies required by this smaller organisation to feed the larger business. Using various strategic models, they were able to predict the workflow they would experience of new prototype products from which they could

create manufacturing best practice, so that plants throughout the world could actually follow instructions, undergo training and produce a variety of these products. This plan was to accommodate the future of the business over a very uncertain two-year timeframe.

- From this analysis, the case team was able to extrapolate the core areas of expertise which would be critical to deliver to the strategic plan. Within a month the team had developed their own matrix of experiences and skills for every employee and were able to isolate those areas where they lacked competence or where their achievements and contribution could be at risk. There were several blank coordinates in the matrix that highlighted core weaknesses in staff capabilities. This became the first task for coaching.
- The team explored various inter-personal and team-based models to identify their most preferred team style. We used profiling to provide a good triangulation of people's interests and ability to work with others, including Myers Briggs, Firo and OPQ and team-development exercises. They used these analyses to allocate technical and process coaches. Technical coaches had a more focused tutoring role, helping their colleagues up the learning curve and equipping them with technical skills. The process

coaches focused on how to make the matrix work. They concentrated on the frustrating elements of working with multiple reporting relationships. Most of the engineers had a reporting relationship with the plant director of this technical centre and with various plant managers who were responsible for specific product lines throughout the world.

- The complexity of the reporting relationships would not diminish without the patience and the demystifying qualities of the process coaches working one to one with every employee to develop a personal development plan (PDP). This PDP was very precise and concentrated on specific actions that could be taken to remove any haziness from the general picture. The process coaches added clarity where others experienced fog.

This resulted in a complex organisation chart in which we could follow each person's responsibility as either a coach or a coachee. As mentioned, there were process and technical coaches. Some people with the right skill and experience mix occupied both roles. Some of the staff more junior in status had extensive experience, and often they were coaching someone higher in status on the technical aspects of the work.

Category	Traditional	Matrix
Leadership	Directive	Consultative
Authority	Position	Knowledge
Decision-making	Positional	Consensus
Communication	Top down	Multi-directional
Climate	Control	Trust
Team relations	Adversarial	Win-win
Motivation	External	Internal
Change focus	Mechanical	Learning
Planning	Short term	Long term

Comparison between the traditional and the matrix organisation