About Roffey Park

Roffey Park is an internationally renowned leadership institute based in the UK and Singapore.

We develop people who develop organisations.

With 65 years’ experience of leadership, organisational development, human resources and coaching, we provide executive education and research to many of the world’s leading companies and organisations.

We offer tailored development programmes, qualifications accredited by the University of Sussex, management consultancy, coaching and training courses. Our research services provide a unique combination of research, consultancy and development expertise for organisations who are investigating ways of improving their effectiveness and intelligence.

Research at Roffey Park

Roffey Park funds its own research programme with the aim of meeting one of its charitable objectives: namely to conduct and publish research in support of the health and welfare of people at work. Our research improves the world of work and organisational performance by sharing knowledge of good practice in people management, leadership and organisational development.

For more information visit www.roffeypark.com or contact:

UK Office  
Tel: +44 (0) 1293 851644  
Email: info@roffeypark.com

Singapore Office  
Tel: +65 6549 7840  
Email: singapore@roffeypark.com
Executive Summary

Matrix organisations and matrix ways of working are seemingly on the increase. They present challenges and tensions for managers yet also provide organisations and teams with the ability to meet the demands of an increasingly global and complex business world. Effective matrix working goes beyond considerations of structure and embraces culture, leadership, organisational values, strategy and psychology. As Ford and Randolph\(^1\) explain, a matrix organisation is:

“any organization that employs a multiple command system that includes not only a multiple command structure but also related support mechanisms and an associated organizational culture and behaviour pattern.” (p269)

Since the early 2000s support for well implemented matrix structures has been growing, mainly due to the prevailing view that adopting matrix working is the only way for an organisation to survive in today’s environment. Yet matrix working is much more than structure. In developing our enabler model of effective matrix working we have formed the view that for matrix organisations to be successful they need to develop a strategy and culture which supports and facilitates cross-functional working and collaboration; to have processes that encourage dialogue and flexibility; and have resilient leadership groups able to manage diverse teams and the tensions of matrix working. We outline our model below.

**ORGANISATIONAL ENABLERS**

Our research supports the work of leading writers, such as Galbraith\(^2\), in suggesting that organisations that have successfully implemented matrix working haven’t just changed reporting lines, they have focused on aligning strategy, culture and HR processes so that they lead, support, encourage and reward matrix working. They are also aware that matrix working is a way of thinking and behaving which needs to be reinforced by strong collaborative values, such as communication, team working, cooperation and supporting others.

“Collaborations has been one of the new organisational values that has been introduced, so they are trying to put all of these pieces in place so that collaboration is encouraged, enabled, supported etc.” HR Manager, IT Professional Services

These organisational enablers are strengthened by the organisation articulating a clear vision and common purpose which connects and engages staff across the organisation.

**LEADERSHIP ENABLERS**

Leaders have a challenging role within matrix structures. They need to be able to hold the many tensions associated with managing shared resources, joint accountability, competing agendas and collaborative decision making, take corrective actions when needed and provide support for their teams. The ability to manage conflict and ambiguity is therefore a key leadership enabler, and whilst absolute clarity and certainty is unlikely to be achieved, strong peer group relationships and communication are critical for helping reduce role and expectation conflicts. Developing stable and trusting teams requires a significant investment from leaders, particularly in matrix teams which are typically more diverse, culturally and functionally. Creating a superordinate mission for the team which facilitates a common and shared objective, and taking steps to build a team climate of trust are encouraged. Our research found that leaders who take steps to secure senior level support and deliberately create senior champions for their projects are more likely to be effective working in a matrix, as are those who exhibit strong communication skills enabling the flow of information and ideas across the team, whilst also being able to make their goals resonate with others, generating engagement and support.

**INDIVIDUAL ENABLERS**

In a matrix environment the ability to express personal conviction and ownership of project goals is highly important due to the collaborative nature of the work and the need to secure the support and co-operation of others, over whom an individual may have little or no direct authority.

“You haven’t got direct authority to ask people to do things, it seems like there has to be something that comes from your inner strength, your inner belief in what you’re doing.” Senior Manager, Charity

In addition, an individual’s ability to harness sources of personal power and influence is a core skill when operating in a matrix, where traditional authority and power are likely to have less currency. Traditional command and control forms of power such as position and hierarchy are less likely to be effective. Sources of power that create a positive form of engagement such as: demonstrating your beliefs and values; your expertise, skills and abilities; or building trust, respect and a sense of shared goals are likely to win hearts and minds. Finally, matrix working is fundamentally about creating the conditions which support collaborative working. People who are able to build connections, collaborate and network will thrive in these environments

---

The enabler model for effective matrix working

The model

The enabler model for effective matrix working was developed from a literature review and interviews with matrix workers. It aims to highlight the characteristics that support matrix working from a whole system perspective, including strategy, values, HR processes, leadership, team dynamics and human behaviour. In this Volatile, Uncertain, Complex and Ambiguous (VUCA) world organisations need leaders who are able to pay attention to the various aspects of the organisational system, and to know how to leverage them effectively to create a collaborative culture. It is this approach that will ensure an organisation is equipped to survive today’s challenges, regardless of structure.
Top Tips for Leading and Living in a Matrix

- Network, network, network. Build a wide and diverse peer group with whom you can discuss ideas and ask to influence on your behalf. Think of every work day activity as an opportunity to meet someone new, or develop a stronger relationship with a previous acquaintance. Use social media, formal and informal channels of communication to stay connected and informed.

- Be transparent in your motivations. Be authentic. Articulate clearly and confidently how and why your approach is the right one for the business as a whole. Make your goal and vision meaningful for others to share.

- Know your stakeholders, their ambitions and challenges. Have one-to-one conversations with senior and influential stakeholders to secure high level support. Create champions.

- Be clear about your objectives and map these to the needs of your stakeholders and peers.

- Regularly review project needs, resources, responsibilities and priorities to reduce ambiguity and conflict. Become skilled at having assertive, productive conversations with other managers.

- Harness your sources of power to engage others. Demonstrate expertise. Be values-driven and build trusting relationships.

- Role model lateral communication and collaborative working. Consciously create time to support others in different parts of the business.

- Develop your communication skills. Be informed and share information widely. Be engaging. Present a compelling reason for others to collaborate with you and be courageous when faced with opposition.

- Be an enabler. Champion the team successes and achievements, articulate clearly how the team’s endeavours are making a difference to the business.

- Invest time supporting and building trust within your team. Where possible, personally select or recruit team members. Develop a super-ordinate goal that integrates the different perspectives, values, needs and expectations of team members. Focus on building a climate of trust, particularly at the early stages of team formation.

- Carefully select which projects to collaborate on (and which to not). Faster and more flexible decision making is possible within matrix teams when project teams have the authority to make decisions and have the key people involved in the team. Ensure unnecessary stakeholder involvement does not result in slow decision making.

- Create opportunities to move around the organisation, build cross-functional knowledge of the organisation and develop relationships.
Top Tips for OD & HR professionals building an effective matrix organisation

- Review organisational strategy, culture and processes to ensure they are aligned and support matrix working.
- Ensure organisational vision and values are shared across the organisation, and provide a common purpose which galvanizes, focuses and legitimises cross-functional working.
- Build a culture which supports project team working, informal networking and collaboration. Ensure there are strong lateral/horizontal communication channels.
- Ensure that staff are engaged and supportive of collaborative working, as are technology and physical working conditions. Explicitly value time spent (within the working day) networking and relationship building.
- Ensure reward systems:
  - value collaborative effort equally to individual success (team bonuses or gain-sharing systems)
  - value delivery of organisation-wide projects equally to functional responsibilities
  - value job roles which ‘manage’ stakeholders, peers and cross-functional teams equally to roles which have direct line management of staff
- Ensure competency frameworks:
  - define leadership as a collaborative and enabling activity
  - value diversity - functional, regional, cultural etc.
  - highlight the importance of being authentic and acting with integrity
  - explicitly acknowledge dual management responsibilities, including reducing ambiguity, allocating resources and agreeing areas of authority
  - ensure collaboration, communication and negotiation are core competencies at all levels and for all functions
- Assess, select and promote staff who demonstrate:
  - resilience
  - flexibility and adaptability
  - collaborative style
  - conflict management skills
  - influencing and negotiating skills
- Recognise the complex, uncertain and dynamic organisational environment and provide opportunities for informal networking, learning sharing and idea generation to allow bottom-up processes to emerge
- Review high potential leadership development schemes which offer job rotation, to ensure they explicitly value lateral career progression and provide opportunities to develop a breadth of knowledge outside an individual’s functional area of expertise. This will encourage cross-fertilisation of ideas, the development of informal networks of contacts and relationships, as well as flexibility and breadth of experience.
- Articulate the benefits of working cross functionally – they can be a win-win for the organisation and the individuals involved. Encourage managers to participate in organisation-wide projects as they are likely to become more knowledgeable about strategy and operations and therefore be able to contribute more effectively and productively. Equally, working in cross-functional teams typically provides opportunities for personal development, learning and growth, for innovation and, in some cases, career development.
- Invest in social technologies that help people interact, share information and find people with whom to collaborate.
- Invest in team development. Roffey Park’s 2014 Management Agenda research found that team development was a low priority for organisations, for example, only 6 per cent of HR managers reported that building high performance teams was a pressing OD issue. Similar levels of resources to those invested in leadership development should be spent on team development, with a priority focus on the initial forming stages of teams, building shared goals and trust.

4 The Financial Times in 2004 found leading European companies spent on average £3,336 per participant per year on executive education
Related Reading

Equipping leaders to drive change in financial services
White Paper Free of charge

The UK Management Agenda 2014 Free of charge

Building Resilience: Five Key Capabilities
£10

Behavioural Economics - A coach’s view
White Paper Free of charge

The Singapore Management Agenda 2014 Free of charge

The Expert as Leader
£35