The Matrix is Everywhere

Matrix organizational structures first became popular in the 1960s aerospace industry. Organizing people around projects, rather than into pyramids, was seen as a way to improve efficiency and productivity in complex ventures. Since then, matrix organizations have become widespread in commercial industry and even the nonprofit sector, to varying degrees of success. Nowadays, many companies that never use the word ‘matrix’ are structured around numerous informal matrices and matrixed teams.

A new book by Susan Z. Finerty, Master the Matrix: 7 Essentials for Getting Things Done in Complex Organizations, aims to arm people in what she calls “matrix roles” with a new set of tools to tackle the unique set of problems they encounter regularly in their organizations.

Finerty outlines four types of matrix roles. The formal project matrix is comprised of a project management office structure combined with a functional or business reporting structure. The cross-functional team matrix brings in multiple disciplines/departments to address specific and often short-term projects or issues. The reporting relationship matrix is most often seen as an outgrowth of globalization—it involves reporting to multiple bosses across functions, businesses or geographies. The customer hub matrix involves teams dedicated to meeting internal or external customer needs across a product line or business with a center of the hub coordinating resources.

The complexity of organizational webs has grown rapidly, but most people working within a matrix, if they are even aware that they are in one, have little guidance on how to navigate it. A matrix represents a departure from the hierarchical structure of traditional organizations. But for the most part, when problems arise in matrix organizations, “traditional” solutions are the only tools applied to solve them.

Why Traditional Methods Don’t Work

The matrix turns traditional assumptions about responsibility and authority upside-down. Lines that are clear in traditional hierarchies are blurred or even completely erased in matrix roles. When you report to two or more managers, how do you juggle their competing demands? When you lack the authority to implement a change on your own, how do you negotiate to get it done?

Where conflict is generally considered something to avoid in traditional roles, matrix roles are designed to create conflict. The matrix is constructed to bring together disparate parts of the organization in hopes of creating synergies that benefit the enterprise.

But when conflict is not directed toward the right targets, it can have a huge negative impact on productivity. Tackling the problems that arise in matrix roles with the strategies designed for traditional roles will limit relationships, narrow perspectives and result in unsophisticated solutions. It can also unintentionally create political rifts and disenfranchisement within an organization.

The ability to work effectively within a matrix is becoming a distinguishing competency at every level of the organization. Some people make great strides in matrix roles in spite of the complexity and challenges. What’s their secret?

Some matrix masters are born, but most are made through years of experience and trial and error. In Master the Matrix, Finerty sets out to describe the skills and practices that get results in matrix roles. The book is based on her surveys and interviews of over 100 experienced matrix practitioners. It distills their years of insight working in matrix roles into straightforward approaches that anyone can learn and apply.

The 7 Essentials

The essentials of matrix mastery are a start to naming what it takes to achieve results in matrix roles. They can be applied in all types of matrix roles, and at all levels of an organization. The problems encountered within a matrix are as diverse as matrices themselves. The essentials are not a specific set of instructions for how to succeed, but rather a strategy to gain traction in handling any set of issues.
THE 7 ESSENTIALS

You have to
Start with Partnerships
(ESSENTIAL #1)

These partnerships are forged with the aim to
Get Goals Aligned, Roles Clear and Decisions Made
(ESSENTIALS #2, 3 & 4)

All of this requires you to
Flex Your Influence Muscle,
Communicate without Assumptions, and
Treat Meetings like They Matter
(ESSENTIALS #5, 6 & 7)

The Building Blocks of Matrix Mastery

Four common elements are woven throughout the
7 Essentials: Mindset, Jujitsu, Zoom Out and Triage.

The way you think about something
affects your actions and ultimately your outcomes. Changing your results starts
with changing your attitude. Adopting the
right mindset is fundamental to approaching any of
the essentials. Otherwise, you risk appearing disingenuous and limiting your results.

Jujitsu is a 2,500-year-old martial art that
involves redirecting the force of your oppo-
nent, thus using his or her own strength to
your advantage. The concept of jujitsu is criti-
cal to coping with the conflicts that arise in matrix roles.
Fighting back is exhausting, and even if you win a battle,
you probably lose some good will in the process. It may
seem counterintuitive, but stepping back and disarming
the conflict by giving or giving in can be a powerful ap-
proach to building your reputation and strength.

Perspective is everything in a matrix role. Zooming out to take in the bigger picture
of competing needs in your organization
is like flying in a traffic helicopter rather
than sitting in the middle of a traffic jam. It gives you
the power to anticipate the needs of other people in
your organization and identify targets for influence,
communication and involvement.

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. In a matrix role you have a
unique purview—you see more. To avoid being
overwhelmed by all that you see, you must prioritize.
Accepting that you can’t take on everything and
applying the principle of triage is critical to avoiding
frustration and burnout.

The Research

The research for Master the Matrix included
surveys and interviews with over 100 matrix
practitioners, from across a variety of industries.
Subjects had an average of 10 years of experience working in a matrix environment. The four
matrix roles were equally distributed among
the respondents. Although their specific roles
and experiences were unique, a number of
common themes appeared in the data.

Key Findings

Top 5 Challenges:
1. Competing goals
2. Prioritization of work
3. Holding people accountable
4. Getting decisions made
5. Power struggles

Top 5 Key Skills Required:
1. Building relationships
2. Building trust
3. Deciding what is most important
4. Influencing without authority
5. Political savvy
**ESSENTIAL #1**

*Start with partnerships*

Partnerships are integral to matrix roles, where almost no endeavor is purely independent. The key steps to building effective partnerships are identifying who you should be partnering with, building the right kind of partnership for a particular set of needs, and making the right investments to shift those partnerships in the right direction.

Matrix roles require you to look beyond your team, function and geography to identify partners. Matrix partnerships can be described along a continuum defined by level of integration (how much you shape your work and decisions around your partner) and needs (the degree to which the partnership is based purely on business need versus relationship). See figure below.

Four types of partnerships are common: **new/dysfunctional**, where a minimal business need is present but there is no relationship; **transactional**, which is characterized by simple hand-offs of information or products; **collaborative**, with tasks that are less discrete and closer collaboration; and **integrated**, characterized by close coordination of planning, goals and decision-making.

Basic efforts (or “Baseline Investments”) in trust, communication and conflict resolution can put new or dysfunctional partnerships on the right track. “Up the Ante” investments such as advocating for the partner, including them in key decisions and planning, and leveraging conflict can elevate transactional partnerships to the collaborative or integrated level.

**Case Study: Many partners, many integration levels**

Jose, a multiple-matrix finance director for an insurance company categorized his partnerships in this way:

**John, VP Finance**, solid-line boss: “I am quickly becoming the resident expert on the operations of my business, and he depends on that. I depend on him to look out for my career. I am his go-to person on a lot of things, and I don’t hesitate to go to him for counsel on anything. He’s gone to bat for me, and I have for him.” 

*Integrated Partner*

**Victor, team lead for a cross-functional team** Jose is on: “We have worked together to get this team off the ground—he knows the product, and I bring the financial expertise.” *Collaborative Partner*

**Barb, General Manager, dotted-line boss:** “Relationship is fine, I go to her for approvals and reviews as I need to.” *Transactional Partner*

**Ann, boss of some team members on Jose’s project team:** “This one is rough. I feel like I am competing with her for the time and attention of the team members. I say one thing, she says another, and the team is caught in the middle.” *Dysfunctional Partner*
ESSENTIAL #2

Get goals aligned

At organizational intersections, misalignments are unavoidable—sometimes even intentional. To master the matrix you must be artful in bringing together those misalignments with the potential to be constructive, while also vigilant in identifying and resolving conflicts with the potential to derail.

Not all goal conflicts are created equal. “Natural” misalignments embody the purpose of the matrix (the bringing together of different parts of the organization to benefit the enterprise as a whole). “Man-made” misalignments are created because we forget to communicate, assume alignment or let goals drift until they collide.

The goal for natural misalignments is to channel and cultivate. This requires teams to keep their big-picture needs in the forefront, avoid personalizing the conflict or losing perspective on the goals of others, and use their trump card (flat-out disagreement) wisely and sparingly.

Prevention and resolution are the keys to managing man-made misalignments. To do this, you have to align goals right from the start (in initial goal setting) and realign as you go. This means you need to include the right people in goal setting, land on a limited set of goals, keep those goals in the foreground and be diligent about both looking for misalignments and partnership-focused in resolving those that come up.

In Practice:
Goal alignment in each type of matrix role

**Reporting Relationship Matrix:** It is very likely that your bosses will have conflicting goals, with you stuck in the middle. Do not try to please both; instead use triage to prioritize them. For critical misalignments bring your bosses together and shine a spotlight on the conflict. To avoid letting the situation become political, stay neutral and do what you can to facilitate communication between the two bosses while keeping the bigger organizational goal in mind.

**Customer Hub Matrix:** Managing conflicting goals will be an almost daily occurrence, as the formally set goals of those in your hub trickle down to day-to-day priorities that conflict with your own. Goal alignment and inclusive goal setting are going to be absolutely critical for you. Include others in your goal setting, and also insert yourself into theirs. This will help to build your understanding and appreciation of their objectives, as well as allow you to give input about your own needs.

**Cross-functional and Project Team Matrices:** Natural misalignments are the cornerstone of your matrix team. Don’t let these misalignments frustrate you or derail the team—this is why you exist. At the same time, be vigilant about rooting out man-made misalignments and telling the difference between the two. Get good at leveraging these conflicts by first keeping them impersonal. Act as a role model and encourage the behaviors necessary to channel and cultivate natural misalignments.
ESSENTIAL #3

Clarity roles

Boundaries can blur in matrix roles. The key to understanding roles is to define them without expecting total clarity and then get comfortable with what isn’t clear. Accept roles as they are, and build trust to fill gaps in clarity.

Role clarity starts with getting role definitions right from the start. RACI charts that outline who is Responsible, Accountable, Consulted or Informed are a widely used tool for role defining. But the dialogue that goes into developing a RACI chart is as important as the chart itself in building trust and flexibility into role boundaries.

Boundaries are breached for a number of reasons—ranging from lack of awareness to lack of acceptance of the role’s definition (see figure below).

When boundaries are breached, and they inevitably will be, approaching it in the right way is critical to resolution. Assume that people are operating under the best intent, and gauge your response to the verity and/or frequency of the breach. Use boundary breaches as an opportunity to build partnerships through refining your roles rather than as a reason to antagonize in your partner.

Finally, keep a realistic perspective—remember that role conflicts are par for the course, and role definitions must rely on trust to be effective.

Case Study: Build Trust before Blaming Role Clarity

Role clarity is a noble endeavor, but implemented incorrectly or for the wrong reasons, it can be damaging.

A US subsidiary of a large European company had invested significant organizational resources on an initiative to clarify roles for roughly 10 different types of project team members using a RACI-type model. Six months after its implementation, they wanted to know if people were using the role outline and whether the framework was helping teams work more efficiently. Interviews revealed that the role document was being used—but as a weapon. One relatively new project manager carried the role document everywhere to point out role breaches by other teams, which in turn put those teams on a quest to identify his encroachments. This behavior led to defensiveness and mistrust throughout the organization. Ultimately, the role document the company had invested so heavily in had become a source of divisive conflict rather than proactive planning.

This story illustrates what can go wrong when you insert structured role clarity into an organization whose real issue is trust. The same problem can occur in one-on-one situations. Role definitions should be used offensively, not defensively. By itself, role clarification can’t resolve trust issues. It can only facilitate the building and strengthening of partnerships when coupled with the right mindset. If trust seems to be at the root of problems in role clarity, go back to Essential #1 before attempting to build clearer boundaries.
ESSENTIAL #4
Get decisions made

The decisions in matrix roles, like the matrix structure itself, bring together diverse perspectives, divergent agendas and priorities, and competing interests. Decisions tend to be complex, and there are high expectations for transparency and inclusion. In many ways, decision-making is the culmination of matrix mastery. You must leverage partnerships, align goals and clarify roles, which requires influence, communication and meeting leadership skills.

There are major differences between decision-making in traditional and matrix roles, as outlined below:

<table>
<thead>
<tr>
<th>TRADITIONAL ROLES / ORGANIZATIONS</th>
<th>MATRIX ROLES / ORGANIZATIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>MAKING THE DECISION</strong></td>
<td>Hierarchy/title-driven</td>
</tr>
<tr>
<td></td>
<td>Straightforward, linear</td>
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<tr>
<td></td>
<td>Often behind closed doors, unstructured</td>
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<td></td>
<td>Often exclusive</td>
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<tr>
<td></td>
<td>Expertise, role, input-driven</td>
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<tr>
<td></td>
<td>Complex, much back and forth</td>
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<tr>
<td></td>
<td>Need for transparent process</td>
</tr>
<tr>
<td></td>
<td>Inclusive</td>
</tr>
<tr>
<td><strong>EXECUTING THE DECISION</strong></td>
<td>Authority-driven</td>
</tr>
<tr>
<td></td>
<td>Communication on the “what” of the decision</td>
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<tr>
<td></td>
<td>Requires little follow-up</td>
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<tr>
<td></td>
<td>Ownership-driven</td>
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<tr>
<td></td>
<td>Communication is transparent on the what, why, how and who</td>
</tr>
<tr>
<td></td>
<td>Can require significant follow-up</td>
</tr>
<tr>
<td><strong>KEY CHALLENGES</strong></td>
<td>Making the right decision and using authority to implement</td>
</tr>
<tr>
<td></td>
<td>Balancing decision-making speed with inclusion</td>
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<tr>
<td></td>
<td>Knowing who is the ultimate decision-maker</td>
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<tr>
<td></td>
<td>Gaining ownership in the decision to make it “stick”</td>
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When traditional decision-making approaches are applied in matrices, the outcome often involves alienation of coworkers and poor implementation of the decision. Remaining open to input, accepting the need for broad-based involvement, and taking extra steps to communicate in implementation are critical to the success of a decision.

Matrix mastery requires you to change approaches to decision-making depending on organizational needs and the specific decision in question. Similar to role definitions, up-front investment pays dividends down the road. Take the time to determine who will be involved in making and implementing the decision as well as identifying your overall objective before attempting to reach any conclusions.

In Practice: Decision-Making in the different matrix roles

**Reporting Relationship Matrix:** Decision-making can become difficult when two bosses have different opinions and preferences. Look at the bigger picture and set up the decision-making process carefully to help ensure success.

**Customer Hub Matrix:** Customer input and implementation will be your biggest challenges. Developing strong partnerships will mean inclusion in decision-making, which will provide you a chance to make sure the customer voice is heard. Ensure that people who implement a decision understand why it was made, especially from a customer perspective. They may be removed from direct customer contact, so don’t assume the “why” is obvious.

**Cross-functional and Project Team Matrices:** Investing in agreement is key. Have a clear, replicable process for making decisions and set parameters on how long you will strive to consensus and what happens if you can’t reach consensus. Make the people on your teams are “deputized” make decisions and don’t need to check back continually with the function they represent.
ESSENTIAL #5

Flex your influence muscle

In matrix roles, your accountabilities and responsibilities probably exceed your formal power. Lacking in power, influence is all you’ve got.

Opportunities to influence abound in matrix roles. Sitting at an intersection provides you a unique vantage point to see things that others may not notice. However, all this extra information can have negative effects: the perspective combined with the lack of power can become overwhelming, or, alternatively, you can attempt to control everything, which is both exhausting and can create resentment with your colleagues. The key to wielding influence in a matrix role is knowing when to use it and when to let things go—you must triage.

The other important dynamic is that influence in matrix roles starts well before the conversation or the presentation. There are techniques you can use proactively to increase your influence, as well as in the moment (see chart at bottom left).

Case Study: Frame Issues in a Way That Appeals to Your Audience

The “frame” is the one-sentence statement you use to define an issue. Any given issue has many possible frames. Is it a problem or an opportunity? An investment or an expense? A new product to consider or a chance to step into a new market? We often tend to frame things in one way—our own. Framing from the recipient’s point of view can get their attention right from the start.

Anne’s division had monthly senior leadership meetings that included the General Manager (GM) and his 10 direct reports. The GM loved them, but everyone else described them as “talking heads with updates that could have been emailed to me.” No strategic talk, problem solving, or interaction. Anne was given the dubious task to “fix” the meetings.

She talked to each team member, summarized the feedback and talked to the GM about it. He nodded politely, thanked her for her time and stopped just shy of patting her on the head on the way out the door. So she tried a different tack. A week later, she sent him an email framing the situation in financial terms. She calculated the hourly salaries of each leader, plus travel and other expenses. She changed her frame from “Your people think the time in these meetings could be better spent” to “Did you know you are spending $30,000 per month on these information sharing meetings? Is this your intended investment?” She heard back from him almost immediately. Reframing the problem got his attention. Once she had his attention, the influence was easy.
ESSENTIAL #6

Communicate without assumption

Communicating in a matrix role is challenging—a constant stream of information needs to be absorbed, analyzed and shared with others in your matrix. To pick up speed we make assumptions on who needs to know what, how they prefer to hear it and even what we ourselves need to know. These assumptions can lead to communication misfires that impact not only your work product but also your trust and credibility. These assumptions can become cyclical:

Understanding the risks and remedies to both over- and under-communication can help reduce your tendency to make harmful assumptions. Communicating to the wrong people or in the wrong way can be avoided by challenging your traditional assumptions of “who needs to know” and being sensitive to differences in communication styles across teams and functions. Realizing the challenges to communication in matrix roles is the first step to overcoming them.

In Practice: If You Want to Be Heard, Listen!

In a matrix role, listening is the bridge between your expertise and those of the people in your matrix. Without listening to each other, you are just experts on parallel paths who may never meet to create what is intended.

When we assume we have the full picture, we stop listening. Assumption-free listening is about realizing you don’t have the full picture, asking genuine questions when you need to and actually absorbing the answers you receive. Whether it is a new project or a new person or team you are working with, you only have a small slice of the information about their history, role and responsibilities. A little listening with curiosity and humility can go a long way toward not only gathering useful information for your problem solving and decision-making, but also in building partnerships.

Keep these tips in mind:

- When you think you know it all, ask two more questions.
- Ask questions like a 3-year-old: Why?
- Match defensiveness with appreciation, not more defensiveness
- Absorb what you’re told by restating it
ESSENTIAL #7
Make meetings matter

Meetings are where the matrix comes together to get work done—meetings are not separate from results, they are how results are achieved. Get really good at meetings, and you will have better partnerships. The results will follow.

The meetings that are convened in matrix roles are definitely not run-of-the-mill meetings—there is much more at stake. They are the most visible, public display of your abilities as a matrix manager. Done poorly, meetings can undermine every message you are trying to send about the meeting itself, as well as the project and you as the leader. Done well, they give you the opportunity to motivate through inclusion and building ownership where you can’t motivate through incentives or authority. We spend time and invest dollars trying to reward, recognize and ultimately motivate people. What motivates people? Getting stuff done. Friends, peers and camaraderie also motivate people. Where can you get stuff done while simultaneously surrounding yourself with friends, peers and comrades? Meetings! Meetings have great potential. But that potential is seldom realized.

Your success or failure at leading a meeting starts well before you have the group in the room. The thought and planning that goes into a meeting can make or break its success. Nothing in the moment—during the meeting—can make up for lack of planning on the front end.

These six steps are critical to a successful meeting:

In Practice: Even When It Isn’t Your Meeting, You Can Still Make It Matter

Realistically, there will be plenty of meetings in your matrix that you participate in, versus lead. When you aren’t leading the meeting, here are a few subtle ways to shift meeting behavior.

Guilt. Be the best meeting attendee ever. Ask questions, connect others’ comments, redirect conversation. Be on time. Be disciplined.

Volunteer. Ask the meeting leader if they want your help in agenda planning.

Demonstrate. Informally facilitate during the meeting—ask opinions, link, contrast and compare comments.

Coax. Ask questions to push a meeting leader in the right direction: “What results are you looking for?” “How will we choose which plan to use?” “How can I show up prepared?”

Be direct. If framed productively, the direct approach can be effective: “I noticed that we tend to spin our wheels in the first part of our meetings. I wonder if an agenda and some pre-work might help us get to resolutions faster.”

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<thead>
<tr>
<th>IF YOU DON’T…</th>
<th>YOU ARE TELLING PEOPLE…</th>
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<tbody>
<tr>
<td>… attempt to talk yourself out of it:</td>
<td>“I like to meet for the sake of meeting. I’ve got nothing better to do, and I assume you don’t either.”</td>
</tr>
<tr>
<td>… get really clear on your outcomes:</td>
<td>“This meeting isn’t important enough (and your time isn’t important enough) for me to spend any time on it.”</td>
</tr>
<tr>
<td>… craft your agenda:</td>
<td>“I’m not disciplined and won’t hold you to that standard.”</td>
</tr>
<tr>
<td>… invite and prepare the right people:</td>
<td>“What we talked about was really important at the time, but not as important once we went back to the real world.”</td>
</tr>
<tr>
<td>… facilitate the heck out of it:</td>
<td></td>
</tr>
<tr>
<td>… follow up and hold accountable:</td>
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Conclusion

Matrix roles are rife with pitfalls, obstacles and hazards. But matrix mastery is a skill that can be learned like any other.

For individuals, you have to keep in mind the following realities:

► Attempting to job hop you yourself away from matrix roles is a wasted effort—more and more, this is the nature of all roles in large organizations.

► It starts with you. Don’t wait for the organization to improve its matrix; improve your own.

► Don’t rely on any one Essential or technique, and don’t just try to leverage one strength. A mixed arsenal of skills is necessary for long-term success.

► If you or your team is struggling, look for multiple diagnoses and solutions. Don’t rely on just one panacea.

For organizations, the follow are critical:

► It’s not about the boxes. Although matrix structures start off as boxes on paper, they rely on people to work. That means investing in skill building versus attempting to remedy through reshuffling.

► Be mindful of setting matrix roles up to succeed. Incentive systems, politics and policies can make challenging matrix roles nearly impossible.

It is time to change the conversation. Too much talk about the matrix involves complaints and criticism. The 7 Essentials provide a framework and language for discussing the matrix constructively. Whether it is describing man-made versus natural goal misalignments or role clarity versus role acceptance, talk about issues in a constructive and objective way to start moving forward and getting things done.