

A guide to...

Effective matrix working



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Matrix Structures in Context

When you start to discuss matrix working with individuals from different organisations, the first thing that is abundantly clear is that we all have a different view of what matrix working is. Whilst there are common factors in people's definitions, typically 'a matrix team involves contributors from outside the function or team I am part of' and 'we are brought together to work on and deliver a specific project', the composition and management of matrix teams varies significantly organisation to organisation.

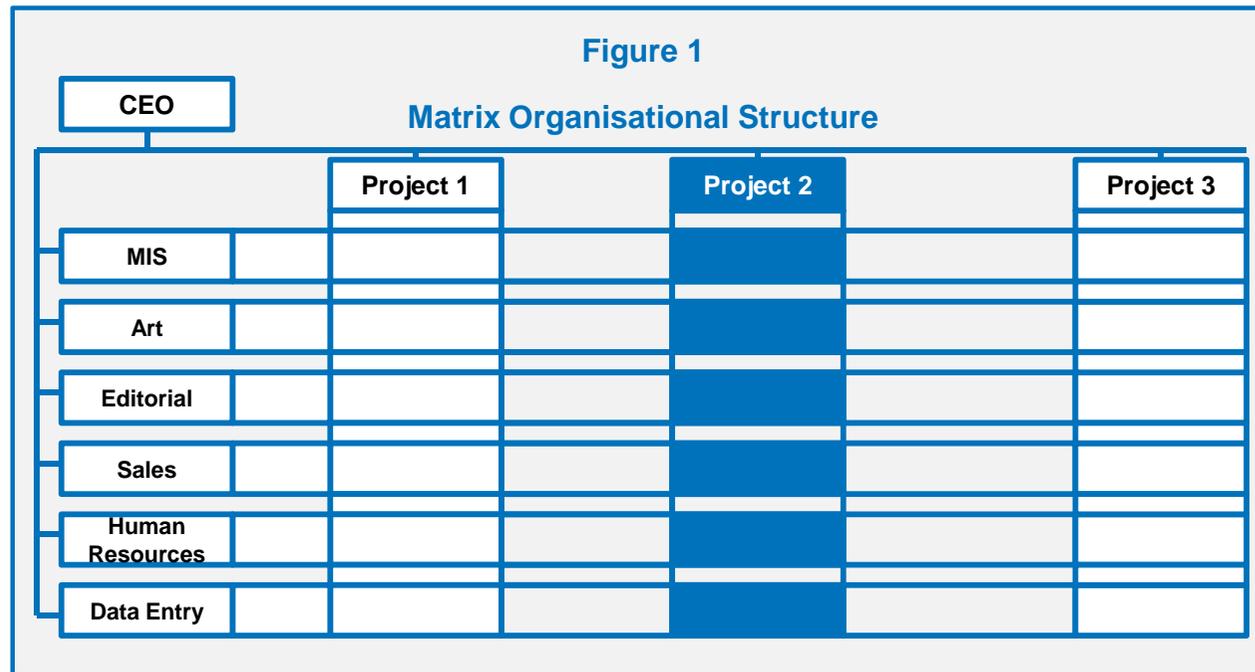
Matrix working has been the subject of a large body of academic research. Galbraith (*Matrix Organisation Designs, Business Horizons, 1971*) distinguishes different forms of matrix on a continuum which ranged from the functional organisation to the 'pure project organisation'.

The functional organisation is the traditional hierarchical structure in which the organisation is usually broken down into different functional areas, such as engineering, research, accounting, and administration. When applied to a product development effort, the project is divided into segments and assigned to relevant functional groups with the heads of the functional groups responsible for their segments of the project. Coordination is provided by functional and upper levels of management.



At the other end of the spectrum is the project organisation, in which all the resources necessary to complete a project are separated from the regular functional structure and set up as a self-contained team headed by a project manager. The project manager has direct authority over all the personnel on the project.

Matrix organisations lie between these two extremes by integrating the functional structure with a horizontal project structure. Instead of dividing a project into separate parts or creating an autonomous team, project participants report simultaneously to both project and functional managers (see figure 1).



Companies apply this matrix arrangement in a variety of different ways. Some organisations set up temporary matrix systems to deal with specific projects, while matrix may be a permanent fixture in other organisations. In addition, specialists may work full-time on one project or contribute to a variety of projects.

Galbraith identified three different forms of matrix structure based on the relative influence of project and functional managers:

A **Functional Matrix** occurs when the project manager's role is limited to coordinating the efforts of the functional groups involved. Functional managers are responsible for the design and completion of technical requirements within their discipline. The project manager basically acts as a staff assistant with indirect authority to expedite and monitor the project.

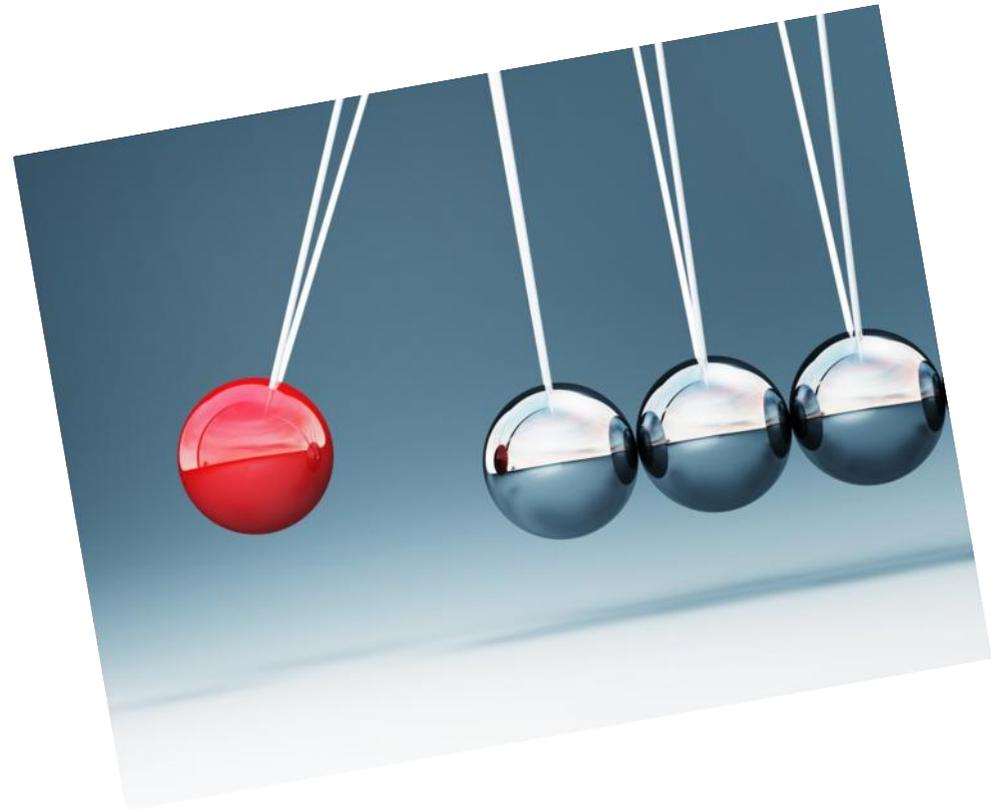
Conversely, **Project Matrix** refers to a situation in which the project manager has direct authority to make decisions about personnel and work flow activities. Functional managers' involvement is limited to providing services and advisory support.



Finally, a **Balanced Matrix** is one in which the project manager is responsible for defining what needs to be accomplished, while the functional managers are concerned with how it will be accomplished. More specifically, the project manager establishes the overall plan for completing the project, integrates the contributions of the different disciplines, sets schedules, and monitors progress.

The functional managers are responsible for assigning personnel and executing their segment of the project according to the standards and schedules set by the project manager. The merger of 'how and what' requires both parties to share responsibility and authority over work flow operations.

Matrix is essentially a compromise between the traditional functional organisation and a pure project organisation. It is more flexible than a functional organisation but not as flexible as a project team. At the same time, it is more efficient than a project team, but incurs administrative cost which is unnecessary in a functional organisation.



The Need for Affiliation

Even where there are hundreds of miles open to habitation, people still tend to build their houses close to the houses of other people. No matter the continent, no matter the culture, no matter the era, this is what we do. We are compelled from within ourselves to group together. Humans have evolved to be social animals; it is our nature to be so.

Humans develop within relationships, our connectedness to other people is a critical factor in the development of who we become. Our relationships with others give our lives meaning and purpose. Psychologists describe us as intrinsically 'relational', that is, not only do we develop within close relationships with others, but also the way we relate to the world and to ourselves as we move through life is deeply influenced by our early social development.

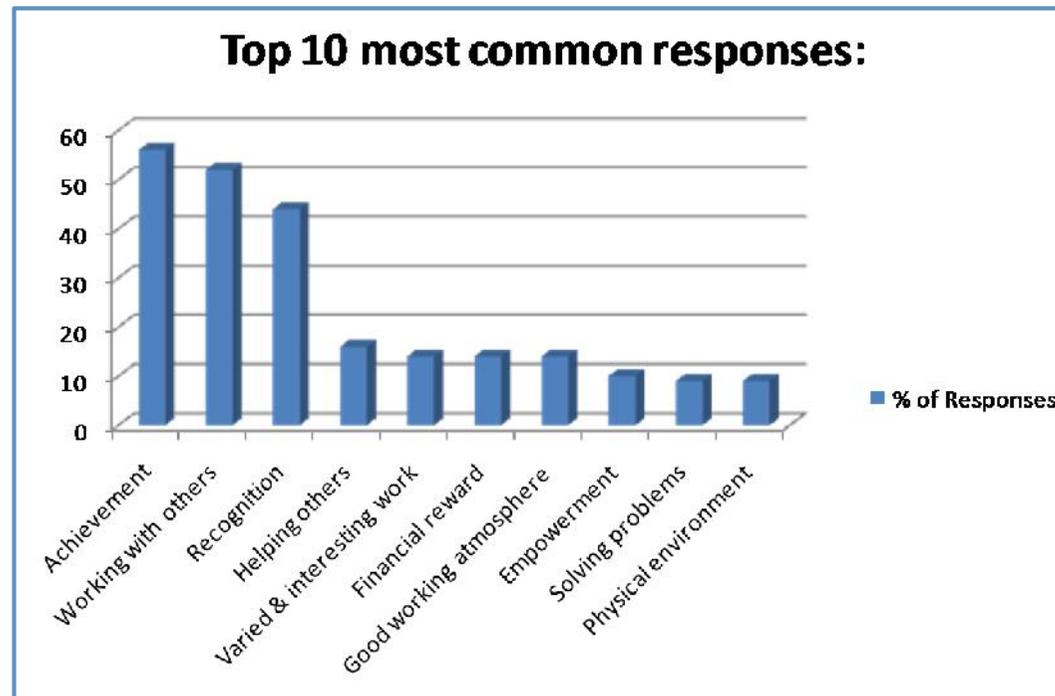
We are gregarious and social beings and have a strong need to be with other people and to engage in deep meaningful relations with those around us. Without this, our sense of who we are can wither and diminish.



Engagement and Motivation

Given that our minds have evolved with a strong need for social connection, it is not surprising that most people feel more engaged and motivated when tasks are carried out with other people – especially people that they feel they can relate to.

Research into engagement and motivation in the workplace, provides clear evidence of this. Asked “*what are the things that make you feel good at work?*” respondents to a recent survey shared the following (verbatim responses categorised into factors):



Survey data: 4,000 contributors and managers surveyed from a range of different employment sectors, Kaisan Consulting

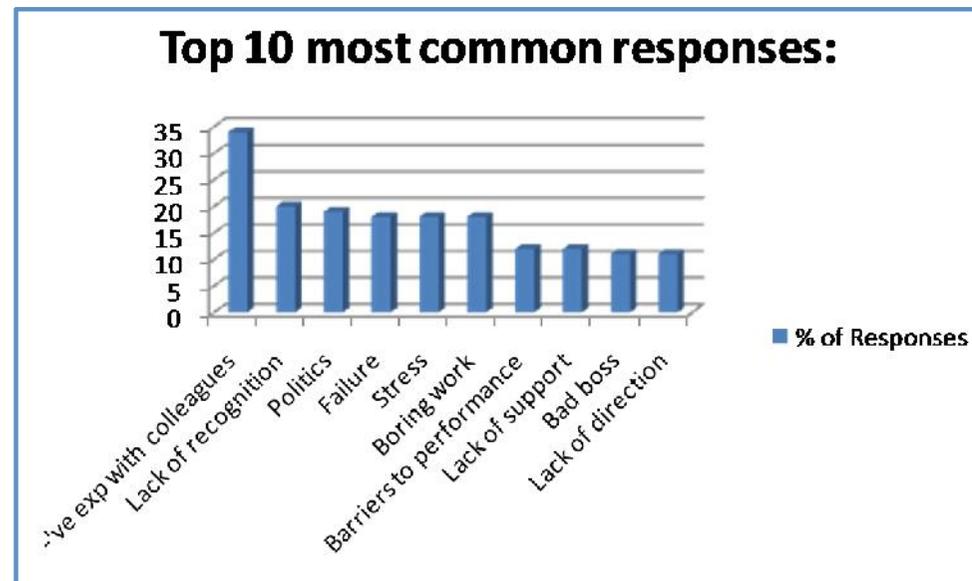
Affiliation, or 'working with others' is the second largest category of response, highlighting its importance as a motivational factor. The third highest category – Recognition is also relevant; to recognise the contribution of others requires a high level of knowledge and awareness of their activities, in addition to their contribution. It also validates the person who is recognised and enhances their motivation and self-esteem.

Helping others, the fourth category can similarly be linked to affiliation. Not only does helping others lead to a deeper level of engagement, recent research on wellbeing by the New Economics Foundation (2008) has shown that a strong connection with others (whether family, colleagues or neighbours) leads to people having a greater sense of wellbeing, enthusiasm for life and greater resilience to stress.

The same survey asked the opposite question "What are the things that make us feel bad at work?" The data here also provides insight into the links between affiliation, motivation and engagement:

'Negative experiences with colleagues', is the factor most likely to cause employees to experience demotivation in the workplace. 'Lack of recognition' is second.

We can infer from this that positive working relationships between people in the workplace are essential if people are to feel engaged and motivated.



Contributions from Neuroscience

Recent developments in our understanding of the human brain and its role in emotional attachment, mood regulation and resilience (e.g., Schore, 2003; Cozolino, 2006) can help explain some of these findings. Our brain has specific pathways that have evolved to enable us to bond with each other and to find such emotional connections rewarding and a buffer against feelings of anxiety and threat (Gilbert, 2009).

These pathways release neurotransmitters such as dopamine and oxytocin that make us feel warm, safe, connected and more empathic with each other. There is also evidence that activation of these pathways directly inhibits the threat systems of the brain (Gilbert, 2009), and of course threat and anxiety are inhibitors of engaged and creative working.

For most people connecting with others and feeling part of a group is intrinsically rewarding and when this works well allows them to work productively and creatively, using the group as a 'safe base' from which to explore.

So, feeling connected with the group or team can activate these bonding pathways of the brain and help us and reduce feelings of stress and free us up to be more creative.



Increasingly, we are all involved in a great number of social networks, from the relatively superficial such as internet discussion rooms, to the deeply engaged and personal, such as friends, family and various work and recreational groups.

Getting to know something about each other can of course lead to deeper and more rewarding levels of connection. Being able to place someone in their social context, knowing something about their likes and dislikes and being able to interact and engage with them more deeply builds stronger bonds between people (Gergen, 2009) and helps people feel more valued and validated.

Getting to know each other more deeply, engages areas of the brain that are involved in the processing of high level emotional meanings, giving us an intuitive or gut sense of things and deepening our understanding of the social world and our connection with each other. There is evidence that this level of processing takes place largely in the right hemisphere of the brain, which is more focussed on identifying general social patterns and developing empathy (McGilchrist, 2009).

With this level of engagement we are more likely to work productively and synergistically, bouncing ideas off each other and feeling part of a creative team rather than just an individual working alone.



Basic conditions for effective working

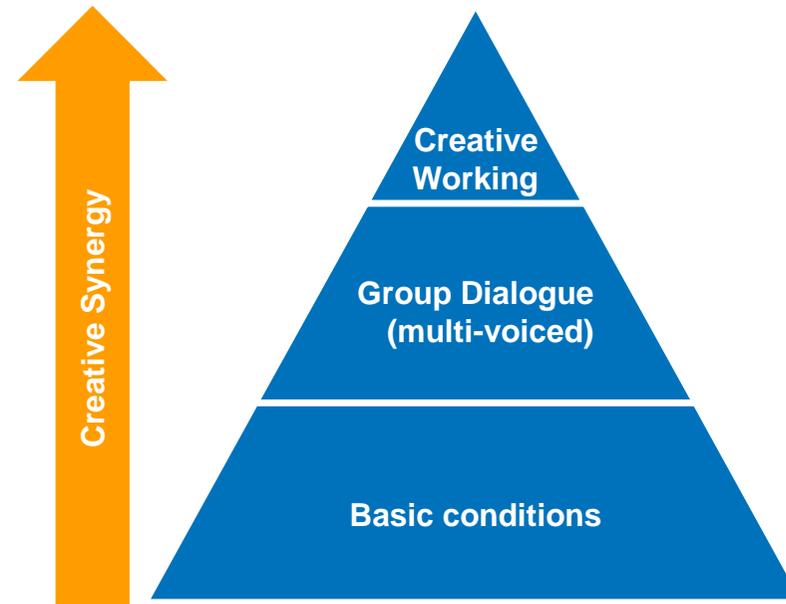
The more we get to know each other, the easier generally it becomes to develop trust, openness in communication, warmth and to feel that we can 'be ourselves' with other people (i.e., more authentic with other people). Obviously there are exceptions to this. We have all experienced teams and groups that have been dysfunctional and unproductive.

Creative synergy

When these basic conditions are met, there is an enormous potential for people to work together creatively. Gestalt psychologists talk about the whole being more than the sum of its parts, so bringing a number of people together to work on a particular project can lead to outcomes which go far beyond what one individual could have produced.

There can sometimes be a highly creative and productive synergy between people or groups of people. An example of such a relationship was that of Watson and Crick (Watson, 1999), the duo who unravelled DNA.

One important point about synergy and groups is that it is important to maximise the different perspectives within the group and not try to achieve consensus all the time as difference voices and perspectives are brought to bear on the problem, so the creative space opens up (Gergen, 2009).



Basic conditions

1. As we get to know each other, we develop trust, openness in communication and feel more able 'to be ourselves' with others
2. Once these basic conditions are achieved, a multi-voiced and multi-perspective **Group Dialogue** begins
3. This rich environment provides the conditions that foster innovation and **Creative Working** (creative synergy)

Clarity and Confidence

Power and control

A key feature of matrix structures is the balance of power and control in the organisation. In a Functional matrix, the power lies with the Function managers and in a Project matrix, with the Project managers.

When an organisation needs both functional excellence and excellent project delivery, the structure needs to balance the power between the roles. Attempts to do this can cause great confusion to those below the level of the managers concerned and be highly counter-productive.

The key is to create absolute clarity about roles and responsibilities in each part of the matrix. So for example, the head of a business unit in a country would report to the global business unit and to the country.

The country manager and the global business unit manager would jointly select the country business unit manager, jointly agree on the business unit goals in the country and jointly assess the manager's performance.



Of course this requires a high degree of cooperation and collaborative working between the two senior managers. They also have different responsibilities and areas of authority and those things need to be clearly and carefully defined and then made completely clear to the rest of the organisation.

Other things which can swing the balance of power and control include: information systems, having a voice in the planning process, reward and recognition, the authority to make decisions, and budgets.

It is important to see whether all these things are acting to balance power in the matrix, or being used as levers to give more power to certain parts of the organisation, so that the business units desires outweigh those of the countries, for example.



Responsibility Charts and the RACI Model

Fuzzy and unclear roles and reporting relationships must be eliminated for matrix working to be allowed to release its magic.

The best method is through the use of Responsibility Charts and the RACI model. A Responsibility Chart lists areas of decision making on the x-axis and the Roles in the relevant part(s) of the organisation on the y-axis. RACI lists the ways in which a Role can affect a decision:

R = Responsible
A = Approve
C = Consult
I = Inform

The individuals whose roles are listed on the y-axis define which decisions should be listed on the x-axis. They will usually be the most contentious ones around money, authority and territory.

When all the decision areas have been filled in each person then goes right through the chart allocating R, A, C or I across each row (i.e., for each decision). Any roles which are not involved in a given decision in any way at all can be given an X. Once everyone has put down their own ideas, the group needs to meet together and reconcile what will inevitably be very different ideas.

In areas where no agreement can be reached, the group, or its leader, will need to take a decision to at least trial one RACI set for that decision for a period of time and see how well or otherwise it works for all concerned.

The chart then provides clarity for all concerned, and clear decision making is a major factor in building confidence that the matrix will be an effective way of working and not a muddle of different authorities.

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