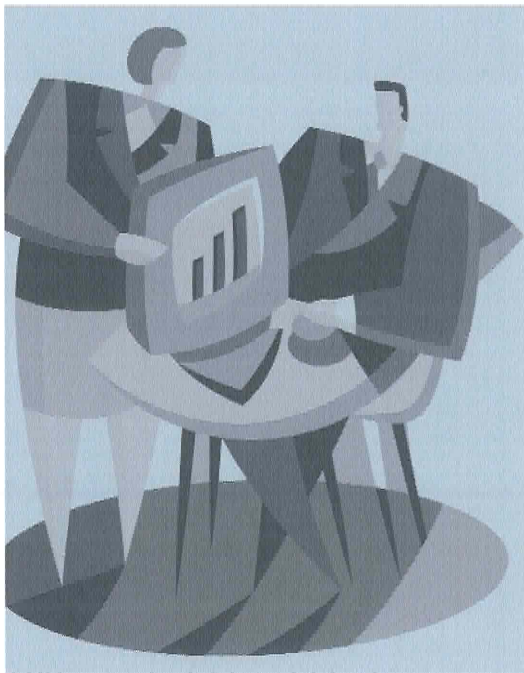


Learning to Share

How to Meet the Demands of Joint Leadership



With the ever-increasing scope and complexity of today's organizations, shared leadership makes sense strategically. Yet many people who are cast into a role of shared leadership find it unnatural and are uncertain of how best to approach it. Here are some tips from two leaders who have been there, done that, over the past several years.

More and more people in organizations are finding themselves in leadership roles in which they share leadership responsibility. For example, two individuals might co-manage a major project, or two individuals from two different organizations might be asked to co-lead an organizational joint venture. Major corporations such as Ford, Hewlett-Packard, Boeing, and Citigroup have been led by people who shared top leadership responsibilities.

Shared leadership makes sense as a strategy for dealing with the scope and complexity of today's organizations. The traditional way to deal with scope is to add layers of management. With shared leadership, coordination and cooperation among units is achieved by making such

interaction the responsibility of the unit leaders—not by adding another level of management. Also, as the work of diverse units in an organization becomes more interdependent, it's unrealistic to expect one leader to have all the capabilities needed to manage the resulting complexity. Managing complex organizational systems can be enhanced by applying the expertise and perspectives of more than one organizational leader.

For several years the authors have been managing in a context that calls for shared leadership. Together we are responsible for the research and educational activities at CCL. This is a diverse set of activities—behavioral science research, classroom training, one-on-one coaching, designing customized development programs for

by Cynthia D. McCauley and Lily Kelly-Radford

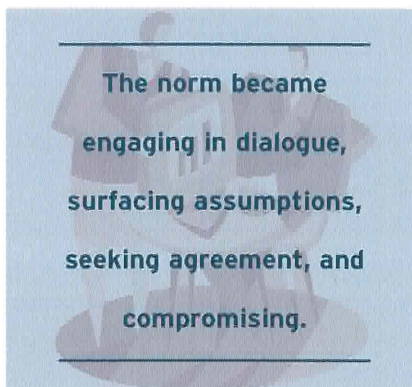
clients, selling assessment products, licensing CCL programs, publishing, and developing new programs and services—all of which are interdependent and thus need to be managed as one system. This system generates more than \$50 million in revenue each year and has about 150 faculty and staff members. Individually we manage separate groups in this system, each of which is led by a group director. However, the groups cannot operate independently because they share staff and other resources, each group's work has an impact on the other groups, and projects often need the efforts of multiple groups and common enterprise resources. When it comes to dealing with issues such as the overall philosophy and strategy for the research and educational activities at CCL, the way shared resources will be used, the processes for managing decentralized activities, and the policies that govern the work in our groups, the two of us have to act as one leadership unit. So, for us, shared leadership means sharing responsibility for a system of interdependent groups. It does not mean taking turns in a leadership role, nor does it mean job sharing. In our particular context we are operating as a dyad, but perhaps shared leadership could also be carried out by a larger team. The strong sense we have of what it means to be "sharing responsibility for a system of interdependent groups" might be best illustrated by what happens when one of us is asked by someone outside CCL to describe her role. We both find that we can't describe the role without explaining all the groups in the system we jointly manage, which groups we are individually responsible for, and how they are related to one another.

STARTING FROM SCRATCH

In the beginning we weren't quite sure how we would go about sharing

leadership responsibility. We didn't have any experience of our own to draw from, nor did we have any role models. We had to experiment and make joint learning intentional. We quickly learned that working in this way is demanding.

First, as with any kind of partnership, we learned that unilateral deci-



sions and actions would be rare. Instead the norm became engaging in dialogue, surfacing assumptions, seeking agreement, and compromising. We found that this way of working together not only took time and focused attention but also required developing a greater awareness of our own beliefs and practices and the ability to articulate them and examine them with the other person. For example, in exercising oversight responsibility for our faculty compensation system, we discovered that we operated out of somewhat different belief systems about what constitutes "fairness" in such a system and about what should motivate people. It took numerous conversations to discover and better understand our differences, and even more time to find ways to integrate these views. Even when making decisions or taking action within a group that was the responsibility of only one of us, each of us had to think about the implications for groups that the

other one manages—because of the interdependencies among our groups.

Second, we found that shared leadership work is demanding because it runs counter to the natural tendency in U.S. organizations to strive for individual achievement. People's identities and self-esteem are largely built on what they have accomplished as individuals and on developing competencies that differentiate them from others. We found that there are fewer opportunities for individual achievement in a shared leadership situation. Many of our achievements are joint achievements. And even when an outcome is achieved primarily by one of us, others either assume that we worked together or feel that it is more appropriate to recognize us equally. Although this has come to feel more natural over time, it has sometimes been difficult to find the right balance between differentiating oneself as an individual and being part of a partnership.

ABOUT THE AUTHORS



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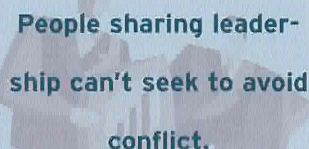


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FRUITS OF EXPERIENCE

Our efforts to learn from our experience have yielded insights about how to effectively practice shared leadership. We offer the following advice for those entering into or contemplating a shared leadership position.

Develop the Relationship. To act effectively as one leadership unit, the two leaders need a strong connection between them. A strong relationship is developed, first, by working to understand and value each other. This includes understanding each other's



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strengths and weaknesses, valuing the strengths, and accepting the weaknesses without trying to change the other person. It also includes understanding each other's perspectives, being open to—and even trying on—the other's perspective. A deeper appreciation for the other is enhanced when each person is open about his or her weaknesses and biases, and when views are expressed without trying to convince the other of the “correctness” of these views.

One thing we learned to be particularly open about was our fears: What are we afraid might happen to the groups or the work each of us is responsible for? What are we trying to prevent from happening? What are we afraid to let go of? About a year into our new roles, we realized that some restructuring was necessary to make the system work more effec-

tively and to make the work experiences of our staff less chaotic. But as with any kind of restructuring, there were lots of opportunities for fear—for example, fear that something one of us valued would be seen as less important in a new structure, concern that key people would lose motivation because of the change, and worries that one group would end up bearing more of the hard work than others. We started the discussion of how to restructure by describing what we feared might happen in a restructuring. This discussion unburdened us, creating a sense of shared responsibility for designing the new structure in such a way that each of us minimized her own fears and invested in minimizing the fears of the other.

How conflict is dealt with is another indicator of the strength of the relationship. People sharing leadership can't seek to avoid conflict. Conflict needs to be surfaced and dealt with. For example, we found that there is nothing like a shortage of resources to bring out conflicting priorities. Early on in our tenure, we faced a shortfall in revenues. We had to oversee decisions about how best to use existing staff resources and cut expenses. Naturally, in trying to prioritize, each of us was initially most focused on the needs of her own group—an approach that isn't necessarily best for the system as a whole. But it did bring out our differences and forced us to make choices together. When we faced the same problem following the terrorist attacks of September 11, 2001, we already knew what conflicts to anticipate, so that cut down on the time it took to realign priorities. Our previous choices also influenced new approaches as we moved forward.

Develop Routines for Sharing Work and Responsibility.

Engaging in shared leadership can be quite cumbersome if the people involved have to be constantly check-

ing in with each other. Over time we developed shared assumptions about how joint work would get done. This created efficiency and a sense of productivity—outcomes that we both valued. Some of the routines that need to be established involve

- *The work flow.* How does the work get divided? Who is on point for what issues? What work is best done together? When will handoffs occur? How will work keep moving forward when one person is absent?

- *The degree of freedom each person has around individual actions.* We decided each leader should have a large degree of freedom for numerous types of actions. For example, we decided that each of us would manage her individual groups in ways that fit her own leadership style. How often we meet with direct reports, the kind of information we request from them, the latitude we afford them, and how we do performance management are examples of areas where we have had a great deal of individual discretion. However, we decided to give ourselves limited degrees of freedom when it came to major issues that needed to be consistent across groups, such as compensation philosophy, faculty management, use of client information systems, and relationships with adjunct staff. Some issues that may seem small still needed to be handled consistently for symbolic reasons. For example, we were careful to make sure that groups had equitable resources for group retreats.

- *The times when one partner can represent the other.* It was unrealistic to expect both of us to be present in all meetings or interactions with others in which issues affecting our part of the enterprise were being discussed, shaped, or decided. In fact, we soon discovered that one of the benefits of a shared leadership arrangement is that the leaders can be in two places at once. But we also

learned that the pair has to develop a good sense for when they are in agreement (and thus can easily represent each other) and when they have shared their perspectives enough that one leader can articulate that perspective in representing the other. When a decision has particularly salient consequences for a group that the other one manages, or when a new issue is encountered that the two of us have not discussed, we have found it best not to try to represent the other. In other words, we learned we can represent what we already know from our work with each other but we cannot be a substitute for each other.

Create a Sense of Shared Work and Responsibility Within the System You Jointly Manage. A clear lesson for us was that a strong connection between the two people sharing leadership responsibility isn't enough to hold a system together. Connections have to be built laterally among those leading at the next level down in the system. Developing these connections requires first articulating overarching values and goals held in common across the system. For example, we recently crafted an educational philosophy statement that articulated our approach to leadership development. The ideas in this statement were already embedded in our work, and each of our group directors could certainly describe the philosophy from his or her perspective, but articulating this philosophy in a more collective and formal way made the common values shared across groups more tangible.

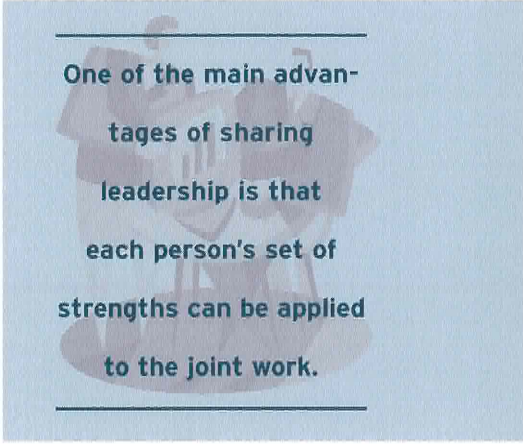
Perhaps more important, we learned that this next level of leadership has to work together to deal with complex issues. This allows them to experience firsthand the multiple perspectives that exist in the system, the cultural differences across their various groups, and the cooperation and compromise that are needed to realize the multiple goals of a complex

organization. One of the biggest tasks our group directors work on each year is a plan for allocating staff resources to various types of work. It requires them to articulate the work of their groups and understand the resources needed for that work; to understand and appreciate the resources needed to meet the goals of the entire system (not just of their group); to develop joint expectations for faculty work, development, and management; and to jointly manage shared resources.

We discovered other ways that the partnering leaders can encourage more connections across the system. Such partners can model shared responsibility, such as standing together (both publicly and privately) in support of an unpopular decision. They can model and expect of others a balance of loyalty to peers, to subordinates, and to one's boss. They can be vigilant in pointing out the interconnections among the work of various groups and expect these groups to work together at the points of connection. They can plan for regular meetings of peers who need to work together. They can create special roles that help to integrate the work of multiple groups. For example, we created two *process manager* roles, and the people in those jobs report to both of us. They work to create consistent processes within two of our most decentralized activities (open-enrollment programs and research and development) and to provide mechanisms through which each of these activities can be managed in a more integrated way.

Take Advantage of the Diversity. Another lesson for us was that each member in a shared leadership dyad has strengths and weaknesses. We came to see how one of the main advantages of sharing leadership responsibility is that both sets of strengths can be applied to the joint work.

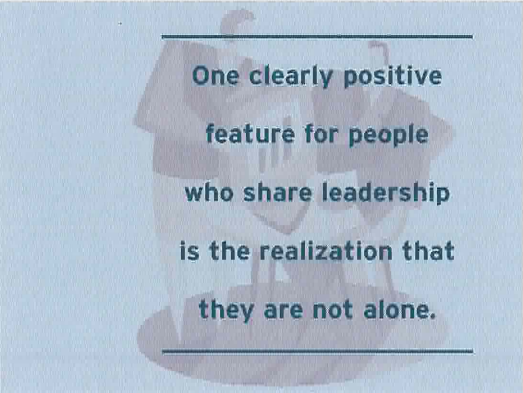
One way to take advantage of this diversity is for each person to take responsibility for tasks or activities that play to his or her strengths. There may be some initial hesitation in using this approach. If one partner takes the primary responsibility, is that person minimizing the other person's role in this particular task? Again, it comes down to productivity. Work will likely slow down if both people have to be involved equally in everything. But we learned that there is a time to reverse this approach and have the less-experienced person take the lead. This has been effective when others have come to expect one of us to take the lead on certain topics related to our experience and expert-



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ise. This expectation can make a particular perspective less noticeable. For example, people might think, "There goes Cindy talking about knowledge development again," or, "There goes Lily talking about revenue again." When the unexpected partner takes the lead, others are more likely to pay attention, and it sends the message that we are indeed united in our view on a particular issue. It is important in these cases for the messages to be authentic and thoroughly understood by the partner.

As noted earlier, sharing leadership in this way also brings a diversity of perspective to leadership work. We found that a more comprehensive approach can emerge when we allow our differing perspectives to exist side by side rather than try to choose between them (or to have our boss choose between them). For example, one of us tends to focus more on intrinsic motivators and the other more on extrinsic motivators; one thinks of how the organization can be supportive of the employees who face multiple nonwork demands and the other thinks about how employees should be able to deal with such issues on



One clearly positive feature for people who share leadership is the realization that they are not alone.

their own; and we differ in when we prefer an inductive versus a deductive approach. These perspectives and approaches don't need to be at odds with one another. They can be combined to create a more multifaceted and richer understanding of complex issues.

Let the Relationship Develop You. One thing that has become clear to us is that sharing leadership responsibility with a peer creates a unique learning opportunity. Each of us has ample opportunity to observe how the other enacts competencies that are her strengths. Our observation can be easily supplemented with direct teaching and coaching about

how we each do what we do well: for example, "Here are the steps I go through," "Here are the factors I pay attention to," and, "Here is what I'm thinking about as I do this." We also learned that we have to educate each other about our beliefs and perspectives. This not only provides each of us access to different perspectives but also deepens our understanding of our own beliefs and perspectives, because each of us has to make those beliefs and perspectives more explicit to communicate them to the other person.

In addition to learning from each other's particular strengths and perspectives, we have found that working in a shared leadership situation stimulates development in some more general ways. Each of us has developed a broader perspective on the work of the organization, is more confident in her leadership capabilities, can better engage in systems thinking, has improved some of her affective abilities such as patience and tolerance for differences, is better able to work with multiple constituency groups, and feels more comfortable with multiple allegiances. Clearly, creating shared leadership positions can also be a strategy for leader development in organizations.

Enjoy the Camaraderie. Not everything about practicing shared leadership is difficult or challenging. One clearly positive feature for us was the realization that we were not alone. We have someone with whom to share the good times and weather the hard times. We recognize how important it is to celebrate the successes we've achieved together and to reflect on what we've learned. When we see one of our group directors advocating an enterprise perspective, a cross-group project team working smoothly, or ourselves quickly tackling a thorny issue, we sometimes step back and make a point of

expressing how far we've come. We also appreciate having someone who will share the heat—whether it's due to an unpopular decision, making a mistake, or external criticism. We have come to value the relationship itself and the camaraderie it produces. One thing that will be difficult about moving on to new roles will be losing the close working relationship and the sense of togetherness that comes from it.

SYSTEMIC SUPPORT

In addition to the advice we have offered thus far, which is based on learning from our own experience, we have hypotheses about the kind of organizational context that supports shared leadership. First, the boss of the individuals has to fully support the spirit of shared leadership. This includes recognizing and honoring the diversity that each individual brings to the partnership, encouraging the partners to work out issues among themselves, and not colluding with one partner against the other or playing favorites. Second, it is easier to practice shared leadership in an organization that sets enterprise-wide goals and objectives instead of relying only on business-unit goals to drive its work. These superordinate goals provide a unifying agenda within which to work. Finally, succession planning for shared leadership positions needs special attention. Pairs of individuals should be chosen who have complementary capabilities and who can draw on different sets of experiences.

What is not completely clear to us is how best to transition into and out of these roles. Should partners transition into and out of the shared leadership roles at the same time or are there advantages to having one or more individuals be experienced in the work of the joint roles? We don't yet know the answer, but we will keep exploring it together. 