

MANAGING MOMENTUM IN LARGE ORGANIZATIONS

A Thesis

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by

Napoleon Alan Zapata

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## Abstract

A key component that few have explored is synergy for momentum, the capacity of leaders to balance leadership with structure, provide teams with resources to execute, track performance, and sustain the coalition mindset for idea implementation. In his work, Professor Samuel Bacharach suggests that momentum is critical to executing change. He argues that thriving organizational leaders that sustain momentum lead firms that can implement change.

In this thesis, I have taken Bacharach's frame in Keep Them On Your Side and the Agenda Mover, and his upcoming Innovation Volume, and I have attempted to illustrate it by giving examples of organizational change. This differs from his work in its provision of in-depth case examples for his managerial synergy constructs. Hopefully, through this application of his perspectives, the relevance/robustness of momentum will be enhanced for better organizational understanding. While this thesis is not offered as a test of theory, it is offered as an in-depth perspective illustration, an affirmation through illustration.

## BIOGRAPHICAL SKETCH

Napoleon Zapata was born in Pasay City, Philippines. At the age of 2, he and his family immigrated to the United States. Napoleon entered the Cornell University School of Industrial and Labor Relations (ILR) in 2012 and graduated with his Bachelor of Science in 2016. In August 2016, he continued his studies at ILR to pursue his Master of Science in Industrial and Labor Relations.

## Dedication

I want to thank my parents. They started the ball rolling with their initial support for my studies. They also must be given the lion's share of credit for keeping it rolling to the completion of my studies through their unwavering and unconditional support. In this sense, they are the true masters of momentum. At the end of the day, the fact is that my academic achievements would not have been possible without them.

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## Introduction:

While there has been a great deal of work done on organizational change, very few scholars have examined one of the most critical challenges of the entire change process. Many have looked at ideation and examined innovation processes, but a key change component that few have explored is synergy for momentum. This is the capacity of leaders to balance leadership with organizational structure, provide teams with the resources necessary to execute, track performance, and sustain the coalition mindset, as a means of ensuring that ideas are eventually implemented. In his work in the last number of years, Professor Samuel Bacharach has suggested that momentum is a critical concept in the successful execution of change. Specifically, he argues that leaders capable of using these four levers of momentum can successfully lead organizations that have the capacity to deal with change. These are the thriving organizational leaders that are capable of moving and adapting to the ever-changing environment.

In this thesis, I have taken Bacharach's frame as depicted in his books Keep Them On Your Side and the Agenda Mover, together with his upcoming volume, the Innovation Volume, and I have attempted to illustrate it by giving examples from various sources of organizational change. This differs from his preliminary work in that it provides a series of richer and more in-depth case examples for the various conceptual constructs and perspectives of managerial synergy that he offers. Hopefully, through this application of his perspectives, the relevance and robustness of the four momentum components will be enhanced, thus allowing us to

better understand them within the context of organizations. While this thesis is not offered as a test of a proposition or theory, it is offered as an in-depth illustration of perspective. In that sense, it is an affirmation through illustrations and examples.

In the Innovation Volume, Bacharach argues that organizations tend to fall within one of three primary types: Clunky, Myopic, and Thriving. Simply put, Clunky Organizations are those sprawling companies that are afflicted by Organized Anarchy. Looking from the outside, clunky organizations appear organized. However, Organized Anarchy is characterized by the existence of complex organizational structures, loose integration, and a schizophrenic culture.

*“Organized* calls to mind a succinctly integrated, systematically efficient social order, while *anarchy* brings up images disordered chaos, sprawl, and turmoil” (Bacharach, “Innovation Volume”). Altogether, these characteristics lead to the rise of internal fiefdoms with shifting goals, and operational units that have conflicting business models. Their clunkiness and unwieldy nature arises as a result of these traits.

Clunky organizations tend to sprawl and lack focus. They have the tendency to operate in a slow and disjointed manner, as their leaders deal with arising issues one at a time. Creativity comes naturally to them. In fact, they find that discovery- the ability to understand the next big thing and ideate- comes easy to them. However, they often find it difficult to stay with their organization’s mission. The semblance of structure and planning exist within them, but anarchy is what usually occurs under the surface. Overall, these traits result in sprawling and creative organizations with an overt sense of autonomy that lack the direction and focus to implement their agendas.

On the other hand, Myopic Organizations are those firms that are afflicted by the Blinder effect. The Blinder Effect occurs when a company has overly focused goals, extremely tight integration, and an overvalued customer focus. Together, these characteristics lead to its lack of agility and the inability of its leaders to adapt to the changing environment. Whereas their clunky counterparts lack focus and direction, Myopic Organizations have too much of it. Their leaders are characterized by their tight vision, and the stubborn pursuit of their organizational mission. As such, they are extremely adept at delivery- the ability to mobilize initial support and sustain it to implement their ideas. Like a horse fitted with blinders, Myopic Organizations see things to the end and rarely deviate from their defined path. However, this comes at the expense of contextual awareness and creativity. The result is their inability to seize the initiative by looking ahead and adapting to whatever lies in front of them. “Myopic organizations are so tightly integrated and committed to a common purpose that they are incapable of making agile adjustments” (Bacharach, “Innovation Volume”).

Bacharach argues that Clunky and Myopic Organizations are stuck. He argues that they are not reaching their potential. This doesn't mean that they can't be successful. In fact, many of them are. Some are even at the very top of their industries. However, the fact remains that they aren't reaching their maximum capacity. “They may survive, they may even succeed, but they do not flourish” (Bacharach, “Innovation Volume”). The truth is that they aren't as successful as they could be.

Simply put, their leaders lack the leadership skills that are necessary for the discovery and delivery of ideas. Faced with the organized anarchy caused by a lack of integration, conflicting goals, and confusion, Clunky Organizations find it difficult to act in a directed

manner. Although these characteristics enhance their capability to discover, they often find delivery difficult. The leaders of Clunky Organizations lack the ability to implement their ideas. Their myopic counterparts are faced with the opposite problem of the blinder effect- overly tight integration and focus. They rarely deviate from their defined path. Although adept at delivery, their leaders find it difficult to understand the environment and foster creativity. Discovery becomes their sticking point. Either way, both myopic and clunky organizations are stuck. They are not achieving the success that they are capable of.

According to Bacharach, Thriving Organizations are not stuck. Unlike their clunky and myopic counterparts, these are the nimble firms whose leaders are adept at the combination of both discovery and delivery. “They are able to seamlessly adapt to new trends and can deliver innovative solutions to customers” (Bacharach, “Innovation Volume”). Thriving Organizational leaders are agenda movers. They have the ability to read the signals and harness the creativity necessary for innovation. At the same time, they understand how to gain the initial support that is necessary to move their agendas forward and sustain it in order to ensure its execution. Forward thinking and adaptable, the resulting firms lack the sprawling bloat and almost blind focus and rigidity that characterizes their counterparts.

Thriving organizational leaders aren’t satisfied with the status quo. Instead, they actively engage in the leadership skills of discovery that are necessary to peer into the future and create the innovation that upends it. At the same time, they also understand and utilize the skills of delivery that are necessary to implement them. Managerial synergy, the subject of this thesis, is one such skill. Thriving organizational leaders are well versed in their

understanding of momentum and the managerial competence that is necessary to sustain it and implement their agendas.

Often, within clunky and myopic organizations the ball is dropped. Enthusiasm quickly diminishes and projects have the tendency to stall within them. Their leaders fail to realize that in order to keep their ideas moving forward they must have the managerial competence skills to sustain momentum. In clunky and myopic organizations, a lot of energy is spent on getting people behind an idea. However, upon attaining this initial buy-in, their leaders lack the ability to keep things moving. They can successfully convince everybody to go along for the ride, but they just can't seem to lead the project to its completion.

The ability to sustain momentum is the litmus test of the leadership skill of managerial competence. The thriving organizational leaders that do this are sustainers. These managerially aware leaders stay on top of their game, they stay one step ahead of their organization, their colleagues, their constituents, and their workers by anticipating the obstacles, dilemmas, and uncertainties that may slow down or derail their agendas. The capacity to make sure that others will stay committed to an initiative and go the distance is the true test of managerial competence. Sustainers lead and manage for momentum. They understand the fact that by keeping the momentum going, they'll keep people on their side. They also know that by keeping people on their side, they'll keep the momentum going.

While Bacharach's other leadership skill of political agility explains how leaders act as the campaigners that navigate through an organization, and initially mobilize, energize, and coalesce people around their ideas, managerial competence is the crucial skill that enables them to sustain these initiatives, move towards a goal, and keep the support necessary to

execute. Managerial competence is the ability of a leader to sustain momentum and implement.

To keep the momentum going, thriving organizational leaders provide support to the team members that keep things moving. They reduce their anxiety and indecision to minimize procrastination, and they even take the initiative to make every effort to overcome the appearance of inertia. While the leaders of clunky and myopic organizations often fail to understand these challenges, their thriving counterparts actively work towards overcoming them. As such, these organizations are able to sustain momentum and generate the synergy necessary to execute what they set out to achieve.

## Lead for Momentum

Bacharach argues that using momentum within the context of organizational teams allows it to be described through its physics definition of “mass in motion.” “The textbook definition of momentum is that everything has mass; so if an object is moving, then it has momentum—it has mass in motion” (Bacharach, “Keep Them On Your Side” 32). Here, the two variables of mass and velocity are used to calculate an object’s momentum. “This physics lesson ends with an equation- the momentum of an object is equal to its mass times its velocity or:  $\text{Momentum} = \text{Mass} * \text{Velocity}$ ” (Bacharach, “Keep Them On Your Side” 32).

Within the context of an organization, mass means that you want people on your side. The more people on your side, the greater your potential for long-term success. Velocity can be defined as your desire for your team members to remain active and focused on what needs to be done. In thriving organizations, managerially competent leaders lead for momentum

(Bacharach, "Innovation Volume"). They actively sustain momentum. In clunky organizations too much momentum exists due to the abundance of mass such that collisions and stagnation result. In contrast, within myopic organizations, the average amount of mass together with the abundance of velocity means that adaptability is constrained and that momentum is lost when project adjustments inevitably have to be made. Here, team members tend to be so focused that they simply cannot adapt quickly enough to make the changes necessary to keep their momentum and execute upon their agenda. The leaders of thriving organizations know the right balance needed to have the momentum necessary to avoid collisions and adapt to the changing project environment, yet successfully execute and achieve their goals.

There are several dimensions that define momentum. The first is the balancing of leadership and organizational structure. Thriving organizational leaders understand how to balance directive and facilitative leadership by pursuing the middle ground of giving their teams the vision to execute, while handing them the autonomy to do so in the most efficient manner possible. They also understand the differences between hierarchical and team based arrangements, together with the most efficient combinations of leadership style and organizational structure. Their success is based upon their ability to balance the two primary combinations by utilizing aspects from each.

The second dimension of momentum is the ability of leaders to enable teams by providing them with the resources that they need to execute. "In sustaining momentum the question you must answer is how many resources should you provide to people" (Bacharach, "Keep Them On Your Side" 85). Sustainers know when and how to give people the resources and the capacity that they need to go all the way. They are also able to implement the

standardization and resulting efficiency of routine without going overboard and lessening employee engagement.

The next dimension of momentum is the ability of leaders to maintain the direction necessary to monitor team performance and remove the obstacles that are blocking success. They also know how to make corrections without stalling their initiative and creating inertia. “Managerially competent leaders maintain momentum for their initiative by making evaluations and, in turn, making adjustments based on those evaluations” (Bacharach, “Keep Them On Your Side” 101). Such Leaders place an emphasis upon achievement and evaluation. They make adjustments but don’t overreact.

This is followed by sustaining the commitment of team members through their constant recognition and the appreciation of their efforts to celebrate short term wins. Sustainers understand how to use culture as a tool for motivation and control. They place an emphasis on the culture of their team, where its cohesiveness and social psychological mechanisms, like peer pressure, have the effect of sustaining projects to completion. They create a problem-solving culture, without making the mistake of processing things to death. They pump up the collective, without forgetting the individual.

The final dimension of momentum is sustaining the coalition mindset. Sustainers understand the importance of coalitions. They also understand how to keep the coalition mindset from slipping away. “Coalitions lose focus when alternatives emerge, outside pressures are exerted, and people become exhausted” (Bacharach, “Keep Them On Your Side” 150). Among other actions, they reinvigorate the vision, reinforce the benefits, sustain optimism, and maintain credibility. In short, they do everything in their power to keep the



team spirit alive. Doing so enables them to execute upon their ideas regardless of the myriad of challenges that they routinely face.

Thriving organizational leaders share a thorough understanding of these dimensions. They adapt to situations and apply these different components of managerial competence to sustain momentum. To lead teams in the most productive manner possible, **Sustainers balance leadership and organizational structure**. To allow people to perform to the best of their ability, **Sustainers enable teams**. To keep track of progress and make adjustments, **Sustainers maintain direction**. To motivate their team members, they **sustain commitments from others**. And finally, to retain political momentum, **Sustainers keep the coalition mindset**. Clunky and Myopic organizations move from one extreme to the other. Their leaders are unable to maintain the right balance of each aspect of momentum. In contrast, thriving organizational leaders know how to maintain the right balance of each component, thus allowing them to sustain momentum.



## Figure 1 Synergy for Momentum Model

### Balanced Leadership and Organizational Structure

#### Directive Leadership

According to Bacharach, two types of leadership styles are commonly used when dealing with the various dimensions of momentum in order to execute agendas (Bacharach, “Keep Them On Your Side” 56). He goes on to argue for the existence of two primary organizational structures that are commonly used within today’s firms. Taken together, two optimal combinations of leadership style and organizational structure exist. Each of these have their own strengths and weaknesses. Unlike their clunky and myopic counterparts, Sustainers are uniquely able to balance both combinations. They understand that the sole use of one at the expense of the other brings out weaknesses that are disadvantageous to the organization as a whole. As such, they work to balance both combinations within their firms. Thriving organizations are led by leaders that are able to do this the best.

The first leadership style is Directive Leadership, the approach that places an emphasis upon control, direction, and accountability. Directive leaders believe that efficiency, and ultimately project completion, is best fostered through a clear breakdown of responsibility. “Tell them what you want, how to do it, and when you want it done” (Bacharach, “Keep Them On Your Side” 56). Managers have the responsibility to manage, while employees are tasked with actually executing their assigned deliverables.

These leaders control the course of a project by providing their team members with a roadmap of what to do, keeping track of their progress, and holding everyone accountable for their specific responsibilities and goals. “Embedded here is the notion that in order to sustain

momentum, people cannot simply be motivated, but that they must be driven, directed, supervised and pointed toward the organizational objectives” (Bacharach, “Keep Them On Your Side” 59). Directive leaders are fairly easy to spot- they are the types that prefer a controlled do it by the numbers approach to execution.

Apple is a prime example of an organization whose leaders actively practice directive leadership. Here, control and efficiency are exerted to their utmost, while accountability follows closely behind. Steve Jobs enforced the directive leadership and centralized control of Apple project teams through his creation of the DRI system. “It stands for Directly Responsible Individual, and it is the person who will be called on the carpet if something isn’t done right” (Lashinsky, p67). There is a DRI for everything at Apple. Essentially, this system is structured to foster efficiency and control- the appointed DRI is solely responsible for whatever deliverable he happens to be listed for. Only he is calling the shots- the one person responsible for its success or failure.

By naming a leader, and by holding him liable for the success or failure of a specific deliverable, Jobs insured that the DRI executed it as effectively as possible. From leading the team tasked with releasing the newest update of the company’s IOS operating system, to typing up meeting notes, the DRI system fostered the efficiency and tight control of almost everything at Apple. The only alternative was the loss of the DRI’s job. Additionally, it also introduced the positive by-product of personal accountability. From the highest executive, to the newest employee, the DRI was always held responsible for the deliverable assigned to him. To this day, the DRI system exemplifies the extent to which Apple’s leaders practice directive

leadership. It ensures that control and efficiency, together with personal accountability, are Apple norms.

Although Directive Leadership effectively promotes project efficiency and execution, this leadership style does have its weakness. Specifically, Directive Leadership promotes efficiency, accountability, and execution at the expense of flexibility. “What if things fail to go according to plan and no one adjusts or changes the plan?” (Bacharach, “Keep Them On Your Side” 61). By their very nature, projects change and goals ultimately shift. Sometimes individual team members are forced to make a split-second decision. Directive leaders must not forget that flexibility is a requirement of keeping up with day to day change. The very success of their leadership approach depends upon it.

### Facilitative Leadership

The necessity of flexibility as a means of responding to the reality of constant change and innovation leads into the second type of leadership- Facilitative Leadership. This approach places an emphasis upon problem solving, and innovation. Unlike their directive cousins, facilitative leaders believe that project completion is best fostered by enhancing the ability of their team members to make decisions when faced with uncertainty. “You want people to feel confident in their ability to adjust the plan in such a way that they won’t be trapped in inertia, or put in place a radical variation of your intention that is no longer recognizable to you” (Bacharach, “Keep Them On Your Side” 62).

Instead of focusing on accountability and control, facilitative leaders emphasize a more fluid problem-solving based approach. Uncertainty does not faze them as they take the initiative to maximize the ability of their teams to adapt and respond to change rather than

merely attempting to predict the future. “Unlike directive leaders, who assume that only small groups have power, facilitative leaders distribute power more broadly (although the power is generally not distributed equally or evenly)” (Bacharach, “Keep Them On Your Side” 65). This is done not only by themselves embracing flexibility, but also by empowering their individual team members to take whatever action is necessary at that moment.

Tesla exemplifies an organization whose leaders actively practice facilitative leadership. Within it, all the ingredients of this leadership approach are present. It all starts with the type of employees recruited by the company. As a general rule, Tesla only recruits the best problem solvers in the world. During their interviews, candidates are first asked to recount examples of personal achievement and problem solving skill. Tesla leaders then push them for an in-depth analysis and explanation of exactly how they were able to accomplish whatever it was that they had attempted to do or solve. “Elon doesn't settle for good or very good. He wants the best. So he asks job candidates what kinds of complex problems they've solved before and he wants details” (Dyer and Gregersen, Forbes).

Bonuses and promotions are also tied to problem solving capability as well. Every employee is ranked on a 1-5 rating, with 5 being the highest rank. Getting a 5 is no easy feat- problem solving is a strict requirement. At Tesla, the same is true for its offspring- innovation. It's not enough for top ranked employees to conceptually understand the problems at hand. Tesla leaders are unique in that they expect their best and brightest to take the initiative to solve them through the creation and application of their own personal innovations. “It has to be significant in the case of phenomenal, something that makes the company better or the product better” (Musk, Forbes). By rating every employee on this system, the bedrock of

facilitative leadership is set as problem solving and innovation have become solidified Tesla norms.

Finally, Tesla leaders promote a culture that combats uncertainty and the possibility of failure through an emphasis on employee communication, and quick adjustment. “Learning in an environment of uncertainty requires a willingness to admit mistakes and move quickly rather than digging in and doing nothing for fear of admitting failure” (Dyer and Gregersen, Forbes). Instead of attempting to predict the future, and dictating the proper method of achieving it, Tesla leaders empower their team members to communicate and quickly adapt to the changing realities of their project. This is best exemplified by their approach to designing the Tesla S. “[Chief Designer] Von Holzhausen was able to design the award-winning Tesla S with a team of just three designers sitting next to their engineering counterparts. Bigger automakers typically have 10 to 12 designers working on each new model” (Dyer and Gregersen, Forbes). Communication and flexibility are the key. Clearly, this combination has led to a successful facilitative leadership approach within a company that many argue should not have succeeded.

Although Facilitative Leadership promotes the ability to respond to the fast changing uncertainties of today’s projects, it also has its weakness as well. Specifically, the leaders that subscribe to this approach tend to ignore the time consuming and steady realities of project execution. Flexibility and adaptability are useful to an extent. However, too much of these may result in the inability to implement. Compared to their directive counterparts, facilitative leaders may appear to be spinning in circles due to their broad focus and adaptive tendencies. At the end of the day, a single direction has to be agreed upon, and final decisions have to be made. Problem solving and bouncing back and forth between changes may spark creativity, but

they won't get the job done. Instead, the combination of direction, control, and accountability of Directive Leadership actually will.

### Taking the Middle Ground- Leadership Approach

The main takeaway of this section is the fact that leaders should aim for the middle ground. Regardless of the project, leaders are presented with the daily choice of either Directive or Facilitative Leadership. Clearly, each approach has its own set of advantages. Those within clunky and myopic organizations tend to restrict their choice to the application of either one or the other, thus leading to the various problems associated with each organizational type. In contrast, thriving organizational leaders choose to incorporate and balance the elements of both leadership approaches. Doing so allows them to take the initial steps necessary to sustain the momentum needed to execute their agendas.

Sustainers understand that they need to balance their emphasis on control, direction, and accountability with that of flexibility, problem solving, and innovation. They understand that combining the various aspects of directive and facilitative leadership is the primary means of doing this. Although their presentation within this section may seem to depict both leadership approaches as polar opposites of each other, the truth is that they are merely two sides of the same coin. Clunky and myopic leaders may find some success in attempting to solely use one or the other. However, balancing both approaches enables thriving organizational leaders to routinely sustain the momentum required to execute their agendas.

### **Hierarchical vs. Flat Organizational Structure**

Together with understanding and balancing the aspects of Directive and Facilitative leadership, Sustainers are also able to define the power and communication relationships within

their firms. Sometimes projects just fall apart and momentum dies out because no one is quite sure who is in charge. This can be seen in Clunky organizations where there are too many chefs in the kitchen. Since everyone is responsible, no one effectively takes responsibility. In contrast, Myopic organizations may face a problem at the other end of the spectrum. They may be too tightly coupled and over-reliant on one person. Here projects may fall because one person is responsible for too much and never has the time to make the necessary decisions.

Having too many people in charge may lead to the creation of fiefdoms and the momentum-killing turf battles that often result from them. To minimize the appearance of turf battles, and avoid getting the initiative trapped, leaders have to deal with the issue of organizational structure. They also have to ensure that it is tailored to fit their specific leadership style- either Directive or Facilitative Leadership. The most successful leaders understand the organizational structures that they are working within. They then take the initiative to adjust their leadership style accordingly.

Generally, the two primary organizational structures that exist are those that are hierarchical, and those that are team based. A hierarchical structure sustains momentum by maximizing control and placing an emphasis on predictability, consistency, and accountability. "It is clear who makes decisions, who is in charge, and what's what (Bacharach, "Keep Them On Your Side" 87).

Control in the form of coordination is the key. Simply put, hierarchical structures have this feature purposefully built into their systems. The organizational leaders that utilize them believe that the primary function of the chain of command is to keep things moving. As such, hierarchical structures are designed with a top down hierarchy in place so that everyone has a



specific job and knows exactly what it is. “On your watch, when the hurricane hits, everyone knows where to turn, and when the patient needs help, everyone knows the final responsibility is with the physician on call” (Bacharach, “Keep Them On Your Side” 89). Because everyone knows what to do, their leaders can effectively coordinate the completion of the various deliverables assigned to each team member. Leaders must understand that the success of the hierarchical structure depends directly upon their ability to effectively do this.

After reading the description above, you probably guessed that hierarchical structures are best suited to leaders who practice Directive Leadership. “You put a hierarchical structure in place when you have a need for tighter control and direction” (Bacharach, “Keep Them On Your Side” 78). After all, both share a similar emphasis upon direction and control, with accountability being the means of achieving them. Hierarchical structures put in place a hierarchy that specifies the exact roles of the members of a team. When combined with Directive Leadership, these structures enable the existence of the type of environment that allows for efficient and controlled project execution. Clearly, hierarchical structures create a great combination when matched with Directive leaders.

In contrast, team based structures sustain momentum through activity clustering and the elimination of hierarchy. Team-oriented leaders see the benefit of communication, collaboration, and the placement of similar activities together. Essentially, they opt to replace specific individual roles with a team approach- groups of employees that are in the pursuit of a common goal. “They believe that the people closest to a particular problem are the ones best suited to make decisions to resolve the problem and sustain momentum” (Bacharach, “Keep Them On Your Side” 91).

Grouping is the key. Instead of hierarchy, the leaders that subscribe to this structure arrange their teams so that they work closely together and are in close proximity to one another in order to create their own sense of internal momentum. By eliminating hierarchy, and allowing teams to have the autonomy to make decisions, the team based structure enhances flexibility, problem solving, and the propensity of successful innovation. R&D organizations, sales organizations, and start-ups often utilize these team-based structures to allow their firms to explore the wide latitude of unfolding opportunities.

A lot of startup organizations are adopting these flat team structures to reduce bureaucracy and react quickly to changes in the market. As a result, their reporting structures are generally more ambiguous, and coordination has become subtler. Although these structures generally don't emphasize coordination, their leaders would do well not to forget it. After all, as a general rule coordination sustains momentum and gets things done.

Within these firms, communication networks are constantly changing. While team based structures allow people to act in a dynamic and collective manner, they sometimes get caught up within the interpersonal micro-politics of who really is in charge. As such, the lack of effective coordination may make it almost impossible to move anything ahead. If anything, the challenge and overall importance of taking the initiative to coordinate increases within them. Although their hierarchical counterparts build it into their system, team based structures do not. Instead, they are reliant upon the ability of their leaders to take the action necessary to integrate the various activities of their teams.

Due to their shared emphasis on flexibility, problem solving, and innovation, team based structures are best matched with facilitative leadership. "A... facilitative leadership style will

organize not around the image of hierarchy, but the image of groups or teams” (Bacharach, “Keep Them On Your Side” 80). By opting to organize employees into teams that are chasing after a common goal, these structures enhance their collective ability to adapt in order to solve the problems at hand. As such, they boost their propensity to innovate. When combined with Facilitative Leadership, their inherent flexibility is further enhanced as problem solving becomes even more driven by the leader himself. In this way, team based structures create a great combination when paired with Facilitative Leaders.

### [Taking the Middle Ground of Leadership Approach + Organizational Structure](#)

Thriving organizational leaders understand the need to balance each of the two optimal combinations of organizational structure and leadership style as a means of sustaining momentum. They understand both their limits and the corresponding weaknesses that arise from their sole reliance. Although they pair well together, opting to solely use the combination of Directive Leadership and hierarchical structure can result in rigid decision-making and inflexibility. Essentially, this combination trades adaptability for project execution.

Similarly, an over-reliance upon Facilitative leadership and team structure can result in anarchy and indecision. Here, project execution is traded for flexibility. Sustainers are able to balance both combinations. As such, they are able to gain the project execution capability of the first pairing, together with the flexibility and innovative capability of the second. Thriving organizations are led by those leaders who are able to do this the best.

### [Apple- Balancing the Optimal Combinations of Leadership Style and Organizational Structure](#)

Apple is an example of a thriving organization whose leaders have succeeded in doing this delicate balancing act on a day to day basis. In terms of the initial combination of Directive

Leadership and hierarchical structure, the first component once again occurs within Apple's DRI system and its emphasis upon efficiency and accountability. The company's hierarchical structure can be seen within its norm of an existing, yet unspoken hierarchy. Apple is unique in the fact that there are no organizational charts. That said, an unspoken hierarchy does exist within it.

At the very top are "The industrial designers... as were, until his death, a tiny group of engineers who had worked with Steve Jobs for years, some dating to his first stint at Apple" (Lashinsky, 42). Below them, status and importance shifts depending upon product popularity, with IOS software engineers next in line. They are followed by employees within iTunes, iCloud, and Apple's various other online services. "Employees associated primarily with the Macintosh, once the cocks of the roost, were considered second-rate in the Apple hierarchy... (Lashinsky, 42). The remaining corporate functions- sales, HR, customer services, and finance aren't even considered within this informal structure.

Although it may seem trivial to the naked eye, the implications of this informal hierarchy are in fact far reaching and very real. Stemming from their top position, industrial design is always the first consideration at Apple. The majority of firms start their product planning with the other corporate functions. Only later, upon their near completion, are these plans handed to design. "The process is reversed at Apple, where everyone else in the organization needs to conform to the designer's vision" (Lashinsky, 54). Essentially, this means that Finance, marketing, HR, and engineering- all the remaining functions- conform to the initial vision of Apple's designers. As a result, the company's products are first known for their beauty before anything else.

The implication of the product planning process is clear- the average Apple industrial designer holds a far greater degree of responsibility than his peers within the other functions. In many ways, the direction of his work determines that of the remainder of the firm. In this way, Apple's unspoken ranking system fulfills the primary purpose that a hierarchical structure places upon a chain of command- both responsibility and accountability are made clear. Everyone knows that the initial onus of responsibility lies with the company's industrial design team. They also know that everyone else's responsibilities come second, and that they are accountable for fulfilling the design team's initial vision. Altogether, the combination of Apple's Directive DRI system, and its informal yet influential hierarchical structure, results in an organization that emphasizes control and project execution first.

The potential rigidity and inflexibility of the above combination is balanced by the attempt of the company's leaders to pair Facilitative Leadership at the highest level with a team based structure tailored for the most innovative projects. At Apple, the Executive Team (E.T.) practices Facilitative Leadership during its weekly product review meetings. "This ten-member group, including the CEO, comprises the heads of product marketing, hardware and software engineering, operations, retail stores, Internet services, and design, all of whom directly have a hand in Apple's products" (Lashinsky, 71). Its primary purpose is the coordination of the company's actions and the execution of its business level strategy. In part, the E.T. accomplishes this through the weekly review of all Apple products. Due to the company's practice of focusing only on a few devices at a time, the E.T. is able to accomplish a full product review over only two weekly meetings.

During these product review meetings, Facilitative Leadership occurs through the E.T.'s emphasis upon utilizing a problem solving and collaborative approach when making decisions. Official rank doesn't matter. Instead, the members of the E.T. see each other as equals and actively work together to solve the problems that inevitably pop up as projects move to completion. At the same time, they actively debate the pros and cons of taking specific actions. In this way, decision-making occurs in a facilitative manner. Instead of implementing a concrete set plan, the members of the E.T. adapt to daily uncertainty by collaborating with one another to make the best possible decisions. This occurs in stark contrast to the Directive Leadership approach that is almost solely utilized throughout the remainder of Apple.

In contrast to its influential unspoken hierarchy, Apple also utilizes a team based structure primarily when organizing its innovative teams. Once again, Apple's leadership approaches the call for innovation by placing their top employees on teams that are created solely to innovate. The interesting aspect is the dramatic structural shift away from hierarchy, and its resulting change in emphasis. Placement into one of Apple's teams is based not upon position or product affiliation, but talent alone. Only the best are chosen for these special innovation assignments. They are given all the resources that they need to innovate. Additionally, the normal controls of hierarchy and its corresponding emphasis upon accountability and execution are taken off. Instead, the members are placed in close proximity with one another and are actively encouraged to collaborate and experiment together. Even failure is encouraged as well. In fact, here it is seen as a necessary by-product of innovation.

At this point, it's worth mentioning that very few Directive and hierarchical companies are able to do this. It's uncommon for them to have leaders who have the ability to suspend the

controls that commonly govern day to day work as a means of encouraging the flowering of innovation. Apple is unique in that its leadership has this capability. When pursuing innovation, they can turn the controls on and off, almost like a lightbulb switch.

Further supporting the team based structure of these innovation teams, and the company's quick decision making turnaround, is its lack of bureaucracy. Apple is organized by function, with the function heads overseeing teams of various sizes that are directly under them. This organizational structure may sound mundane. However, it becomes impressive when one considers the fact that less than a hundred Apple VPs are personally in charge of leading every single team within the organization. "Apple's organizational chart is so tight- approximately seventy VPs for a company with just over twenty-four thousand non-retail employees- that its bench is relatively shallow" (Lashinky, 79).

This lack of bureaucracy was a conscious decision on the part of Steve Jobs. Seeing the stagnation and indecision brought upon by the bureaucratic bloat installed into Apple during his years in the wilderness, Jobs worked to ensure that it was kept to the bare minimum. "The small number of vice presidents, typically reporting directly to members of the executive team, means that the CEO can see the entire company with one degree of separation" (Lashinsky, 79).

In this way, the combination of high level Facilitative leadership with the focused implementation of a team based structure, and the lack of bureaucracy, creates an organization that places an emphasis upon flexibility, problem solving, and innovation. As such, its leaders are able to use these characteristics to balance the inherent weaknesses of Apple's otherwise rigid Directive Leadership and hierarchical structure. Clearly, Apple is a thriving organization. If

this were not the case then its leaders would lack the ability to sustain momentum by balancing the two optimal, yet opposing combinations of leadership style and organizational structure.

## Enabling Teams

Bacharach argues that a common mistake that leaders make is their failure to sustain momentum by not giving people the capacity to push forward. This is especially true when attempting to keep things moving. They are ready to put their initiative in place and everyone agrees that it is a good idea. However, this is not enough. Their teams need to have the ability to drive their efforts forward. Organizational leaders need to consider what resources will be necessary. At the same time, they also need to take the time to consider who will do what, and how they will actually do it. Sustainers understand what their employees need in order to get their jobs done, and how they will distribute resources to their teams. They then take the initiative to empower them in order to execute their agendas.

Essentially, sustaining momentum by enabling teams is about how leaders are able to provide people with the capacity to carry out their tasks. Capacity means giving people the appropriate resources, roles, and activities that will allow them to deliver on their responsibilities. If people don't have the right resources, if they aren't sure what they are and are not responsible for, and if they don't know how much autonomy they have in their job, then they will constantly be bottlenecked and slowed down. Momentum will falter, and their projects will never be completed.

## Balancing Resources



Thriving organizational leaders understand that sustaining momentum requires that they know what resources are required to execute their agendas. People get discouraged and frustrated if they feel that they don't have access to the necessary resources. As such, they will not be likely to sustain momentum. Contrary to popular belief, allocating resources is not a simple task. Different people may have a different perception of the required amount.

A Clunky organization involved in many different programs and initiatives may go overboard during the initial resource allocation phase. Not only will this result in inefficiency and high costs, but it may also diminish momentum. As a general rule, the more resources the more complexity and bureaucracy is present within a firm. "While you think you are facilitating momentum, all you're doing is creating the type of inertia and procrastination that is associated with the worst nightmares of a welfare state" (Bacharach, "Keep Them On Your Side" 87). On the other hand, a myopic organization may have a very narrow scope, and hence a very limited set of resources. "You can starve an initiative in the name of cost consciousness or conservation" (Bacharach, "Keep Them On Your Side" 87). This environment may also wane enthusiasm, as employees begin to feel that they lack the proper tools to accomplish the task at hand.

The leaders of thriving organizations appreciate the fact that providing the right resources to employees implicitly conveys the message that they actively support their efforts. Employees will be more satisfied and motivated by knowing that they can focus on getting their work done rather than spending the time required to get approvals for whatever it is that they happen to need. That said, thriving organizational leaders are adept at knowing how much is too much. In some cases, a strategy of resource-starvation works well as employees are forced to create better and more cost-effective solutions than they would otherwise have if they were simply given a

blank check. The most effective leaders understand how to challenge employees through resource allocation without actually discouraging them.

Amazon has incorporated 'frugality' as one of its leadership principles. The premise is that 'frugality breeds resourcefulness, self-sufficiency, and invention'. While Amazon has been one of the most innovative organizations in recent times, its culture promotes 'resource starvation' as a means of challenging employees to become more even efficient. However, a recent story of Jeff Bezos highlights his flexibility and willingness to make all resources available when the situation required it. Working on the Kindle required many years to build the right hardware in order for the e-reader to succeed. "When one finance executive asked how much he was prepared to spend on the project, the CEO shot back: How much do we have" (Forbes, Anders).

His response shows that Amazon leaders are able to balance resource frugality with abundance. Generally, frugality is used to encourage people to think creatively and control costs. Since flying business class does not add any value to customers, Amazon's frugality leadership principle holds here. However, since the Kindle was a novel product with the potential to revolutionize the company, Amazon leaders were willing to provide all the required support. Clearly, Amazon exemplifies a thriving organization where leaders facilitate what employees need, yet at the same time scrutinize what they merely want.

To sustain momentum and enable people, Sustainers also consider how people will work. Routinized work processes are a common method of sustaining momentum in manufacturing and other production focused organizations. The routinization of work processes provides clarity by breaking up complex tasks into more well-defined and simplified tasks. "As such, employees working in organizations with a simplified approach tend to be more focused on carrying out

well-defined tasks” (Bacharach, “Keep Them On Your Side” 93). However, it may also lead to a sense of monotony within them. As people continue to do the same tasks over and over again, they may find the work uninteresting, thus resulting in the fading of momentum.

Defining specific tasks only works when an organization knows exactly what has to be done. Essentially, firms that aspire to be innovative are in fact exploring areas that are by their very nature novel. As such, their leaders don’t yet know the exact steps that are required to execute the innovative project. In this case, organizational leaders would do well to facilitate problem solving-oriented processes that provide execution autonomy to their employees. Innovative projects require employees to assess situations quickly and to act in a way that adapts to their changing environment.

### Defining Work Processes

In Keep them on Your Side, one of Bacharach’s primary arguments is that sustaining momentum requires leaders to define work processes based upon the unique needs of their organizations. A problem solving approach in a manufacturing process will reduce efficiency as employees take the time to explore different methods instead of following standardized procedures. On the other hand, asking them to follow specific tasks within an innovative environment that requires the freedom to explore different ideas will hinder their ability to discover and innovate. In the end, this approach will lead only to frustration.

Spotify is a company that has effectively adopted a flat structure while defining the level of autonomy that employees are allowed. Spotify is transforming the music industry. It allows people to find and play almost any song at any time. Although it has been around for only 6

years, it has over 15 million active users. The company has been growing quickly and its leadership has taken the initiative to remain agile at the same time.

Spotify's leaders have adopted a flat structure while defining communication flow, together with how work will be done. "To explain, Spotify splits its teams up into very small ones, that own a certain part of functionality end to end" (Hardy, Full-Stack Agile). The company has divided up its business into small clusters called 'squads'. Each squad focuses on a specific function and runs like an individual startup. At the same time, they each have complete responsibility over their area of work, everything from design to deployment. This autonomy allows the squads to bypass the various layers of management bureaucracy, thus allowing their 8-member decision-making bodies to quickly make decisions and release updates at a fast pace. This structure allows Spotify to remain agile by enabling employees to feel a sense of ownership and excitement about having the freedom to create and quickly implement their new ideas.

However, the autonomy is not absolute. The squad's decisions must align with the quarterly long-term goals and product strategy of the firm. Through this system the organization has provided autonomy to employees while simultaneously defining the parameters within which they need to work. While each squad functions relatively independently, they are not completely independent from their squad peers. Often, different Squads working in related areas connect with each other through demos, hack-days and get-togethers so that employees can share ideas and learn from each other. In this way, Spotify's structure provides employees with flexibility, while ensuring that they are kept connected with others within the organization. As a result, employees have a common understanding of where the organization is going. They can also align their activities accordingly.

Going back to Nordstrom, the high end fashion retailer has made a name for itself throughout the years by virtue of delivering excellent customer service. Nordstrom leaders see this customer service as an essential component of the company's culture, and as an important means of achieving competitive advantage within the fast changing fashion industry. For years, they have worked to embed customer service into the very fabric of their organization.

To achieve their exemplary customer service, Nordstrom leaders have empowered and enabled their employees to have the autonomy necessary to ensure customer satisfaction. These leaders understand the reality that the company's business strategy will be successful only when each employee takes the initiative to demonstrate the highest level of service. In order to ensure this happens, Nordstrom leaders provide employees with the right level of resources, communication, and means of reducing bureaucracy. From the very first day of employment, they clearly deliver the message that decisions are to be pushed down to the lowest possible level. In fact, Nordstrom's employee handbook famously reads, "Our One Rule: Use good judgment in all situations. Please feel free to ask your department manager, store manager, or Human Resources any questions at any time" (Business Insider, Lutz).

However, Nordstrom's leaders don't just empower employees to make decisions. They also give them the capacity to do so by providing them with a series of decision-making standards as a means of guiding them to the proper action. At Nordstrom, employee autonomy and decision making are supported by rigorously maintained standards and training, not just a single sentence within the employee handbook. The included standards address a multitude of issues, including the importance of customer service, expected customer emotional response, and even the expected method of actually accomplishing said response. With each passing day, these

issues become clearer to employees. As such, they are increasingly empowered to make the right decisions. This is true even when they need to deviate from the set processes in order to meet customer needs and expectations.

Nordstrom has been consistently rated as a one of the “best places to work.” When leaders at an organization give employees authority and responsibility, they not only allow their companies to realize their strategies by better leveraging their people, but they also keep the momentum going by utilizing company culture to enhance the loyalty of team members.

While trying to enable teams and sustain their motivation, leaders face the challenge of balancing two opposing factors. In many ways, this balancing act is a lot like the story of Goldilocks and the three bears. Each bear had its own preference for food and size of their beds. Goldilocks found options that were situated on two extreme ends. While one bed was too big, another was too small. While one soup was too hot, another was too cold. However, after a bit of experimentation, she also found the option that was ‘just right’. Similarly, thriving organizational leaders have to define a mix of different characteristics that are ‘just right’ for their firms.

The challenge for leaders is not to select one task structure versus another, but to know under what conditions one happens to be the most appropriate. They are responsible for ensuring that the organization is not acting like a welfare agency in making resources available to teams. “As the leader of your initiative, you need to make sure that your group’s access to organizational resources does not fall below a certain threshold: where your group shifts from being “hungry” to being “discouraged” (Bacharach, “Keep Them On Your Side” 89). Organizational leaders need to balance efficiency by routinizing work when possible, but not at

the expense of engagement and employee problem-solving capability. While Clunky and Myopic organizations fail to sustain momentum due to the tendency of their leaders to gravitate towards the extremes of each parameter, sustainers succeed by identifying and implementing that 'just right' balance of the continuum.

## Maintaining Direction

Sometimes the employees tasked with executing a project lose momentum and motivation because they have no idea where they are going. After having started the journey excitedly, their passion fades because they don't know if they are making any progress. Sometimes they get involved in the micro minutiae of details and get derailed from the original idea. According to Bacharach, sustainers need to have the capacity to detect when things veer off course in order to step in to make corrections. "They understand that a plan is just that—actions based on a certain set of assumptions" (Bacharach, "Keep Them On Your Side" 101). He argues that the importance of monitoring progress and letting teams know how they are performing in order to guide them back on track cannot be understated, especially when sustaining momentum. If people have no idea whether they are progressing, then they blindly move along a defined path until they get tired. Leaders are able to assess people on the team, discuss their performance, and make changes as needed. By doing this, thriving organizational leaders are able to keep things moving in the intended direction.

## Defining Organizational Goals

Effective leaders let people know what the goals are - an increase in productivity, better quality, or more innovative products. The inability to do this may lead to their team members asking for too many directions or becoming disengaged because of not knowing what to work towards. It could also lead to a disorganized mess—with people marching in different directions. Over the long-term, this will result in the group members being constantly at odds with one another with regards to their responsibilities. Simply put, the organization goes nowhere. By defining clear criteria, leaders help the members of their teams understand what is acceptable and what is not. This empowers them to make quicker decisions on their own.

Merck is a thriving organization operating within the healthcare industry whose leaders understand the importance of having clear and specific goals. While it is a for-profit organization, the company's vision is to make a difference in the lives of people through medicine. Its mission is to improve lives around the world, and it's a common thread tying all employees together. Everyone understands that the bottom line is the number of lives that the company impacts and improves. The organization defines itself as an R&D firm, developing innovative solutions related to health. In the pharmaceutical industry, where it takes up to ten years for a drug to come to market, it can be easy for people to lose momentum.

Through Merck's culture and actions, everyone in the organization knows that its primary goal is to develop innovative medicines to solve health problems. In the 1980s, a disease called River Blindness afflicted over 18 million people in 30 countries. Merck responded by developing a drug to treat the disease. Partnering with the WHO, the World Bank, and other pharmaceutical firms, the company's leaders even opted to distribute it for free to countries that requested it.



To this day, “A 40-year partnership... protects 100 million people a year from river blindness in 31 African countries” (The World Bank).

Similarly, in 2011 Merck launched Merck for Mothers, an initiative committed to contribute \$500 million over 10 years to reduce maternal mortality. “Merck for Mothers applies private sector approaches to improve access to quality maternal health care that women receive in health facilities at the time of childbirth and improve access to quality modern contraceptives” (Olphert, Boston College Center for Corporate Citizenship). The company’s leaders have consistently sent a message to employees that the bottom line is to develop medicines that will help people. The organization also keeps track of the progress it is making to keep people motivated. Four years into its initiative to improve maternal health, Merck’s program has provided over 5 million women access to improved maternal healthcare. Knowing these metrics helps employees to know that they are on the right track, thus sustaining the momentum of their efforts.

### Making Adjustments

While it is important to be clear in defining the bottom line, the leaders of thriving organizations are also prepared to make adjustments. Over a period of time, as new information and events arise, assumptions may change and old parameters might not be relevant. “As things move along, you have to be able to make corrections and adjustments to ensure that momentum is sustained” (Bacharach, “Keep Them On Your Side” 42). Sustainers are able to understand the shifting environment and make the necessary changes. They understand that when a ball bearing rolls down an incline, it builds momentum over time. However, if it starts rolling in the wrong direction, these leaders take the initiative to redirect it. That said, efficient leaders are careful

not to redirect the ball bearing too often. Doing so may result in the loss of its momentum and it ultimately stopping. It may even move in an unpredictable and a jerky motion. Either way, the ball bearing may never build the momentum that it needs to reach the end of its course.

Unlike most firms, IKEA is an organization whose leaders have successfully adjusted its practices to adapt to the changing environment. Together with knowing where the company is going, IKEA's leaders also understand that it is important for employees to see that the organization is upholding its espoused values. The knowledge that they are working for an organization that has an overall positive impact in the world can be the motivating factor that they need to succeed.

This is made clear by the course of action taken by its leaders in 1995, after their discovery that several affiliated carpet factories were exploiting child labor. "Founder Ingvar Kamprad and his IKEA executives immediately took action, addressing the problem from within and taking all steps necessary to ensure that an IKEA product never again would be created by manufacturers that exploited children" (Llopis, Forbes). Quickly, he moved to solidify IKEA's commitment to the elimination of this problem. Partnering with [UNICEF](#), IKEA moved to launch a program that aimed to prevent child labor. Its leaders attempted to do so by investing the resources necessary to change the various conditions of poverty, hunger, and illiteracy that initially led to its rise. This program is in effect to this day. It serves more than five hundred villages in India's Carpet Belt, a densely populated area with over a million inhabitants.

Microsoft is another company whose leaders have succeeded in making the adjustments necessary to adapt to its environment and better execute innovation. Panos Panay, Microsoft's Corporate VP of Devices, exemplifies a leader with the ability to sustain the execution of his

agenda by adjusting the direction of his coalition. Currently, Panay holds the role of the project lead of the team behind the Microsoft Surface Book, the company's lauded and industry trendsetting laptop-tablet hybrid.

Today, the Surface Book is known as Microsoft's first laptop tablet hybrid, a spark of genius from a company that many had written off. The world knows it for its innovative ability to transform into a tablet with the click of a button. However, this was not always the case. Initially, its working concept was much more narrow- the ultimate laptop. Although a worthy goal, it in practice fell well within the conventions of what most PC manufacturers had attempted to create for the past decade. "The team responsible for the product... showed up and said, okay, we've done it. It's going to be thin, light, cool, and fast. It's going to be an awesome laptop" (Pierce, Wired). From its early stages, to the creation of its initial prototypes, the Surface Book seemed destined to be a simple variation of the tried and true laptop design.

Already the project lead for Microsoft's Surface tablets, Panay was well versed with sustaining agendas by adjusting the means by which they were executed. Influenced by the Surface tablet line, Panay held the belief that the Surface Book team could do better. "How could we possibly feel proud of making the best laptop? That wasn't reinventing anything" (Panay). As such, Panay took the initiative to push his team towards the execution of a much more radical concept. He challenged his team by giving it the specific goal of reinventing the laptop. Eventually, this goal became that of a Microsoft laptop with the ability to transform into and function as a tablet. The Surface Book had been born.

Acting as a sustainer, Panay detected that the Surface Book Team was well on its way to making an average product. They had a great concept and prototype in mind. However, both

lacked that extra spark of creativity that would lead to true innovation. As such, Panay took the initiative to adjust the direction of his team's agenda by challenging its members to achieve a much more difficult objective. The result of their efforts, the Microsoft Surface Book, has been widely praised by customers and critics alike. "It's the product of everything Microsoft has learned from making the first Surface machines, and from watching Apple eat its lunch" (Pierce, Wired). For the first time in a long time, Microsoft is positioned to be an industry trendsetter. The old giant has reawakened to recapture its former glory.

### Providing Feedback and Investing in Development

The leaders of thriving organizations also understand that people don't remain engaged with an initiative unless they are continually learning, being challenged, and/or have a sense that they are developing as professionals. To sustain momentum and keep people on their side, leaders need to think of themselves as the "chief development officer."

Effective leaders monitor the performance of their employees and provide them with feedback on how they are doing. "Evaluating to sustain momentum is about asking the right questions often enough, but not overdoing it, and asking them in such a way to focus your colleagues, but not destroy their motivation" (Bacharach, "Keep Them On Your Side" 103). This means helping others understand expectations, how they are doing, and how they can improve. At the same time, investing in people's development sends the very strong message that what they do matters and that the leader is interested in both their agenda and in their development. To maintain direction, thriving organizational leaders take an active role in the development of their team members. They partner with them in a way that helps them remain engaged in the

agenda and eager to do more, learn more, and improve their performance. They build a shared understanding of goals and agree on a plan for improvement and development.

Merck's Fellowship for Global Health is a unique program created by the company's leadership with the sole purpose of developing talent. "The program pairs the best minds from our company with nonprofit partner organizations around the world to provide meaningful and systematic improvements in health service delivery for people in the greatest need" (Merck & CO., INC.). 30 high potential employees are selected to work in collaboration with an NGO for a period of three months. These employees travel to some remote and under-developed location in any part of the world and observe the health challenges that people living in those communities face. Often, employees describe helping people in countries like India, Bangladesh, Uganda, and Kenya as a challenging and unique 'life-changing experience'. By the time they return back to their jobs after a period of three months they have developed professionally and personally. Merck then takes the initiative to leverage their collective experience to better understand the needs of foreign markets and to explore solutions.

Selection into this program conveys to employees that they are valued. After all, the company has invested significantly into their development. Merck's Fellowship for Global Health enables employees to sustain momentum through the knowledge that their skills are being developed. This program also has the added effect of reconnecting employees to the organization's purpose by enabling them to experience first-hand the impact that their work has all around the world.

Together with Merck, Tata Group of India is another organization whose leaders actively develop employees as a means to sustain their momentum. Originally established in 1868 as a

trading company, Tata is well known for its paternalistic culture towards its employees. From the very beginning, Tata's leaders have taken the initiative to better their economic and social circumstances. Today the company has expanded into a portfolio of over 26 companies within industries as diverse as Tata Steel, Tata Motors and Tata Consulting Services.

However, the early 1990s saw the company begin to lose its direction as a culture of complacency was setting in amongst employees. Understanding the need to sustain and maintain direction, Ratan Tata, the company's then Chairmen, attempted to change its organizational culture. As a part of his efforts to unify the various brands, he launched the 'Tata Business Excellence Model' (TBEM). TBEM was a business excellence model, adopted from the Malcom Baldrige Quality Award Program. It covered seven core aspects of business operations: leadership, strategic planning, customer focus; measurement, analysis and knowledge management, workforce focus, process management and outcomes of financial and non-financial parameters, and finally business results. Under Tata's leadership, the employees of all affiliated companies had to adhere to the training and performance guidelines of the TBEM

Tata's adoption of TBEM was implemented in a phased manner to all Tata affiliated companies. This was part of Ratan Tata's efforts to change the company's culture to become more performance oriented as a means of sustaining employee momentum within their efforts to execute agendas in the face of growing competition. As a result of his efforts, employee attitudes and organizational culture have changed to encompass performance. Many of the Tata companies have become world class in terms of their quality and products. For example, Tata Steel is one of the top steel manufacturing companies in the world with operations expanding to

Europe, Africa and the UK. Clearly, sustaining momentum through employee development has enabled Tata to thrive when faced with adversity.

Trying to maintain direction also requires that leaders do a balancing act. Evaluating to sustain momentum requires that they ask the right questions often enough without overdoing it. It also requires that they are asked in such a way that their team members are focused without destroying their motivation. Sustainers have to stay on top of things without smothering them. While providing feedback, they have to be fair, honest and specific so that these people know where to improve without having others think of them as chronic critics.

Leaders in Clunky and Myopic organizations usually tend to overdo or underdo these actions. As a result, they inadvertently kill momentum. In contrast, thriving organizational leaders manage to sustain momentum as they find the right balance to let people know what they need to improve, and provide them with the confidence that they need to achieve their goals.

## Sustaining Commitment

Cultural Momentum can be defined as the feeling of the collective, together with the social and psychological purpose of belonging that occurs within a successful team or organization. Within this context, Bacharach makes the argument that culture encompasses the ability to keep the relationships among people together and strong. “Learning, affiliation, and reaffirmation are keys to creating a culture of motivation and therefore, to sustaining momentum” (Bacharach, “Keep Them On Your Side” 126). The sustaining of momentum necessitates more than simply providing the members of your team with the appropriate

structure and its corresponding capacity to deal with uncertainty. Additionally, making adjustments to constantly adapt to the changing environment does not quite cut it either. The leaders of thriving organizations understand that one of their primary tasks is to keep their teams both socially and psychologically motivated. They understand that they have to sustain and direct their teams' motivation, the willingness of their members to expend the necessary amount of effort to achieve their team goals.

By virtue of their ability to motivate, focus, and socialize individuals to allow them to view themselves within the context of a group, thriving organizational leaders are able to sustain momentum. Enabling individuals to engage collectively and feel as though they are part of a team allows these leaders to sustain their commitment to the agendas they wish to advance. In this manner, commitment and confidence, even in the face of considerable adversity, is solidified. Here lies the necessity of Cultural Momentum- the leaders that understand its underlying dynamic acquire the ability to sustain and motivate their groups. This results in their ability to reinforce the importance of their overall agendas within the eyes of their team members and in turn drive them towards their completion.

### **Institutionalizing Culture**

One of the main components of cultural momentum is the ability of sustainers to instill the culture of an organization or group into an individual. Organizational cultures are effectively mirrors that impart upon the members of a firm the behaviors that are expected of them. "When you establish community around your initiative or activity, you're creating a social-psychological sense of group affiliation and associated identity" (Bacharach, "Keep Them On Your Side" 134). Positive organizational cultures impart advantages to the firms that have them. Additionally,



they also impart and incentivize the appearance of positive behaviors within their employees. Some organizations are blessed with the ability to instill upon a visitor the immediate first impression of their culture, whatever it happens to be. The cultures of these firms are strong to the extent that simply walking through their corporate premises results in the ability to actively sample them. Assuming that these organizations have positive cultures, their strength positively affects them. Strong, positive cultures enhance the ability of newcomers to become more easily socialized to these firms. These companies can then easily obtain the advantages of their positive cultures.

Sustainers are able to use their knowledge of cultural momentum to effectively socialize newcomers to the cultures of their firms, regardless of the overall strength of the organizational culture. They allow incoming employees to clearly see into the cultural mirror, and understand the behaviors that are expected of them. Additionally, their understanding of Cultural Momentum also allows them to build the strength of group and organizational cultures. Over time, their strength becomes similar to those of the organizations discussed above, and they are effortlessly communicated to their employees. In turn, they are also more easily absorbed by newcomers. Together, the abilities of thriving organization leaders result in the enhancement of overall employee effectiveness, thus strengthening the efficiency of the entire organization.

Steve Jobs knew how to create a strong and positive culture. During both his initial tenure at Apple, and his triumphant return, Jobs was able to utilize his knowledge of Cultural Momentum to build the culture seen today. An example of his success can be seen within his early insistence on secrecy, and its resulting creation of Apple's unique secrecy culture. Jobs valued secrecy due to the inherent advantages that it offered. One of which was its ability to freely foster the rumor

mill and buildup press coverage. Another was its ability to protect current Apple products from being cannibalized by those that were new. However, its most important advantage was that retaining the element of surprise allowed Apple to attack its competition blind and check the otherwise inevitable buildup of new product customer expectations. "...Announcing products before they are ready gives the competition time to respond, raises customer expectations, and opens the company up to the carping of critics who are bashing an idea rather than an actual product" (Lashinsky, 36). The above rationale clearly depicts a culture of secrecy as one that positively affects the organization adopting it.

Stemming from Jobs's influence, Apple excels at engraining its strong, positive culture of secrecy into the minds of its employees. This is done immediately during their first day of orientation. The head of Apple Security walks into the orientation room, stresses the importance of secrecy, and frankly tells the new employees the consequences of failing to abide by it. In contrast to the upbeat nature of the remainder of orientation, this secrecy briefing sets the tone for a serious career long acceptance of its importance. Essentially, the newcomers are made to look into the mirror of Apple's secrecy culture, and upon viewing the contrast created by its emphasis they are able to clearly see that abiding by it will be required of them. By imparting its culture so well, Apple effectively takes the first step in guaranteeing that its employees behave in a manner that fosters its continuation. As such, the company is able to continuously benefit from the advantages gained from its positive secrecy culture.

### Leveraging Cultural Momentum

Take a moment to imagine the appearance of two teams with similar resources. The first is able to deliver the results expected of it, while the second cannot. The second team begins its

projects, but for some reason lacks the ability to finish them. In many cases, Cultural Momentum acts as the X factor. The successful socializing of values and purpose allows the leader of the first team to create camaraderie, belonging, and collaboration among its members. Instead of focusing solely upon their individual personas, the team members focus on the persona of the collective group. Eventually, they even begin to define themselves via the lens of their group. “People have a sense of common identity, common purpose, and emotional ties” (Bacharach, “Keep Them On Your Side” 134). Doing so acts as the foundation of the cultural momentum that will allow the first team to advance through the inevitable resistance that it will meet on the road to completing its agenda.

Unable to build the team camaraderie and collaboration described above, the leader of the second team cannot get its members to think past themselves. More often than not, the people within this team continue to feel as though they are a motley assembly of parts, instead of a functioning vehicle. Their interests remain as divergent as their seeming inability to work as a single functioning body. As a result, the appearance of diversity and difficulty entice the members to question their motivation to achieve the goals that their leader has set for them. Internal differences and a lack of collaboration ensues. Lacking the strength of the cultural glue needed to keep its effort together, the second team loses the momentum to complete its agenda.

Former CEO of IBM, Lou Gerstner knew this concept well. He understood the ability of cultural momentum to impact whether or not an organization ultimately succeeded or failed. In the 1990s, IBM was in trouble. The aging grandfather and former king of the computer industry had found itself in a cycle of stifled innovation, failing products, and the constant loss of cash. At this time, the company’s culture was characterized by a tangled web of

bureaucracy, and a “Me First” mentality that hinted at overt individualism. Together, these characteristics portrayed a culture dominated by stagnation and extreme decentralization, one that promoted the rise of fiefdoms and constant internal strife. “Units competed with each other, hid things from each other. Huge staffs spent countless hours debating and managing transfer pricing terms between IBM units instead of facilitating a seamless transfer of products to customers” (Gerstner). Caught at a crossroads, the ailing giant was presented with what many believed to be an impossible choice. IBM had to either change, or die.

In 1993, Lou Gerstner became IBM’s CEO. Quickly, he decided that the company had to integrate its operations to foster innovation and better serve its clients. “We needed to integrate as a team inside the company so that we could integrate for the customers on their premises” (Gerstner). Gerstner’s strategy fostered IBM’s utilization of integrated processes and operations, and attempted to sustain it through the cultivation of a culture that supported further integration. Demonstrating the importance of operational integration, “[Gerstner] famously put the brakes on a plan, which was already well under way, to break up the company into several operating units” (Dicarlo, Forbes). Deciding that the value of an intact IBM was greater than its individual parts, he personally stepped in to retain its various components. Gerstner further emphasized integration through his decision to consolidate the company’s various advertising agencies. Understanding the importance of a unified marketing plan, he clearly saw the confusion created by their mixed messages. From now on, the message of only one voice would sell the IBM brand.

With his plan to turnaround IBM in place, the question remained of exactly how Gerstner could sustain his integration agenda and succeed in its execution. He did this by

leveraging his knowledge of cultural momentum to create a series of initiatives that fostered the creation of a culture that backed his integration strategy. Gerstner understood that any change in culture required the effective socialization of old and new employees. From the mid-1990s onward, incoming IBMers were required to create a list of three personal commitments whereby they personally pledged to foster the advancement of IBM's strategic initiatives for that year. "Performance against those commitments was directly tied to salary" (Dicarlo, Forbes). By instituting yearly commitments, Gerstner clearly emphasized the importance of collective effort, and laid the groundwork for the creation of a strong culture of teamwork. Additionally, its extension to existing employees led to the rapid elimination of the former culture of overt individualism. In this way, Gerstner succeeded in creating a system that socialized employees into IBM's new integration culture, while simultaneously transforming its old culture of individual self-interest.

Gerstner's second initiative for cultural transformation was the creation of a new compensation system that tied individual pay to overall corporate performance. From this point onward, employees were now rewarded for their ability to deliver on shared organizational goals. Early on, Gerstner had found this new system to be necessary, especially for IBM's executives. Aside from their tendency to compete against one another more fiercely than against their external competition, much of IBM's leadership viewed their roles as being ceremonial in nature. "He [Gerstner] explains that Senior executives at IBM were expected to preside, to review. They didn't do the work" (Knowledge at Wharton).

Through the creation of this new compensation system, Gerstner incentivized the development of a culture that stressed the importance of delivery and teamwork. All

employees were expected to get their hands dirty and do the work. The new compensation system led to the decline and eventual fall of fiefdoms, as employees came to understand that collective effort was the key to overall corporate success. In this way, Gerstner leveraged his knowledge of cultural momentum to get IBM's current and future employees to dance to the tune of a team based culture, one that fostered his strategy of tight integration. To the surprise of its many critics, the aging giant would succeed in turning from the abyss.

Commonly described as one of the greatest managers of our time, Jack Welch also understood the importance of cultural momentum to the sustaining of employee commitment. This is made clear through two of his most important traits, the ability to motivate employees, together with his ability to successfully instill the values that sustained their efforts. For decades, Welch was adept at socializing employees into the culture of GE. One of the ways that he did this was through the application of quarterly performance reviews. Unlike the managers that complained about their lack of time in completing them, Welch saw the honest and comprehensive appraising of employees as being his most important responsibility. According to Welch, "That's your number one job." By regularly meeting with employees, and by candidly discussing their performance, Welch effectively instilled within each one the values that GE expected of them. In doing so, he was able to build a collective singular purpose among his team members.

The collective purpose instilled by Welch became the bedrock of GE's culture. It was further supported by another of his creations, GE's Workout program. Essentially it fostered and solidified an atmosphere of collaboration within GE by eliminating the company's hierarchical nature via information exchange. Through candid, regular performance evaluations, and the

establishment of Workout, Welch created the foundation for a corporate environment characterized by employee accountability and the fluidity of ideas. A sense of commitment and belonging to this strong culture soon became the norm. The result was the flowering of operational efficiency, creativity, and corporate performance measures. Welch's tenure as CEO of GE was characterized by the regular over-achievement of corporate goals.

### Keeping the Coalition Mindset (Political Momentum)

Bacharach defines the coalition mindset as the competency, sense of purpose, and action that is collectively held by the members of a group. "A group of individuals can work together at the same time, in the same office, and on the same project, but if they don't maintain the spirit that brought them together, they will become demoralized and lose their ability to sustain momentum" (Bacharach, "The Agenda Mover" 143). Essentially it's that key ingredient that enables a team to keep going regardless of the inevitable challenges that its members will face, all while pushing them to eventually execute upon their collective agenda.

Within both Keep Them on Your Side and the Agenda Mover, Bacharach goes on to argue for the necessity of keeping the coalition mindset. "If the campaign mind-set is missing, if team members don't feel a shared sense of purpose, a wider commitment, and a collective mission, then they will lose sight of the initial vision and forget about the first spark that made them so driven and motivated in the first place" (Bacharach, "The Agenda Mover" 144). There are four primary components that are critical to keeping the coalition mindset: reinvigorating the vision, reinforcing the benefits, sustaining optimism, and maintaining credibility. This final political aspect of momentum also includes the leader's ability to decide which members are essential

to their coalition, and at the same time can continue to be incorporated within their team.

Disagreements will emerge over the course of executing an agenda. Sustainers understand that regardless of how hard they try, they cannot please everyone.

Essentially, the vision is the long-term emotional objective that is held by a coalition. It's that end goal, much of the time emotional in nature, that its members are all trying to achieve. It's also the emotional aspect of why they initially joined your team. Through all the effort and challenges that they face, people sometimes forget what it is that they are attempting to accomplish. "Day in and day out, feeling like Sisyphus, you roll the stone uphill hoping that it won't roll back on top of you" (Bacharach, "Keep Them On Your Side" 185). Unlike their clunky and myopic counterparts, thriving organizational leaders periodically reinvigorate the vision in order to sustain the coalition mindset. They set themselves apart in that they are capable of reminding their team members of this emotional aspect. They remind them of what it is that they are actually going after and why they first took the plunge.

Whereas reinvigorating the vision is essentially sustaining the emotional appeal of a coalition's agenda, reinforcing the benefits is reminding everyone of the very tangible rational aspect of why they initially joined. The bottom line is that people first joined your coalition due to series of rational decisions based in large part upon the benefits that they would achieve upon seeing your success. At the end of the day, the coalition mindset will remain if these same people believe that the potential benefits of your coalition's success are greater than those that they will attain if they step aside to see its failure. "Your responsibility in sustaining the coalition mindset is to make it clear to the critical sectors in the organization that what is essential to the bottom line is to put resources and time into your effort" (Bacharach, "Keep



Them On Your Side” 187). Sustainers periodically remind their team members of what they will gain upon the success of their agenda. In turn, this action incentivizes them to keep moving forward.

Another essential aspect to keeping the coalition mindset alive and well is sustaining optimism. Optimism is morale. It’s that collective and pervasive feeling that the group will eventually succeed in getting it done. “A mistake that some leaders make is that they spin off into self-reflective negativism, thinking that if they share their hesitation and concern, they will create sympathetic alliances (Bacharach, “Keep Them On Your Side” 188). In attempting to sustain optimism your challenge as a leader is to keep up the morale of your team, all while being realistic. It is alright to acknowledge the difficulties and the bumps in the road every once in a while. If anything, this action shows your team members that you are actually aware of what’s going on. However, as a leader you are responsible for keeping the belief that the team will eventually succeed. You are responsible for being the rock that everyone else can stand on when everything seems like it’s just going down the drain.

The final aspect of retaining the coalition mindset is your ability to maintain credibility. “Credibility implies that others have trust in your intent and your capacity to stay with the program and move things forward” (Bacharach, “Keep Them On Your Side” 189). In many ways, credibility can be seen as the glue that keeps a coalition together. At the onset, the extent of your political agility and its corresponding effect upon your ability to create a coalition is based upon the outside perception of your personal credibility. Initially, the members of your coalition got on your side because they believed in your credibility. They joined your team because they believed in you. However, as your agenda moves towards completion,

unexpected occurrence and reversals of fortune may have damaged your credibility. In order to keep the coalition mindset, your job is to keep your credibility up to the point where people remain confident in your ability to execute and get things done. At times, you may have to act to replenish your credibility. This is where short term wins and their ability to point to progress derive their importance.

### Moneyball- Coalition Mindset

The initial efforts of Oakland A's General Manager Billy Beane in executing a radically different method of approaching baseball clearly illustrates his mastery of the aspects necessary to keep the coalition mindset intact. In 2002, the Oakland A's had the second lowest payroll in all of major league baseball. "...The richest team, the New York Yankees, had a payroll of \$126 million while the two poorest teams, the Oakland A's and the Tampa Bay Devil Rays, had payrolls of less than a third of that, about \$40 million" (Lewis, Loc 112). Payroll determines what players a baseball team can afford. Common wisdom states that the best (and most expensive) players make the best teams. However, in reality the main question is how do you judge baseball players? With the help of his assistant Paul Depodesta, Beane discovered that the methods by which baseball stars were judged were flawed. He discovered that many of the common metrics such as slugging percentage, batting average, and even fielding & hitting technique were overvalued, while the most important, on base percentage, was undervalued. As a result, many otherwise valuable players were often undervalued as well. Because of this, Beane was able to create a team that fit his budget, one comprised of the most valuable yet undervalued players within all of baseball.

At this point, it's worth diving a bit deeper into the rationale behind the importance that Beane and Depodesta placed upon the metric of on base percentage. "...If a team had an on-base percentage of 1.000 (referred to as "a thousand")- that is, every hitter got on base- how many runs would it score? An infinite number of runs since the team would never make an out" (Lewis, 127). At the end of the day, getting on base and scoring win baseball games. The number of wins usually determines if a team makes the playoffs. Here lies the necessity of on base percentage.

Essentially, Beane's new strategy hinged on getting on base by any means necessary. This was something that everyone within the Oakland A's franchise, not just the baseball players themselves, had to take to heart. Beane only recruited those that got on base. It didn't matter if it was a walk or a hit- you just had to make it to first. Bunting was frowned upon. So were stealing bases, and aiming to hit that game-changing home run. This was a hard drop to swallow for players and coaches that had done the above for their entire lives. After all, conventional wisdom had trained them to do these things ever since they were kids. Beane challenged the Oakland A's to adapt to his system. The amazing part is that he was able to keep the coalition mindset necessary to execute it.

Within this unconventional strategy, the players' vision was that they had the chance to play the game. Simply put, it was the fact that that they could actually play major league baseball. One of the most interesting aspects of Beane's strategy was that it tended to undervalue many of the established baseball stars, while placing value upon those who weren't famous yet. The reason for this was the fact that the established stars tended to lack the high on base percentage that it placed so much importance on, while the nobody's that Beane

recruited always had this characteristic. Oakland A's players understood that Beane's system was the only one that presented them with the opportunity to play the game that they loved. After all, nobody else wanted them. Otherwise, they would've easily been too expensive for Oakland, a fact that Beane reminded them of. By doing this, he reminded them of their vision.

Tied with this vision was the very tangible and rational aspect of why the players initially joined Beane's coalition. They did so because of the fact that Beane wanted them and was willing to pay them. Once again, conventional wisdom had undervalued many of these valuable players. This occurred to the extent that very few teams wanted them and were willing to pay their salaries. A prime example was Scott Hatteberg, the former Red Sox catcher who almost always got on base, but had injured his arm. "He was, when Billy Beane signed him, a second string, washed up catcher" (Lewis, 159). Hatteberg, like the other players, knew that the tangible benefit of staying within Beane's coalition was much greater than leaving it- they would actually get paid. Again, this was something that Beane periodically reminded them of.

All throughout the 2002 season, Beane did his best to keep up optimism. Early on, the A's suffered through a rough patch of losses as the team and its players played through criticism as it ironed out the bugs of its unorthodox strategy. However, Beane kept his game face on and continued to push for the implementation of his strategy without wavering. This was especially true when he addressed the press and spoke to his players. His ability to sustain optimism and push forward is even more impressive considering the pressure that he was under at that time. By embarking upon a radically different baseball strategy, Beane essentially bet his career on the success of the A's 2002 season. No other team believed that it would work. In fact, the media, together with all the other teams, openly criticized him. Not only

would its failure lose him his position as general manager, but it would most likely bar him from working for any other franchise. By acting to sustain optimism and implement his agenda regardless, Beane acted as the pillar of support required by his team to push forward and execute.

Finally, we come to the factor of credibility. Early on, Beane's credibility within the A's was based upon his unique career trajectory. Initially, he was a baseball player- a golden prospect who was supposed to be the next star. "He was so naturally superior to whomever he happened to be playing against... that he appeared to be in a different, easier game" (Lewis, 6). After a disappointing career within the major leagues, Beane became a scout himself. Eventually, this led to his position as the A's general manager. As a result of his career, Beane had the chance to experience almost everything within major league baseball. He had played the game, seen how scouts did their work, and now found himself managing an entire team. Leveraging this experience, he argued that traditional scouts were judging players incorrectly, and that a better strategy existed of approaching the game. "We take fifty guys and celebrate if two of them make it... If you did that in the stock market, you'd go broke" (Beane, 17). The depth of his experience was enough to persuade many to accept his credibility and join his coalition.

Later, Beane's credibility became tied to the increasing success of his unorthodox strategy. Although the A's played a disappointing first half of the 2002 season, the second saw the team catch its stride. Towards the end, the team stunned the world by winning twenty games in a row. The importance of its streak cannot be overstated. After decades, the A's accomplished what many thought was impossible. The team had succeeded in setting a new

American League record for consecutive wins. Luckily for Beane, his name was attached to it. Although only a short term win within his ultimate goal of making the playoffs and winning the World Series, the streak handily replenished his credibility. From that point onward, Bean's credibility, together with the coalition mindset, was solidified internally within the Oakland A's. Under his leadership, the team has continued to succeed in implementing his unorthodox strategy ever since.

### The Incorporation Decision

Commonly, the decline of the coalition mindset leads into the appearance of inter-group dissent and its child of opposition. Sustainers understand that coalition members will change in their attitudes as a project moves forward to its completion. "You might not realize that the group that you started your initiative with may no longer be the group that you need now" (Bacharach, "Keep Them On Your Side" 191). Disagreements over aspects such as leadership style, resources, and performance tracking may be enough to make even the most supportive of coalition members question the direction that you have taken in leading your team.

That said, it is worth remembering that this is a problem that even the best of sustainers are periodically faced with. Bacharach himself acknowledges the inevitability of disagreement stemming from the change that occurs as a project progresses. "Even those who most believe in your effort, who are most in your corner, will flounder once in a while" (Bacharach, "The Agenda Mover" 148). The bottom line is that you cannot make everyone happy, even if you put in the effort to do so. Thriving organizational leaders succeed because of their unique ability to deal with this inherent fact of life and complete their agenda regardless.

At the very heart of this challenge is the incorporation decision. This is the question of whether or not you decide to continue incorporating a dissenting stakeholder within your agenda, or instead cut your losses here and attempt to concentrate your efforts upon continuing to incorporate the remaining members of your coalition. Making and executing this decision requires a degree of attentiveness and pragmatism on the part of the leader. “To sustain momentum, you will have to revisit who is on your side, who you want to be on your side, and who you’re willing to let go” (Bacharach, “Keep Them On Your Side” 191).

Thriving organizational leaders are masters of understanding the aspects of this decision and executing it with the required action. Not only do they take the time to actively reflect upon who they need and are able to incorporate, but they also remain attentive enough to understand how they can get them to act in the desired manner. At the same time, they are cognizant of who they must ultimately let go. These same leaders also stand out in their ability to get their hands dirty and execute this action successfully.

#### [Moneyball- The Incorporation Decision](#)

As a general manager, and former baseball player, Beane understood that he had to continue incorporating both the players and the coaches into his coalition no matter what. Even after all their persistent criticism, he knew that there was simply no way around it. It was one thing for he and Depodesta to create the A’s new and unorthodox strategy, but it was another to have it executed day after day in the field and dugout. The coaches and players had to do just that. Leaving them alone ran the risk of watching the team implode as they completely changed their methodically prepared strategy. This was a very real possibility, especially in the first half of the season as the A’s continued to slump.

Beane executed his decision of incorporating both set of stakeholders by creating a situation where they had no choice but to implement his strategy. He started at the top with the coaches. Due to his position as Oakland's general manager, Beane had the ability to acquire and trade players. He also had the ability to move them up from the minor leagues and down from the majors. Beane used these capabilities to ensure that his team was played exactly as he and Depodesta had imagined. "In what amounted to a purge, Billy Beane sent down to the minors the team's starting first baseman Carlos Pena, starting second baseman Frankie Menechino, starting pitcher Eric Hiljus, and right-handed setup man Jeff Tam" (Lewis,166). Simply put, Beane moved and traded the players that the coaches made use of to modify his strategy without his consent.

Lacking alternatives, the coaches eventually bought into Beane's strategy. Soon, they consistently played the team almost exactly as he and Depodesta had designed it to be played. From here, his actions trickled down to the players themselves, as the coaches began reinforcing his strategy through specialized training and practice. In this way, Beane succeeded in executing the incorporation decision. The result was the creation of a ruthlessly efficient baseholding team that went on to win the twenty game American League streak mentioned above.

## Conclusion

Within his work, Bacharach's basic premise is that organizations inevitably get stuck for a number of reasons. Of these, the primary reason is the fact that they fail to move agendas and ideas towards their implementation. In his original work, Bacharach places a primary emphasis



not on ideation, the creation of ideas, but on how to actually execute them throughout the organizational system. He does so because at the end of the day creativity lacks significance if the resulting ideas are not executed. Essentially, his argument is that innovation does not matter if the leaders backing it cannot ensure its implementation. In doing so, Bacharach argues that there are two components to driving ideas forward.

The first of these components is the core leadership skill of political competence. Its key aspects are explained in depth within his book Get Them On Your Side. Specifically, Bacharach argues that in order to move an innovative agenda forward, leaders need to mobilize coalitions by convincing the key stakeholders to join a collective effort. This, however, is only one part of his argument. The other is the necessity of having the leadership skill of managerial synergy. In Keep Them On Your Side and The Agenda Mover, Bacharach defines it as having the capacity to sustain the forward momentum that was first established by initially creating a coalition. This thesis focuses primarily upon managerial synergy. Indeed, as I have tried to illustrate within it, Bacharach argues that many organizational leaders fail to move their ideas because after mobilizing support the common tendency is for them to drop the ball.

Many leaders do not maintain the positive momentum, and the critical synergy that is necessary to go the distance and implement their ideas. Instead, they waiver. While they have proved their political competence and their capacity to move new ideas forward, they have not displayed the managerial competence that is necessary for them to execute it by sustaining momentum. Indeed, as Bacharach argues, and as I have reinforced, maintaining momentum and not dropping the ball is a critical managerial state. Organizations that have leaders capable of maintaining momentum are those most likely to succeed in seeing their ideas fulfilled.

Within this thesis, I have attempted to take the key insights of Bacharach's argument of sustaining momentum and make them more concrete by giving them an empirical organizational reality through the use of various examples. In each instance, I have tried to illustrate the validity of his argument through the use of in-depth case material. However, that said, I do believe that while this thesis does succeed in moving his argument forward through its comprehensive depiction, much is lacking and has to be done.

To truly test Bacharach's insights, his argument needs to be formulated in a propositional form that is clearly testable with empirical data. In the present form of his theory, Bacharach tells us that leaders need to balance several dichotomies of X and Y. The problem is that he has not formulated in depth under which conditions each aspect is more important. That is, he does not specifically tell us under which conditions one should go after one thing or the other.

For Example, within the Balanced Leadership section of my thesis, I explore Bacharach's dichotomy of Directive and Facilitative Leadership. Leveraging the language of his theory, I attempt to define, as best as I can, the various conditions by which a leader should make use of each type of leadership. However, the fact remains that attempting to test each aspect of his theory with data requires that the conditions affecting them be better defined. In that sense, his original work, and by extension this thesis, is lacking.

Additionally, for his theory to truly work, what's also needed are clearer propositions that can be tested using large data sets. I believe that by creating the above illustrations, I have gotten one step closer to developing these testable propositions. That said, there is always a limitation when using such illustrations as I have. One of the most important of these is my

failure to interview leaders. In its present format, this thesis currently lacks interview material. Adding it would have enabled me to record the actual views of organizational leaders regarding the various aspects of Bacharach's theory. Additionally, I would also have gained the opportunity to examine its validity by recording their firsthand accounts of its practical application within the real world.

As I go through my thesis, I can clearly see that these various additions would further enhance its empirical robustness. However, I am confident that it has fulfilled my initial goal of acting as an in-depth illustration of Bacharach's perspective. Specifically, I am confident that in its current form it has furthered Bacharach's managerial synergy frame through its depiction of its various components via the use of organizational examples. Leveraging them has enhanced the relevance and robustness of each aspect of momentum within the context of real world organizations.

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