

Some Shackleton Leadership Lessons



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Alan S. Mann
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Shackleton Leadership



Ernest H. Shackleton
1874 - 1922

Source Acknowledgement

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Shackleton Leadership

ENDURANCE

(August 1, 1914 - August 30, 1916)

On August 1, 1914, Sir Ernest Shackleton and a crew of 27 set sail for the last unclaimed prize in the history of exploration: the first crossing on foot of the Antarctic continent. His goal was to land a six-man trans-Antarctic team in November and make the 1,500 mile crossing in one summer.



Their ship, The *Endurance* was a 144 feet long by 25 foot wide, 300 ton wooden barquentine built of planks of oak and Norwegian fir, some up to two and one half feet thick. Sheathed in greenheart, she was built for maximum strength. Power came from both sail and a coal-fired steam.

As the new owner, Shackleton renamed her *Endurance* after his family motto: *Fortitudine Vincimus* - "by endurance we conquer."

Along with her crew of 28 (including a later-discovered stowaway), were 69 sled dogs. Pay was \$240 for each of the 11 seamen and \$750 for each of the 11 scientists.

August 1, 1914 - January 18, 1915

The last port of call was South Georgia Island, which was primarily inhabited by Norwegian whalers at the East coast stations at Grytviken, Stromness, and Husvik. The whalers told Shackleton that ice conditions in the Wedell Sea, that he needed sail through, were the worst in memory, with pack ice extending far to the North.

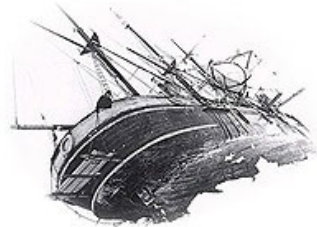
Shackleton held the ship at South Georgia for a month hoping the ice would diminish. Despite the warnings, the expedition left on December 5, 1914 for Vashel Bay, Antarctica, taking navigational routes that he believed would avoid the majority of the pack ice.

The *Endurance* encountered the first pack ice just three days later. For the next six weeks, Captain Frank Worsley, wove through the loose floes of pack ice, often using the ship as a battering ram. The surgeon, Macklin, observed, "I have a sneaking suspicion that he went out of his way to find a nice piece of floe at which he could drive at full speed and cut in two; he loved the shock."



Shackleton Leadership

January 18, 1915 - November 21, 1915



"Suddenly the floe on the port side cracked and huge pieces of ice shot up from under the port bilge. Within a few seconds the ship keeled over until she had a list of thirty degrees to port."
(Shackleton, South)

On January 18, 1915 at Latitude 76.27 S, Longitude 28.46 W, one day short of her destination, *Endurance*, entered thick pack ice. Shackleton and Worsley decided that rather than tax the engine by trying to break through, that they would wait for an opening. During the night however, the ice closed around the ship and a Northeasterly gale arose compressing the ice against the continental shore, holding the *Endurance* fast. Within a few days, they realized that they were trapped in the drifting pack ice until the spring, some nine months away. Shackleton declared the ship to now be a winter shore station, and suspended some of the typical "at sea" activities.

Expedition photographer, James Hurley wrote in his diary, "It is beyond conception, even to us, that we are dwelling on a colossal ice raft, with but five feet of water separating us from 2,000 fathoms of ocean and drifting along under the caprices of wind and tides, to heaven knows where."

The ice continued to exerted tremendous pressure on the hull of the ship, causing her to simultaneously rise at her bow and heel over. The ice pressure continued for weeks; Shackleton realized he was watching the ship being crushed in slow motion. As the ship continued to list, he ordered the crew onto the ice for their safety, establishing "Ocean Camp." Each man was issued warm clothing and a sleeping bag, resigned to an indefinite time on the ice. They would share six multi-person tents.

Living on the ice pack was challenging. Temperatures ranged from the 30s to a low well below zero degrees Fahrenheit causing the sleeping bags and clothing of the men to be alternately sodden and frozen stiff. The ice floe they were camped on continued to drift north toward the open ocean. As March approached, Shackleton concerned about the dwindling food supply, ordered the provisions to be supplemented by fresh meat from penguins and seals



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Shackleton made two attempts to march to land, some 300 miles to the north, using the men and dogs to haul the lifeboats and sleds packed with food salvaged from the *Endurance*. Loaded, the boats weighed approximately one ton each. It proved impossible to haul them over the uneven ice. The boats could not be left behind, as Shackleton regarded them as vital to their survival when the ice melted. Having gone only 10 miles over several days, the men formed "Patience Camp" to wait and see if the floe would carry them closer to land. Within days, when some of the men reported feeling seasick, they discovered that the ice supporting their camp was so thin that they were actually feeling the swell of the ocean. It was clear that this camp would only be temporary.

On April 9, 1916, the ice pack under Camp Patience split during a collision with drifting icebergs, providing the open water escape opportunity they had been waiting for. Within hours, the men had packed the camp into the three lifeboats and began rowing to a yet undecided destination. Assessing his options, Shackleton directed them to sail to Elephant Island, approximately 60 miles to the North.

All boats arrived safely on Elephant Island after seven horrific days of battle with the prevailing wind, cold, blinding snow storms, seasickness, and ice.

April 16 - August 30, 1916

On the desolate, uninhabited island, the frostbitten crew overturned the lifeboats to create shelters, using remnants of the tents as some insulation against the 100 mph winds. Blubber lamps were the only source of light in their dim shelters.

Daily hunting expeditions were organized to keep the crew occupied and "sing-songs" in the evening relieved some of the tedium. The men were crowded into the lifeboat shelters, and survived by eating penguins and occasional seals; both were scarce at this time of year.

Shackleton, within days, realized that the chance of rescue from this remote island was nonexistent and that both the mental and physical condition of his crew was so poor that some might die within months. So selecting five of the crew, he planned to sail the 22 ½ ft. lifeboat, *James Caird*, to South Georgia Island, over 800 miles away. Help would be available at the island's whaling station. Navigation would be the responsibility of Worsely, using only a sextant.

The crew remaining on Elephant Island would be led by Frank Wild, Shackleton's Second-in-Command. In his memoir, Wild wrote "We gave them three hearty cheers and watched the boat getting smaller and smaller in the distance. Then seeing some of the party in tears I immediately set them all to work".



Shackleton Leadership

April 24 - May 10, 1916

Shackleton and his men set sail in the converted lifeboat that had been covered with any available wood and cloth from the original sails. A small sail had also been constructed. Knowing that the skies were perpetually gray and overcast, their chance of a clear celestial sighting to plot their position, was slim. Accuracy, however, for this journey would need to be critical. If they were off with their calculations by a few degrees, they would miss the island entirely and sail into the open South Ocean. But Shackleton was driven to succeed for his men on Elephant Island, believing that their plight was worse than his.

Worsely was able to take only four sextant readings during the trip, due to the nearly constantly overcast skies and continuous pitching of the small boat in the sometimes, hurricane-force winds.

Despite the overwhelming odds against success, on May 10, 1916 the *James Caird* landed on South Georgia Island. Shackleton attributed his success to luck. The condition of the boat and men during the journey forced a landing on the West side, across the island from the whaling stations. The condition of both the men and the boat prevented sailing around to the east side, so they would have to walk. While the island was only 5 miles across, snow and terrain conditions could make the trek considerably longer. Adding to the challenge was the fact that no person had ever mapped the interior of the island.

May 10, 1916 - August 30, 1916

Ten days after landing, with severe frostbite, Shackleton, Crean, and Worsely started out on foot for the whaling stations across the island. With only a compass to guide them, they trekked over the mountainous, uncharted interior of the island, using screws from the *Caird* sticking out of the soles of their boots for traction.

The men carried only enough food for three days, a carpenter's wood cutter, and 90 feet of rope. On May 20, 1916, after walking over several mountain ranges and across glaciers without rest for 36 hours straight, they arrived at South Georgia's Stromness Station.

The following day, Shackleton organized a rescue of the men left on the other side of South Georgia Island, then planned for the rescue of the crewmembers who remained on Elephant Island. The thick ice surrounding the island however, made an immediate rescue impossible. After several failed attempts over the next three months, Shackleton, with the help of the Chilean tug *Yelcho*, was able to complete a successful rescue.



Shackleton Leadership

Crew of the *H.M.S. Endurance* (August 8, 1914 - August 30, 1916)

<u>POSITION</u>	<u>NAME</u>
Leader	- Sir Ernest Shackleton
Second-in-Command	- Frank Wild
Captain	- Frank Worsley
First Officer	- Lionel Greenstreet
Navigator	- Hubert T. Hudson
Second Officer	- Thomas Crean
Third Officer	- Alfred Cheetham
First Engineer	- Louis Rickinson
Second Engineer	- A. J. Kerr
Surgeon	- Dr. Alexander H. Macklin
Surgeon	- Dr. James A. McIlroy
Geologist	- James M. Wordie
Meteorologist	- Leonard D. A. Hussey
Physicist	- Reginald W. James
Biologist	- Robert S. Clark
Official Photographer	- James Francis Hurley
Official Artist	- George E. Marston
Motor Expert and Storekeeper	- Thomas Orde-Lees
Carpenter	- Henry McNish
Cook	- Charles J. Green
Able Seaman	- Walter E. How
Able Seaman	- William Bakewell
Able Seaman	- Timothy McCarthy
Able Seaman	- Thomas McLeod
Able Seaman	- John Vincent
Fireman	- Ernest Holness
Fireman	- William Stevenson
Stowaway (later steward)	- Perce Blackborow



Shackleton Leadership



Applying the Story to the Model



Shackleton Leadership



Shackleton Leadership

Leaders as Learners: Providing Direction

Personal awareness; Role in strategic planning; Leadership models; Leadership communication

Effective leaders are self-aware. They understand their goals, motivations, strengths, and challenges.

- Shackleton had a vision – he wanted to be an explorer. As a child, he would often be found in the yard digging to Australia.
- At age 15, he announced that he wanted to be free and have a live on the sea, looking to escape the schooling that was “doing no good for my character.” In the Spring of 1890, he joined the merchant marine with the goal of simply become motivated enough to finished school. He never went back.
- He was homesick and unhappy at sea and the work was more difficult than he had imagined, but always remembered that he had made the choice. While under no agreement to stay, he refused to quit, needing to see his commitment through. He wrote in his journal that he “dreamed prodigiously about big things ahead, big things in the nature of adventure.”
- Every two years he took the next exam to advance to a higher position. By age 24 he had earned his master’s certificate at age that allowed him to captain any ship in the merchant marine fleet. The force of his personality had a magnetic effect on his superiors and colleagues, and he was learning that he craved the center stage and success. He also learned that a single person could change an entire work environment.
- In 1901, he joined an Antarctic expedition, *Discovery*, as a junior officer. On the expedition, led by Robert Scott, he was the life and soul of the ship all the while doing exceptional work. His presence compelled confidence. Scott sent him back to England before the end of the expedition due to illness; he always vowed to return. In 1914, he set up an office for the **Imperial Trans-Antarctica Expedition** at Number Four New Burlington Street in London with the goal of transversing Antarctica.
- Shackleton always had a clear direction and vision of where he wanted to go and he constantly prepared for success. With his experience on previous expeditions he had an appreciation of what aided success and what led to failure. He also planned for contingencies (often shown through the selection of materials and specific crew members). But, he saw no obstacle that he and his teams could not overcome. Shackleton was driven to be successful.



Shackleton Leadership

- Truth in Leadership: Applicants for the Trans-Antarctic Expedition were found through an ad which stated, “Men wanted for hazardous Journey. Small wages, bitter cold, long months of complete darkness, constant danger. Safe return doubtful. Honor and recognition in case of success.”
- When selecting his crew, unity and loyalty served as the basis. Teamwork was a goal, rather than a simple ingredient for success.
- Hierarchies were flattened by requiring every person share all the work on the ship. He swapped work between “ABs” (able bodies) and “BAs” (Bachelor of Arts) making sure that each took on responsibilities from the other category. Scientists performed ship work and seamen helped take scientific readings. Back-up in responsibilities was essential and it made everyone feel valued and equal. Everyone took his turn steering the ship, taking watch, and keeping the furnaces fired. They took turns on their knees, scrubbing – this was not always well received, but competed. Additionally, all items, even luxury items, were rationed equally. Shackleton led by example and never asked a man to do work that he would not have.
- Through high morale, he inspired the type of loyalty that allowed his men to live in the below-zero weather without depression or mutiny. The *Endurance* had become the center of the universe to the men and they felt that nothing else mattered as long as the ship provided some form of warmth and comfort.
- Shackleton gave his men responsibility and sufficient independence. In crisis, he gathered the men around and spoke to them in a calm confident manner, giving a realistic appraisal of the situation, outlining options, and offering a clear plan. He thanked them for their past efforts and asked them for their continuing support. Knowing that he had their needs in mind, they pledged their loyalty.
- Shackleton would often speak to the men to maintain morale. He typically used simple, confident messages in brief sentences reminding the men that through hard effort, clean work and loyal cooperation they would make their way home. Each time that Shackleton addressed his men, he left no doubt that he was in charge. Even when the ship was eventually lost and they were sleeping on the ice, they caught his optimistic spirit. Every man among them had total faith in Shackleton and knew that if any mortal man could lead them to safety, it would be him. Diaries would later show that, among the men, there was little despair or fear with their situation.



Shackleton Leadership

Making It Real

1. Shackleton looked out into the next century for his goals and vision. How can a leader best develop a sense of long-term vision within his/her group?
2. Consider the better leaders in your organization. What do they do particularly well when setting direction? Discuss the strategic planning process used in those organizations.
3. What are some of the beliefs that better leaders have about accountability to their teams, their direct management, and their organization?
4. Effective leaders understand the balance of establishing a goal or vision, and empowering team to handle the day-to-day issues. What are some specific actions that effective leaders do to make that happen?
5. Shackleton consistently sought input from his team, whether or not he eventually used it. Discuss how an effective leader that you know uses this technique.



Leadership Compass

1. Leaders are willing to venture in new directions, seize new opportunities, and learn new skills.
2. Leaders broaden cultural and social horizons beyond their usual experiences and learn to see things from different perspectives. Differing perspectives enable greater flexibility when faced with new problems.
3. Leaders are bold in vision, but careful when planning. They take calculated risks and back the vision with meticulous planning focusing on success.
4. Leaders keep the door open to staff members and are generous with information. Well-informed employees are more eager and better prepared to participate.
5. Leaders understand limitations and never insist on reaching a goal at any cost. Goals must be achieved at a reasonable expense and without undue hardship.
6. Leaders learn from past mistakes – theirs and others.



Shackleton Leadership

Collaborative Leadership: Know who we are

Project leadership; Leading effective teams; Leading by example; Choosing & maintaining employees

- Shackleton handpicked all members of *Endurance*'s crew, starting with two who had served him and performed exceptionally well on a previous expedition. His second in command was Frank Wild -- a man he knew was loyal and shared his views. For the captain, he hired Frank Worsley -- a man he considered bold and eccentric.
- Since Antarctica is one of the coldest and inhospitable places on the planet, he knew that he needed to carefully select men who could endure long months of darkness and cold, live in close quarters, and survive without outside communication. He considered temperament and character as important as ability.
- Interviews were unconventional to find unique talent. Enthusiasm was more important than actual answers. He listened for subtle clues regarding how each candidate would be as a team member. One of his standard questions was whether a candidate could sing. He selected optimists and people who were generally happy, since "loyalty comes easier to a cheerful person than to one who carries a heavy countenance." He selected one candidate specifically because he could play the banjo, calculating that it would be an important talent as the expedition wore on.
- Everyone was a utility man. During the interview process, he looked for men who would jump at even menial tasks. Position in society played no role in the hiring decision. He was clear that, once on-board, a doctor was as likely a take in a sail. He hired the expedition's photographer because he knew that he had a background in metal working -- a skill he believed could be valuable.
- Once each man was hired, Shackleton wrote him a personal letter making certain that he knew exactly what was expected of him. To him, this personal contact was critical from the time of hire and continuing beyond the expedition's formal end.
- He insisted on providing the finest and most up-to-date tools for his men, believing that shoddy tools wasted money and time and could threaten lives. Everything on the *Endurance* -- to the toothpaste -- was the best available at the time. Shackleton allowed the men who would be using the equipment to make the purchases.
- Team harmony was critical. When the *Endurance* first sailed south from England, it made ports of call at Madeira, Montevideo, and Buenos Aires. Before setting out for South Georgia Island, Shackleton replaced several seamen because of unacceptable behavior, declaring that he owed it to the others.



Shackleton Leadership

- He required routine and order believing that it maintained an atmosphere for security and productivity. A routine, he felt, kept the men's minds occupied and free from boredom.
- Shackleton encouraged his men to work and play together to create an air of camaraderie. He focused on unity believing that it was the one thing that would allow him to achieve his goals.
- He judged his men on two levels—job performance and loyalty – with loyalty being far more important.
- While everyone might not have had equal status, all were equally valued and respected. Assignments were rotated so each man had a turn working with all others. If he had strong feelings about individual men, they never became visible. Tight bonds developed between the men.
- For important teams, Shackleton grouped men according to personality and friendship. For routine or less important jobs, selection was random. He never asked his men to do anything that he would not.
- When the *Endurance* became locked in pack ice, just eighty-five miles from their destination, Shackleton halted all regular routine. He ordered the men to pursue every possible means of extricating the ship from the ice of the Weddell Sea, including using ice picks and saws in attempts to reach leads sighted sometimes hundreds of yards away. While these labors were ultimately futile, he thought it was useful to have the men experience this firsthand, so they would neither question their predicament of having to "winter over" nor become bitter with "what ifs." It represented an effort the men could be satisfied with as an effort to save themselves.
- Shackleton's calm and confidence in the more dire circumstances were inspirational to his crew. Commenting on Shackleton's reaction to their inability to free the *Endurance* from the ice, Alexander Macklin, the ship's doctor wrote, "Shackleton at this time showed one of his sparks of real greatness. He did not rage at all, or show outwardly the slightest sign of disappointment; he told us simply and calmly that we must winter in the pack, explained its dangers and possibilities; never lost his optimism, and prepared for winter." Many on his crew considered him one of the greatest optimists they ever knew and filled their diaries with notes of adventure and daily living, rather than fear and danger.
- Shackleton never publically discussed the weakness of his individual crew members. Instead, he gave them assignments or team members that would develop them.



Shackleton Leadership

- While Shackleton was called "The Boss" by his men, he did not differentiate himself from them. When the crew moved off the ship to a camp on the ice, Shackleton ensured that neither he nor his officers received preferential treatment. He chose to tent with the two most temperamental men, to spare his other crew and keep the optimism alive.
- With the ship lost, he was concerned about finding challenging and meaningful work for the men. Most of the effort was centered about improving living conditions for the men and the animals. The scientists maintained their studies; others painted and mended clothing and boots. The men were far from bored and truly felt busy.
- He continued to maintain routine among the crew. The largest duty was the care and exercise of the 69 Canadian Sledge dogs on board. Divided into six teams, all members of the crew took turns exercising the dogs on the pack ice daily. He encouraged intra-team competition by encouraging an elaborate Antarctica Dog Derby where teams of dogs would compete in a timed race. He knew that this would have the dual benefit of keeping the men occupied and motivated as well as keeping the dogs in shape.
- Shackleton kept a balance of fun and work, never really dividing the two, but never letting one overtake the other. Games and social events were scheduled for each Saturday night and rarely missed. He insisted that everyone participate to avoid isolation and homesickness. He never single out individuals as friends or part of a personal inner circle.
- His concern was always for his men undertaking whatever he could to get them home alive. During the lifeboat journey to Elephant Island, "The Boss" stood at the tiller for hours without rest to demonstrate his unwavering goal of success. Later, during the 17-day trip to South Georgia Island, he constantly monitored the health of his crew, calling for hot drinks for all when one seemed extra cold, so as to not single out any one person. His men were his primary concern.
- The men never blamed Shackleton for getting them into trouble. On the contrary, they felt sorry for him missing a personal goal and losing much of his money and maybe his reputation. No one had to earn his respect or attention; he gave it freely. This won him their unwavering loyalty.



Shackleton Leadership

Making It Real

1. When you coach others about hiring decisions, what do you help them look for with new employees?
2. What about the Shackleton experience resonates with your leadership practices?
3. How do effective leaders in your organization go about obtaining the resources that their teams need for effective performance?
4. What do you consider the single most important team leadership characteristic? Discuss your position.
5. Considering your team as well as their individual goals, what developmental activities would be appropriate at this time?



Leadership Compass

1. Leaders lead by example. They help with the work they assign others, knowing that it gives them the opportunity to set a high standard and show respect for the job.
2. Leaders breakdown traditional hierarchies and cliques by training workers to do a number of jobs, from the menial to the challenging.
3. Leaders hire those who share their vision. Creative interviewers find unconventional people. They go deeper than job experience and expertise and ask questions that reveal a candidate's personality, values, and perspectives.
4. Leaders help their crew do top-quality work, giving them the best equipment affordable, since working with outdated, unreliable tools creates an unnecessary burden.
5. Leaders give consistent feedback on performance, knowing that most workers feel they don't get nearly enough words of praise or encouragement.



Shackleton Leadership

Leading Effective Organizations: Building capabilities – Individual / Organizational

Strategic planning; Ethics/Diversity; Change management; Creativity & Innovation

- When the *Endurance* set sail from England, Shackleton was clearly interested in satisfying several goals. Since he had pre-sold photographic and journalistic rights to his exploration, he had a series of benefactors that he needed to support with the exploration's success. He was additionally concerned with the safety of his ship and men. He was meticulous in his preparations to make certain that he had the correct crew and support provisions to accomplish the goals without extraordinary risks.
- Shackleton hired men from all careers and social strata. He was more concerned with skills and temperament than education or social class. He scheduled the men to work a variety of jobs (e.g. the surgeon also tended to the sled dogs) which resulted in better team work, reasonably unaffected by egos.
- Shackleton fired several seamen during the initial leg of the expedition, for being disruptive and for being away without permission for days. Then, not wanting to strand them, he helped them find new jobs on a steamer returning to England.
- During the trip south to Antarctica, the *Endurance* encountered significant pack ice, requiring several course changes, including a change from the original landing point. Success of the expedition was critical, so when weather or human conditions jeopardized completion of the original goal, calculated changes would always be made. Accomplishment of the goals was more important than staying within rigid procedures.
- Living on the ice floe was dangerous, so he planned a march toward land. Abandoning all nonessential provisions, they packed two lifeboats and the sleds. Dogs pulled sleds, while men pulled two boats. The process required 15 men in harness to pull one boat about one-half mile, then go back for the second boat and bring that forward. After covering less than a mile during the first day, he reversed the timing having the men pull the boats at night when the cold nights hardened the snow. Shackleton halted the march when after days of work; the men had progressed only 10 miles.
- Shackleton's door was always open and he was seen as approachable. Every man's opinion was important in decision-making. Every change of plan was freely discussed and commented upon. No changes or dangers were hidden.



Shackleton Leadership

- During their stay on the ice floe, Shackleton put into action many of contingency plans that he had meticulously refined over the previous months. “The disaster had been looming ahead for many months,” he later wrote, “and I had studied my plans for all contingencies a hundred times.”
- Upon reaching Elephant Island days later, the crew prepared for encampment until they could be rescued by a passing whaling ship. Within 10 days, however, Shackleton came to the realization that, with their current physical and mental condition, all men would not survive. He always believed that in crisis extreme risks were often required, and ordered the *James Caird*, at 22½ feet the largest of the lifeboats, to be prepared for him to sail it over the South Atlantic Ocean to South Georgia Island, 800 miles away.
- He selected his crew based not only on talent, but also temperament. Two were included because he did not want to leave them and their negative personalities on Elephant Island where optimism would be required for survival.
- When the boat was ready for the over sea trip to South Georgia Island, Shackleton gathered the full crew to announce that Frank Wild, his Second-in-Command, was now in charge. He reinforced that the men would be left in very capable hands.
- The journey to South Georgia Island was challenging with huge swells, gale-force winds, and freezing rain. Although the cloud cover allowed for only a few sextant readings, Shackleton and his five-man crew arrived at West side of South Georgia Island, completing a journey that no other person had survived in a boat as small as theirs.
- Sailing to the whaling stations on the East side would require an over-water trip of another 150 miles. With the deteriorating structural condition of the *Caird*, the dismal physical condition of the crew, and the current storm-filled weather pattern, the trip was unthinkable. Shackleton decided that they would go over land. Although five miles straight across, the actual walking distance was unknown, since no one had ever ventured more than a mile inland and the path would take them through ice covered mountains and over deep canvases.
- Adapting and refocusing to the situation at hand, they prepared for the over-land trek. Using screws from the *Caird* in their shoes for traction, and leaving the tents and sleeping bags behind, Shackleton and Second Officer Tom Crean, and Captain Frank Worsley left for the whaling station. The trip was difficult requiring many recalculations along the way. After a 36-hour journey with only a few minutes of sleep, they found themselves within sight of the whaling station they left some 17 months before, having covered a total walking distance of 22 miles.



Shackleton Leadership

Making It Real

1. How can more innovation be encouraged within and among our teams?
2. What ways can an effective leader use to encourage teams to take calculated risks?
3. Shackleton consistently confronted the generally accepted ways of doing things. Discuss some calculated risks that we as effective leaders should be taking at this time.
4. Using some of the techniques adopted by Shackleton, how can leaders demonstrate confidence in leaders and teams that report to them?



Leadership Compass

1. Leaders make certain they develop some high performing teams to handle the most challenging situations with internal and/or external clients.
2. Leaders allow and encourage innovation from team members and truly empower them to take independent action.
3. Leaders cultivate a sense of compassion and responsibility for others, understanding that bigger impact on the lives of those who report to them than they typically imagine.
4. Leaders are willing to change their minds and allow team members to change theirs when a plan is not working, understanding that innovation is not always successful on the first attempt.
5. Leaders show confidence to those acting in their place. They understand the importance of having their team see that the same level of competence is being maintained during absences.
6. Leaders give the worst assignments to the workhorses who do not complain, but then let them know that they are receiving an over-sized task that they are being counted on for completion.



Shackleton Leadership



7 Important Leadership Lessons



Shackleton Leadership



Shackleton Leadership

Lesson #1: Be passionate about your long-term vision; accomplish it with short-term objectives

Shackleton's vision began when he was a child. His goal was to be an explorer. He fulfilled several short-term goals in life, all toward the long term vision of successfully completing a mission at Antarctica.

- Once established, to keep a vision viable, he made certain that his men saw progress toward its fulfillment. This included the continuation of scientific activities throughout the experience, continued physical conditioning of the dogs and the men, and, as possible, moving the expedition forward.
- When the crew was forced to move on to the ice, Shackleton focused the men on the goal of survival and self-rescue. His goal was now to get all his men home safely.
- Shackleton understood the importance of keeping momentum -- dragging boats, hiking to solid land, chipping ice to free the boats, keeping the dogs and men exercised, having sled races to keep men and dogs trained. Each dog team leader was tasked with developing an effective team. He believed in always having a mission, because at the darkest hour, the mission might be the only thing lighting your path.

Considerations for Leaders:

Before a leader can communicate the vision, it must be crystal clear to himself or herself. Make certain that you understand the vision of your organization.

1. What are some of your key opportunities for short-term actions toward the fulfillment of the overall vision or mission? What specific actions can you take now to increase motivation and moving forward toward the goal?
2. What are some routines or structured procedures that need to be developed and implemented to increase the stability of your organization?
3. Is there a new goal that needs to be developed?



Shackleton Leadership

Lesson #2: Be a role model – set a personal example.

Leaders need to be visible. Let people see that you are leading.

- Shackleton was a very visible leader. He was fanatical about taking his turn with both the best and worst of jobs during the expedition. For example,
 - On the morning after the crew abandoned the sinking *Endurance*, Shackleton rose early in the morning to serve hot milk to the men.
 - On the open water trip from Camp Patience to Elephant Island, he stood for days at the stern of the *James Caird* taking his turn with navigation.
- Shackleton understood the power of communicating through behavior and symbols. To emphasize the importance of traveling light, he threw a handful of gold sovereigns into the snow, along with a gold cigarette lighter. He then tore a single page from the Bible given to him by the Queen, and placed the rest of the book on the snow next to the gold. These gestures inspired members of the expedition and dramatized what needed to be done to survive. Shackleton's behavior stands in sharp contrast to leaders who underestimate the extent to which they are watched by their employees, or those who send inconsistent messages--such as insisting on maintaining extravagant personal office space while demanding that others cut costs.

Considerations for Leaders:

Team members watch leaders very carefully knowing that their actions are sometimes more representative than their words. Make certain that your works and actions are in sync.

1. Think about the priorities of your intact or virtual team. What are examples of new ways that you can “visibly lead?” What might be important components of a “visibility plan?”
2. What are some memorable symbols that you can work into your leadership experiences?



Shackleton Leadership

Lesson #3: Set and maintain an optimistic tone, but be realistic.

Finding the right balance between optimism and realism is a key leadership task in any situation, but particularly when the team is experiencing adverse conditions.

- One of Shackleton's greatest strengths was his ability to build an unwavering sense of self-confidence in his men--they came to believe that they could overcome any obstacle. He never offered a position to his men other than that they would successfully get home.
- Shackleton always tried to consider the important messages that symbolic activities might unintendedly send. For example, one time when the food supply was dwindling, Shackleton opposed continuous hunting of seals, fearing that it would symbolize the belief that they would not be rescued soon. He sought, but ultimately ignored, the counsel of his officers who argued for the hunt.
- Accounts of the expedition also reveal the weakness that emerges when unrealistic optimism blinds a leader to harsh reality.
- Optimism was also shared by those he left in charge. During his voyage from Elephant Island to South Georgia Island, he left his Second in Command, Frank Wild, in charge of the party left behind. Continuing the optimistic tone of Shackleton, Wild would wake the camp each morning by declaring, "Lash up and stow, boys, the Boss may come today."

Considerations for Leaders:

1. Think about a current business challenge you are having. What can you do to instill optimism in your team? How can you frame the situation in a positive way?
2. How do you stay connected with reality? Are you confident that people will give you bad news?



Shackleton Leadership

Strategy #4: Reinforce the team message constantly; Minimize differences

Successful leaders help facilitate the establishment of a shared identity for the team, understanding that any disharmony might mean the difference between success and failure.

- Shackleton understood the power of a cohesive group, and he was convinced that their greatest chance of survival rested on staying together. “We all live or die together.” As a team, each person's contribution was unique, ranging from physical strength to expertise in navigation.
- He went out of his way to ensure equal treatment for all, even when allowing for special privileges or assigning chores. In one case, he went so far as to berate the cook for giving him preferential treatment.
- Shackleton was called "the Boss" by team members, a term that communicated both their affection and respect. But he was never physically aloof, and never used his position to avoid sharing the hardships of the journey. Although there were significant differences in temperament, social status, and careers (professor to able seaman), the team became a "classless society," and an unusual degree of mutual respect and caring emerged as a result.
- He kept team members informed and thinking about solutions. Help people understand the task to be done and their part in helping with the overall effort. Shackleton formed a “directive committee” of inner circle advisors to help him make the hard decisions.
- When they moved to the ice, there was the issue of sleeping bags -- custom-created, reindeer-skin bags that were especially protective from the cold. There were only 18, since they were originally for the team that would transverse Antarctica. The remaining 10 men would sleep in wool bags. Distribution was by lottery – in which Shackleton did not participate. He had already decided to sleep in one of the wool bags.

Considerations for Leaders:

1. When you consider your team, are there “class” or “status” differences? What causes them? What can you put in place to eliminate them? Would people consider you as an observer or getting in the trenches with them?
2. Does the culture of your team reinforce courtesy and mutual respect? Discuss your thoughts.



Shackleton Leadership

Lesson #5: Have fun. Find things to celebrate.

Fun, humor, and celebrations are some of the most powerful leadership tools; they can help break down differences and create camaraderie.

- Shackleton understood that strong morale is not accidental. He encouraged a wide range of humorous and lighthearted activities, taking every opportunity to get the men together to celebrate something. Whether it was “Midwinter Day,” or national holidays, or the anniversary of the day that they started their journey from South Georgia Island, these celebrations were critical.
- One day in May, all the men shaved their heads. It was their mid-winter madness, causing them to look like “a cargo of convicts.”
- When the crew abandoned ship for the final time, Shackleton insisted that Hussey take a 12 lb banjo, believing it would be “vital mental medicine” for the long dark days and nights ahead. The banjo stayed with the men through the entire ordeal. It was considered an essential item for survival.
- Find something to laugh about.

Considerations for Leaders:

1. What events do you celebrate? Do you look for the small wins as well as the larger?
2. Are there ways to engage your team in more fun activities on a regular basis?



Shackleton Leadership

Lesson #6: Master conflict -- deal with anger in small doses, engage dissidents, and avoid needless power struggles.

Conflict is part of team work. Positive conflict brings about important creativity.

- Although there were many minor frictions within the group, these arguments were never destructive. In fact, Shackleton believed that "productive bickering" helped ensure that tensions never built to the point that serious disagreements ensued.
- Shackleton was also a master at warding off any damage to group morale that might be caused by malcontents. Shackleton deliberately assigned two "troublemakers" to his own tent so that he might listen to their complaints and try to boost their egos.
- Although it is tempting to keep problem individuals at a distance, the strategy of embracing dissidents is the course to take under conditions of adversity. Shackleton was also successful in avoiding power struggles. On the second sled march, for example, the oldest member of the expedition mutinied, refusing to go on. He argued that he had agreed to follow orders "on board," but since *Endurance* had sunk he was under no further legal obligation. Rather than engaging in a fruitless debate, Shackleton allowed the carpenter to choose between working with team members and accepting Shackleton's authority--or working alone. As the rest of the expedition marched onward through the snow, the "one-man mutiny" quickly ended.
- When he heard about negative comments from some of the men about pay, Shackleton promised to pay the entire crew until they return to England, despite the dissolution of the tasks for which they were hired.

Considerations for Leaders:

1. Do you let conflict to bring the team or relationships to a standstill, or do you use it to move the team along? What are some effective methods that you use?
2. What are some changes that leaders can make to keep destructive conflict to a minimum and encourage productive and creative conflict?



Shackleton Leadership

Strategy #7: Be willing to take risk. Never give up.

Leader know that very few achievements are possible without taking calculated risk. They remember that there is always another move. Fear of failure is a waste of time and energy.

- At any point in the journey the team could have perished. They faced nearly insurmountable obstacles including solid pack ice, grueling sledge journeys, seal leopard attacks, and, finally, the glaciers of South Georgia Island. With each challenge, Shackleton encouraged the team to use their creativity and courage to find a solution.
- Shackleton did not take unnecessary chances, but when a risk was justified, he took quickly and prudently. When the men landed on Elephant Island, he knew that they were in a location where rescue was uncertain. Food was running low. It was time to calculate the chance of successfully reaching South Georgia Island – approximately 800 miles away. No one had ever accomplished a feat as this in a boat as small as 22½ feet. He reasoned that the trip would add nothing to the risk to the people left on Elephant Island and if nothing was done, they would all likely die anyway.
- When Shackleton and the two others found themselves stranded on a South Georgia glacier, 4,500 feet above sea level, they realized that fog was rolling in and that in a short while it would be dark. Hiking down the frozen slope, as the temperature dropped, could be fatal. Shackleton suggested that they use their rope to make a crude toboggan. They held onto each other and slid some 2,000 feet into the darkness and the risk paid off.

Considerations for Leaders:

1. Consider a risk that you might take to improve your department's situation. What are the best and worst case outcomes? What might the result of your "gut analysis" tell you?
2. What are some ways for you to bring the team together and accept a risky challenge? What might be a component of your communication to the team?



Shackleton Leadership



Leaving a Legacy



Shackleton Leadership



Shackleton Leadership

In their book, *A Leader's Legacy*, James Kouzes and Barry Posner ask, "How would you like to be remembered? What will be that lasting imprint by your work of being appreciated and remembered?"

This is an interesting question that many leaders should take the time to consider, so here is an opportunity. Please consider the questions below with regard to your legacy.

1. Who have you taught? What are you teaching them?

2. Name two people who are/can be your loving critics?

3. How are you/can you make your leadership personal?



Shackleton Leadership

Leaving a Legacy

4. How are you demonstrating “forward thinking?”

5. Where can you show more courage?

6. What would you want people to say about you and the legacy you left? (Try stating it in only one sentence!)
