

# Leadership Lessons

• Robyn Roscoe, BSc, PMP

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## Book

- *Shackleton's Way: Leadership Lessons from the Great Antarctic Explorer* by Margot Morrell and Stephanie Capparell (2001)

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Viking press 2001  
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## Shackleton's Way

- 8 elements of leadership, with examples from the *Endurance* expedition of 1914-1916
- Interviews with modern-day leaders who apply Shackleton's example
- Photo credits - All are Frank Hurley (RGS) except where noted

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## 1. Path to Leadership

- Shackleton prior to *Endurance* expedition
  - Earnest Henry Shackleton, born in Ireland in 1874
  - At 15, left school and joined the Merchant Marine.
  - 1900 – selected as an officer for the *Discovery* expedition (lead by Sir Robert Scott). Part of the “Great Southern March”
  - 1907 – *Nimrod* expedition
- Lessons learned in his early life would shape his leadership.

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## Early Lessons

- Follow through on your choices
- Have a career plan and identify mentors or those you want to emulate
- Focus always on boosting morale and maintaining the well-being of your crew
- Turn setbacks into opportunity
- Be bold but cautious, and be a respectful competitor

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## Endurance Expedition

- Planning started in 1913 for the Imperial Trans-Antarctic Expedition.
  - *Endurance* and *Aurora* (supply ship) acquired in 1914.
- Priorities for the project planning
  - Crew
  - Equipment
  - Scientific program
- First step: hire the crew.

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## 2. Hire an outstanding crew

- Character and temperament matter as much as ability
- Make key hires first and then involve them in completing the crew
- Hiring process appropriate to the project

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## Key Hires

- Key hires
  - No. 2 – Frank Wild for loyalty, cheerfulness, decency, strength, experience
  - No. 3 – Tom Crean for bravery, camaraderie, and potential

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## Unconventional Hiring



- Categories for applicant reviews
  - Mad, hopeless, possible
- Interviews with “the Boss”

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## Endurance Expedition

- *Endurance* departs England August 1914
- Shackleton and Wild stay in England to make final arrangements, join ship and crew in Buenos Aires in October
- Crew without their leader – in a shambles
  - Homesick, seasick, afraid, discontented, or
  - Drinking, carousing, disorderly

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### 3. Create a Spirit of Camaraderie

- Shackleton had learned early what didn't work in a crew
- Ultimate goal – unity amongst the crew from top to bottom
- Issues with the crew (besides no leader on the voyage from England)
  - Class
  - Occupations
  - Temperament

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### Leader takes control

- Observe the entire situation before taking action
- Once changes are decided, take action – don't be tentative
- Be accessible to entire crew

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## *Endurance expedition*

- Ship moves to South Georgia Island whaling station
- December 1914 – departure for Antarctica

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## *Leading underway*

- Order + routine = security and productivity
- Remove hierarchies – everyone does everything

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## Leading the Crew

- Shackleton was evenhanded – firm but fair
- Relaxation and entertainment critical and part of routine

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## *Endurance* expedition

- 18 January 1915 – *Endurance* stuck in pack ice, 100 miles from landing site
- Decision by Shackleton – spend the winter in the ship in the ice pack
- They would be trapped on the ship for nine months...

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## 4. Getting the Best from Each

- Take an interest in both professional and personal development
- Creature comforts keep up morale
- Provide tools and materials to work effectively and safely
- Match personality types and interests with work
- Constant feedback

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## Leading when stuck

- Assigned work based on interests and personality
- Cross-training and no hierarchy
- Insisted on activities to stay occupied and learn new things

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## *Endurance expedition*

- By 31 July 1915, ice pack begins moving
- 24 October, moving ice begins to crush the ship
- 27 October, decision by Shackleton to abandon ship
- For another month, they scavenged from the ship, and then it was crushed and sank

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## 5. Leading in a Crisis

- In a crisis, it is even more important that there is one leader and flat hierarchy
- Avoid monotony - stick to routine (especially w.r.t. food)
- Team needs to be happy, but also realistic and responsible - no slacking on tasks
- Lots of contingency planning and flexibility
- Keep malcontents close by to minimize effect on others and to try to win them over
- Seek advice but make decisions alone

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## Leading on the Ice

- Shackleton spoke to the men – asks for continued loyalty and trust
- Priority was to get ALL men to safety, keep them united, keep them free from despair
- Pare down possessions to survival only
- He has a plan - they will walk West, aim for 5 miles/day
  - After 8 days, they only moved 7 miles so decided to establish camp

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## Threat to Leadership

- During the march from the ship, carpenter McNeish refused to work
- Spoke abusively and loudly to captain Worsley
- Shackleton took McNeish aside and explained clearly who was in charge and that McNeish was to obey orders
- That evening, re-read ships orders to entire crew

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## Leading on the Ice

- Shackleton did the hardest thing at the time – nothing
- This camp lasted for three months
- When it was time to issue unpopular orders, Shackleton gave warnings, and then participated in difficult work
- Stayed ready to leave at a moments notice...

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## *Endurance expedition*

- Situation is:
  - 1,000 miles from any people
  - 180 miles to Antarctic mainland
- 08 April 1916 - ice breaks up under the camp
- Into the boats, heading west

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## 6. Forming Teams for Tough Assignments

- Know how to blend strengths of character and abilities on teams
- Ensure that teams have a clear leader
- Trust the team leaders, but keep an eye on individuals
- In difficult circumstances, leader should be visible and show strength
- Leader cannot be afraid to change decisions – don't stick to the wrong approach or direction once you see it is wrong

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## Leading through rough seas

- Boat assignments – each with a leader, crews carefully selected
- Strong easterly current and churning ice floes made westward progress impossible – decision to head for Elephant Island.
- After landing, and letting the crew sleep for 2 days, re-establish routine, including meals

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## Decision to split up

- Shackleton knew they couldn't survive long on the island, and that few were up to a return to the sea
- Crew converted the best boat for a long journey.
- The plan – get to South Georgia Island, 800 miles East
- The crew – Shackleton asked for volunteers, but had already decided who would stay and who would go
- When departing, made a very public display of transfer of leadership to Wild

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## *Endurance expedition*

- Shackleton gave Wild strict instructions: if we don't return by August, prepare another boat and sail for Deception Island (whaling station to the West)
- Left a letter with Hurley (photographer) transferring ownership of photos to him in the event that he did not return
- Miraculously, after 16 days at sea, the *James Caird* lands on South Georgia Island...on the wrong side

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## 7. Overcoming Obstacles to Reach Goals

- Analyse and then act - keep rumination to minimum
- When options are narrowed, it is necessary to increase risks in order to succeed
- Always remain aware of the needs of others
- Complete the whole job

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## Overcoming South Georgia Island

- Landing site was 30 miles overland from whaling station
- Shackleton, Crean and Worsley walked over glaciers, cliffs, mountains and lakes in just 36 hours to arrive at whaling station

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## *Endurance expedition*

- At Grytviken, whalers set out to rescue the three men on the other side of South Georgia
- 3 days later (13 May 1916), Shackleton, Crean and Worsley set out on whaler to Elephant Island
- 2 more attempts in June are unsuccessful
- Finally, on 30 August, they are able to get to island

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## *Aurora expedition*

- *Aurora's* captain was not a leader - lost control of crew and decisions early on in the voyage
- May 1915 - while the depoting party was on shore, *Aurora* broke free of anchor and was blown out to sea with the ice pack.
- Sept 1915 - still thinking Shackleton and crew were crossing over land, six men completed the supply caches as far as 88°23'S.

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## Aurora expedition

- July 1916 - the remaining 3 men in the depoting party return to the main base.
- By April 1916, *Aurora* was still in NZ. The remaining crew was trying to raise money to repair the ship and mount a rescue, but the expedition was broke

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## Leader Completes the Whole Job

- After the rescue of the crew from Elephant Island in August, Shackleton *did not go home*.
- December 1916, he joined in the rescue party and the refitted *Aurora* in NZ and sailed for Cape Evans
- January 1917, survivors are rescued - only then realizing that their supply efforts had been in vain

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## 8. Leaving a Legacy

- *Endurance* has become the most successful failure ever
- Leadership lessons endure today
  - Turn set-backs into opportunities
  - Be bold but cautious
  - Hire an outstanding crew
  - Unity amongst the crew from top to bottom
  - Match personality types and interests with work assignments
  - Take an interest in both professional and personal development
  - Be decisive - seek advice but make decisions alone
  - Be accessible and visible
  - Complete the whole job

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## *After Endurance*

- January 1917 - WWI was ongoing
- Shackleton could have retired, or toured the world with his story, or started planning another expedition...
- Instead, he used his talents and celebrity for the War Office, raising money around the world for England's soldiers
  - Several of the men who survived the *Endurance* and *Aurora* enlisted, and were killed in action in the war
- After the war, Shackleton looked South again...

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## Quest expedition

- 1920 - a new expedition to chart the coastline of Antarctica
  - 8 members of *Endurance* crew joined the new adventure (including the cook)
- January 1922 – en route to the start of the journey, Shackleton dies at South Georgia Island, at the Grytviken station where he'd arrived after *Endurance* just six years earlier
- Expedition was quietly ended, bringing an end to the Heroic Age of Antarctic Exploration

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## Shackleton's Legacy

- He wanted to write a book about “the mental side” of leadership
- He documented his beliefs and priorities for leaders:
  - Loyalty
  - Discipline
  - Unselfishness
  - Courage
  - Optimism
  - Chivalry
- His legacy is his example of determination, perseverance, energy, strength, optimism, courage, intelligence and camaraderie.

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## Shackleton's Way

- All of this in a single book? And more!
- The authors weave the lessons in with this incredible adventure story and vignettes that portray both the challenges of the expeditions and the brave leadership of Shackleton.
- More on this story?
  - *Endurance and Shackleton's Boat Journey* by Frank Worsley
  - *Shackleton's Last Voyage* by Frank Wild
  - *Argonauts of the South* by Frank Hurley
  - *South with Shackleton* by Thomas Hussey
  - *The Lost Men* by Kelly Tyler-Lewis
  - *South* by Earnest Shackleton