

AHCAP Education Committee Book Review – January 2017
“Master the Matrix: 7 Essentials for Getting Things Done in
Complex Organizations” By: Susan Finerty

Essential #1: Start with Partnerships (Jeanne McAuliffe)

- A matrix role is just one piece of the puzzle that fits in with multiple other pieces that aren't always seen or understood. Partnerships make the work flow smoothly.
- Partners change with each project. Think about who needs to be involved to get the job done.
- The Four Matrix Partnership Types: Integrated Partners; Collaborative Partners; Transactional Partners; New/Dysfunctional Partners. Not all partners are equal!
- All collaborative partnerships have needs to be met. Be sure the partnership fits the requirements of the business and the partners agree on the level of partnership.
- The Partnership Mindset: Don't Wait for Them – Invest in constructive behaviors that are aligned with your values and be a role model to others.
- Matrix partnerships are funded by gradual increases in trust, communication and constructive conflict. When a new or dysfunctional partnership starts to slide backwards, baseline investments are needed. The five baseline investments are:
 - Trust them
 - Be trustworthy
 - Set/reset communication
 - Clean up conflicts
 - Follow the Help-Me-Help-You Rules
- **Take-away:** In a matrix role, partnerships are ongoing at different levels. Fit matters and so does your mindset. The only one who can affect change in a partnership is you!

Essential #2: Get Goals Aligned (Kim Laukala)

- 4 ground rules for Goal Alignment:
 - It's bigger than you – There is an “and” not an “or” in every matrix goal.
 - Be realistic – You cannot be so optimistic that you don't make tough choices
 - Be ready to make trade-offs – Making trade-offs has potential to make most people feel the need to repay in-kind
 - Assume nothing – Ask questions, share information and clarify.
- You must have a huge focus on a few things
- 3 requirements for goal alignments in matrix roles:
 - Include the right people
 - Land on a limited set of goals
 - Keep goals in the foreground

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- You must have all three to ensure alignment. If you do not you will have the following:
 - Resentment – need to make sure to include the entire team (including managers) in the goal making process. This will help with the buy-in. Also let them know specifically what type of input this will be. Are they giving input so you can set a goal or is this a group reaching a consensus?
 - Select, restricted, limited. Fewer is better.
 - Make goals visible to everyone. Use goals to filter priorities. Use goals as a framework.
- The hunt for misalignments is EVERYONE’S job.
- Create a forum. Ask questions. Catch misalignments before they crash and turn ugly.
- Look for early warning signs.
- PICK YOUR BATTLES – if a goal doesn’t have a big impact on your team – let it go!
- If you fail to resolve – you may need to escalate to a person with more influence or authority.
- DON’T EVER CRY WOLF – don’t send a person on a wild goose chase.
- **Take Away:** Always follow the ground rules for matrix goal alignment: go back to the bigger picture; be realistic in what goals you can pursue; be ready to make trade-offs; and assume nothing
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Essential #3: Clarify Roles (Kim Laukala)

- Defining Roles: Most widely used method is the RACI chart which outlines who is:
 - Responsible
 - Accountable
 - Consulted
 - Informed
- Other variations
 - Responsible Responsible
 - Accountable Accountable
 - Perform Supporting
 - Inform Consulted
 - Decided Informed
- These charts force the teams to be very precise about the tasks and decisions in front of them
- Three guidelines for role clarity:
 - Don’t assume role clarity is the problem. Look at trust.
 - Use role definitions offensively not just defensively.
 - Don’t ever put it on the shelf.
- Before you jump in – step back and ask:
 - Why did this happen?
 - Is it worth confronting?

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- What is the best way to confront it?
- Assessing why a breach happens helps you assess the next step.
- **Take Away:** Use role descriptors to make sure marching orders are clear. Keep documentation accessible and user-friendly. Review why role breaches happen before jumping in.

Essential #4: Get Decisions Made (Pat Muenster)

- Five rules for getting decisions made in a matrix role:
 - Balance & toggle your decision-making styles – knowing whom to pull in, and when, is the key to balancing inclusion. Transparency is key and people need to know why they are being included or not included.
 - Watch your biases – this can impact your ability to understand and appreciate other perspectives/needs
 - Set it up right - name it, label it, set the criteria
 - Invest in agreement - Take a vote and ask what it would take to reach agreement. If the decision is a critical one with sticky political angles, consider bringing in a third party
 - Go the extra mile to make sure the decision sticks
- **Take-away:** Using a word that is no stranger to someone in our role, we need to be “flexible” in our approach when assisting in getting decisions made. Remember that although it may take time to determine the right individuals to include and “set up” the decision process, the investment in time helps you pick up speed in reaching agreement and successfully implementing the decision.

Essential #5: Flex Your Influence Muscle (Stephanie Sineiro)

- Trust is the most important matrix skill, and then you can build a relationship from it.
- Influence would be the second, it helps with building a relationship that you seek.
- There are some things that you can do something about, and some you cannot. So focus on the one’s that you can. You will achieve what you’re looking for.
- Select your Circle of Concerns, from low to high. Low meaning “let it go”, medium “keep an eye on it”, and high “tackle it”. This will keep you balanced.
- There are two types of people proactive and in the moment. Being proactive is “forging partnerships in the matrix”, building your trust by your willingness to be influenced, and doing your homework to make sure that you are attempting to influence your partner perspective. Without partnership you cannot influence.
- You must be able to “give and take”.

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- To Frame things we think is the most logical approach, because it's the easiest way to solve a problem. Taking a different approach may have a better affect.
- Be clear and simplify.
- The power of patience and perseverance. “Patience is a virtue”, it is a necessity. Because you will feel you had no success, when in actuality you have.
- Embrace the long-term investment. The most positive the history, the higher the likelihood of success.
- Try to influence things that you have previously let go because you didn't think you impact it. If you have tackled it before with mixed results, let it go and see how it plays out without your influence.
- When influencing two different bosses, will require different strategies. You can use one to influence, but don't overuse this. It can easily create resentment and politics between the two.
- Cross-functional and Project Team Matrices will likely be accountability in this type of matrix role. This role is in Essential # 7. Also when your team of people needs to influence someone outside the team, leverage team members. Not all influence needs must be met by you.
- **Take-away:** “In the Matrix roles, your accountabilities and responsibilities probably exceed your formal power. Lacking in power, influence is all you've got.”

Essential #6: Communication Without Assumptions (Lisa Stracek)

- Often assumptions aren't noticed until someone does or says something in direct conflict with that assumption – stop – ask yourself: How did that happen?
- First – slow down: listen to the ask and how it was communicated - what is missing: they don't know what you know. Are you communicating in a style that is helpful for you or for them?
- Sometimes we under-communicate then the “WHY” isn't obvious – this is then filled in with an assumption. Make the shift from assuming someone knows to they don't know, then communicate accordingly. When you are asked – your response matters – patience and sincerity. Sometimes hitting the forward button or using cc'd is not enough- let others know why they are cc'd. Understand their preference for communication – understand what they understand!
- Four things to keep in mind when communicating to others. There is a higher information need – those in your matrix need to know more than your peers in a traditional organization:
 - They don't know what you know
 - You don't necessarily know what they need to know
 - The reason behind your actions is important & not inherently obvious
 - When asked for information, your response matters

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- Information – if they don't know, the blanks will be filled in; finding out information from others makes one feel duped, lowers the trust and credibility; watch out for over-communicating - don't throw information around
- **Take away:** In a matrix role people have higher information needs – communicate accordingly. Cast a wide net...your boss should know, but real work gets done everywhere but up. Who feels the most in the dark?

Essential #7: Make Meetings Matter (Maria Iodice)

- Motivation and influence are two key requirements in matrix roles, and meetings can be your tool. In a matrix role, meetings are the forum for avoiding and resolving collisions and producing results by bringing people together divergent goals, opinions and experiences.
- Placing a value on meetings transforms them from an interruption to a critical function and opportunity.
- The six steps below are not optional or nice-to-have. They are required. This is what it looks like to *treat meetings like they matter*. You need to be diligent in these steps, whether you are planning a one-hour meeting or a one-week meeting.
 - Attempt to talk yourself out of it
 - Some good reasons to hold a meeting include: solve a problem, brainstorm ideas, make a decision, and plan/create. Some bad reasons include: discuss, explore, share information.
 - Never assume a meeting is the answer; consider your options.
 - Get really clear on your outcomes
 - Craft your agenda
 - Invite and prepare the right people
 - Facilitate the heck out of it
 - The key roles that a facilitator plays. Every group and every topic will require a different combination and proportion of these roles.
 - Keep focus
 - Connect ideas
 - Balance participation
 - Keep things moving toward a desired outcome
 - Manage time
 - Follow up and hold people accountable
- **Take-Away:** Realistically, there are plenty of meetings in your matrix that you participate in, versus lead. When you aren't leading the meeting or the project, trying to get others to adopt the principles in this chapter can be tricky. Here are a few subtle ways to shift other people's meeting behavior:

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- Guilt – Be the best meeting attendee ever. Ask questions, connect what people are saying, and redirect conversation. Be on time. Be disciplined. Guilt everyone else into behaving better
- Volunteer – Ask the meeting leader if they want your help in agenda planning. They may view this as a welcome relief.
- Demonstrate – Informally facilitate during the meeting – ask opinions, link, and contrast and compare comments.
- Coax – Ask questions to push a meeting leader to be more deliberate in thinking through the meeting.
- Be direct – The direct approach can also be used – just frame it in a way that is all about making everyone’s lives easier and advancing the project.

Putting it All Together:

- It all starts with you. Keep on doing it even when no one else is following suit.
- Don’t rely on just one essential for success. Make it your goal to improve in all areas.
- The seven essentials work in concert. If you or your team is struggling – look at multiple diagnoses and solutions.
- Change the conversation. Discuss issues in an objective way.