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Better Workplaces

Better Workplaces is a research initiative of the Sobey School of Business. It is a key focus in our ongoing effort to produce research that has a meaningful impact on the way we do business. The *Better Workplaces* research agenda is aimed at developing insights into the balance of factors that encourage positive organizational outcomes, including improved organizational performance and customer care, employee health and safety, good community-workplace relations, and ethical business practices.

One of the initiatives under the Better Workplaces umbrella is the introduction of this new electronic journal – *The Workplace Review*.

Mission

The mission of *The Workplace Review* is to become a regional forum where people can explore different perspectives of work.

The Workplace Review will emphasize research that is current and relevant, with a high potential for immediate application and impact.

Scope of the eJournal

The Workplace Review showcases the strength of international faculty who are in touch with day-to-day workplace challenges. Drawing upon our diverse community of researchers, from the Sobey School of Business and other Atlantic Canadian universities, the journal will reflect developing issues in the functional specialties of marketing, finance, operations, information systems, economics, accounting, and management. It will address issues such as personnel staffing and selection, human resource management, leadership and coaching, occupational health, industrial relations, spirituality, diversity management, corporate governance and business ethics. The journal will remain flexible enough to incorporate future or emerging issues. All articles will focus on the central theme of the challenges and opportunities surrounding work, working and the workplace, but will not necessarily reflect the views of Saint Mary's University and the Sobey School of Business.



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If you have something you want to say,

research or information you want to share, or comments or reactions to articles you've read in this issue, please write to us at the workplacereview@smu.ca.



Letter *from* the Editor

BY ALBERT J. MILLS

Welcome to the new look Workplace Review. Our new Managing Editor is Tony Yue, who has taken over from Wendy Carroll. Our very best regards go with Wendy who steered the Review through 2005. Wendy leaves us to take up a teaching position with Acadia University.

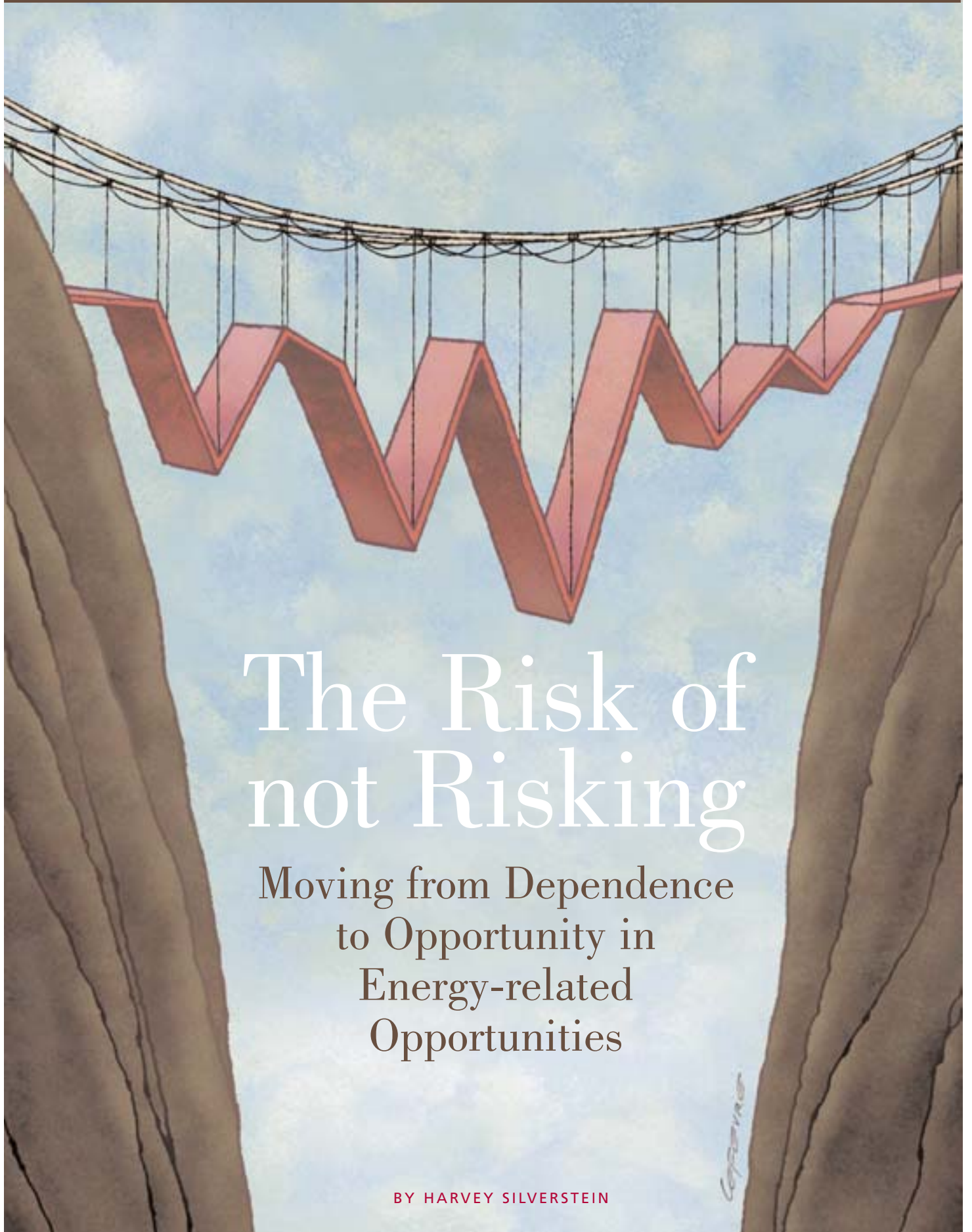
Another important change is the expansion of the editorial board to include business educators from across Atlantic Canada. The composition of the new board will be reflected in future editions, particularly in the range of contributors. While the overall direction and philosophy of the Workplace Review remains the same, we will be better placed to reflect best business practices and research across the region.

As part of the new look, we have moved away from specialized departments and columns to key articles focused around a themed issue, starting with the current issue focused on risk.

The issue leads off with a review of Yvon Chouinard's book *Let My People Go Surfing: The Education of a Reluctant Businessman*. Here Brad Long introduces us to Chouinard's approach to risk management through purposively limited and controlled growth. In the first of our feature articles Conor Vibert not only explains the value of internet surfing for competitive intelligence but provides several useful tips for managing organizational risk on line. From mining the internet to mining history, Peter Chiamonte and Tony Yue explore the lessons of Roald Amundsen's successful trek to the South Pole for modern management. In the second of our feature articles Chiamonte and Yue argue that there is much to be learned from leadership under conditions of great risk, particularly the need to pay attention to strategic detail, context, and the human factor.

Risk may reside as much in what we don't do as much as what we actually do. In our fourth article Gordon Cooke and Isik Zeytinoglu contend that a gendered training gap in Canada may be hurting not only the women who are excluded from equitable training access but also the companies who miss out on the development of a qualified pool available to move into higher-level jobs. Moving on to the value proposition, Sunny Marche provides useful tips for ensuring that each and every department and division in an organization develops a sense of their contribution to the overall difference between what people pay (i.e., the value) for goods and services and what those goods and services cost to provide. Finally, rounding off our current theme, Harvey Silverstein examines the energy sector to provide key insights into the risks involved in NOT taking risks.

We hope you like the changes we have made and, one way or another, we'd like to hear from you. We will endeavor to publish all relevant letters to the editor. Look out for our Fall edition when we will be dealing with the theme of sustainability. ○—



The Risk of not Risking

Moving from Dependence
to Opportunity in
Energy-related
Opportunities

BY HARVEY SILVERSTEIN

Risk can be defined in many ways. For some unknown reason, I have always attached a high perception of risk to missing out on real opportunities.

I have even heard that “luck” can be defined as merely the readiness to make use of an opportunity. Therefore since I have had the wonderful fortune to be lucky in life, love, and business, I attribute this to my willingness to take the risk on an opportunity before everyone else accepts it as proven, acceptable, or even completely safe.

What does this have to do with business and more directly with this issue of the Workplace Review? I intend to set forward in this brief article the thesis that there is an enormous area of developing business opportunity in the energy sector; here-to-fore ignored in Atlantic Canada (with one significant exception) and that we ignore at our peril. The peril I foresee is that we can wait until the opportunities are proven, miss the boat on establishing foundations in this emerging area, lose out on employment and new businesses, and end up dependent upon other companies in other places.

This will create even further workplace risk. After a recent presentation by Professor Linda Duxbury on generational differences in the Workplace, what became clear is that unless we provide exciting new challenges – frontiers – in the workplace, we will have an even tougher time to recruit bright people as the number of available workers shrinks dramatically.

My initial observation is historical and based upon the recent past. 1981-82 was the early days in the development and roll-out of the microcomputers that became the foundation of the Information Technology Industry and now what has been called the Internet Economy. Two other Haligonians and I started a company called Hypertechnologies Canada Inc. based upon obtaining the exclusive Canadian license for the first hard drive for the Macintosh Computer.

I remember well going to the local business community, the banks, and especially the government trying to convince them of the incredible opportunities that would come from deployment of this technology. Skepticism was great, risk aversion was most prominent, and Hypertechnologies Canada Limited wound up moving to Toronto where it was quite successful. The point here is not that my former company moved to greener pastures – but rather that many other companies did not stay or get started here because of the risk calculation perceived within our local business community.

I would suggest that the Maritime successes we now celebrate in the Information Technology Industry exist in spite of – not because of – our intolerance of “unproven” opportunities.

This brings me to the subject of energy. “Energy”, in the current vein, is usually perceived of as an amalgam of offshore oil and gas, coal legacies, developing wind power resources,

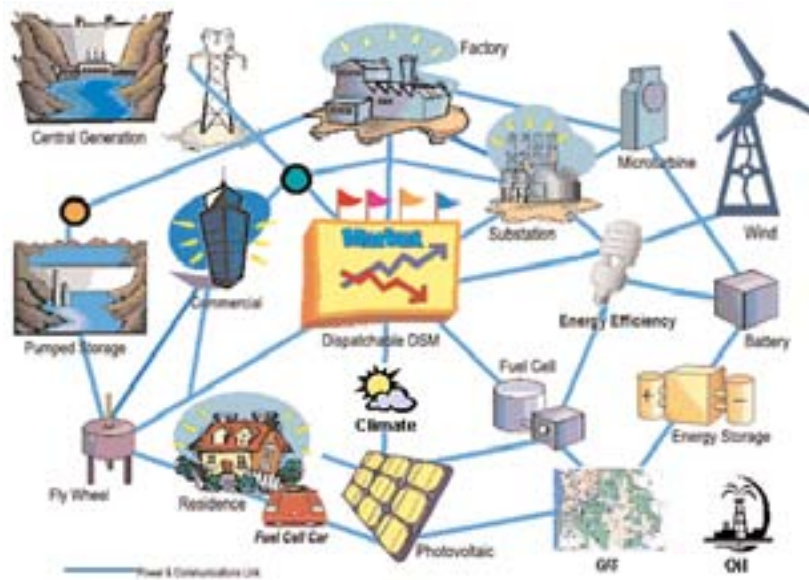
and the rate controversies and services of Nova Scotia Power. Our collective consciousness is almost totally focused on energy in terms of energy resources.

Perception of an Energy System

What I would like to propose is that we need to change our perception (or paradigm – to use the proper academic terminology) to one of energy as a complete system. Several years ago, in a study for Nova Scotia Power [1], I came across one of the best representations of an energy system model from the Bonneville Power Administration (BPA) based in Portland, Oregon.

The BPA is a federal agency under the U.S. Department of Energy that operates extensive generating facilities in the Western U.S. Their system model incorporates both existing and potential changes in the way energy and energy related information flows. It is not only a pictorial illustration of energy, and energy related communications flows, but each element in the model is hyperlinked to more extensive sources of information and resources about that particular element. While this model focuses primarily on the market and electrically related system, it is an excellent representative of the systems approach to managing energy. I have reproduced this model below [2].

ENERGY WEB:
A NEW KIND OF
NETWORK



DEFINITION OF ENERGY WEB: The integration of the utility electrical system, telecommunications system, and the energy market to optimize loads on the electrical network, reduce costs to consumers and utilities, facilitate the integration of renewable resources, increase electrical system reliability and reduce environmental impacts of load growth.

There are many implications to this model. To me, one of the most important is that intellectual capital of how to integrate and apply energy systems – and not just natural resources will become of considerable value in our 21st century. By intellectual capital, I include not only devices, patents, technologies, processes, and research and development but also the

knowledge of how to integrate and utilize these in the most cost-effective manner. I do not believe that energy-related intellectual capital is even on the radar screen for most of Atlantic Canada.

Before continuing, I must set out two further assumptions that are obvious to a significant portion of the population but definitely not agreed to by everyone. These assumptions are:

1

Consumption of fossil fuels (oil, natural gas, oil shale, and coal) is accelerating, and there is only a finite supply. (Depending upon a variety of assumptions our useable supply may range from 30 to several hundred years).

2

The green house effect is “real” and this as well as other major environmental concerns will have increasingly important economic and political, and social impacts on our choices for energy systems.

The Hydrogen Economy Concept and Assumptions

In addition to these assumptions – I would like to propose one more that I do not want to take the time and effort to argue in this article [3]. That additional assumption is that:

3

Hydrogen and hydrogen based technologies will come to play major role in the development, transmission, applications, and use of energy in our lives starting within the next 5-10 years and continuing well into our foreseeable future.

I do not intend to argue this assumption because there are national and international associations, innumerable international conferences, countries (such as Iceland, Japan, China, and even the U.S.), the European Union, billions of dollars and hundreds if not thousands of companies already accepting this assumption.

In very simple terms, hydrogen systems (or the “hydrogen economy”) concept is based upon the following principles with major long-term implications:

Hydrogen can be produced anywhere there is electricity and water using electrolysis. (Basically, running a low voltage current through water under certain conditions. This breaks the H₂O water molecule down into free oxygen and hydrogen). Canada has been a world leader in this technology since the late 1940’s when the Stuart Energy Ltd. installed large electrolytic converters at Niagara Falls. The Stuart Energy corporation has now been merged into the Hydrogenics Corporation and is still a Canadian company.

These electrolyzers can be added to solar, wind, hydroelectric, tidal, and ocean energy generators in order to capture all the electricity generated and store it as a transportable fuel.

When hydrogen is burned or used in a fuel cell – **the only significant environmental by-product is water. There is no Carbon dioxide produced.** (Under certain specific conditions, when hydrogen is burned under high temperature some nitrous oxides can be produced but the technology of how to minimize or eliminate this already exists).

Hydrogen can also be used to extend the supply of natural gas up to a mixture of about 20% with no change in piping, valves, storage technology, etc.

My intent now is to illustrate the scale and extent of this activity in the hopes of stimulating interest in this sector from both the public and private sector enterprises in this region of Canada. Opportunities can emerge if we now begin building some “intellectual capital” – knowledge – in the applications and implications of hydrogen energy based systems.

Ongoing Government Priorities in Hydrogen Systems

Many people are aware of and have heard about how Iceland has adopted as a national goal to become one of the first hydrogen powered nations in the world using geothermal and hydroelectric sources to produce hydrogen to fuel their country. The objective is to replace costly foreign petroleum with clean burning and locally produced hydrogen to run vehicles and even their fishing boats. What many people don't know is that the provincial government of Manitoba has already signed a memorandum of agreement with Iceland to share this knowledge and technology development:



“Manitoba and Iceland share many cultural and business ties as well as a common interest in renewable energy and hydrogen,” said Sale. “Iceland has taken a leadership role and gained considerable profile globally in the area of hydrogen development. Today's agreement will promote greater partnerships in this area between our two jurisdictions and will enable Manitoba to build on our recently unveiled initiatives including a preliminary report on hydrogen development and a unique hybrid fuel cell bus demonstration project.”

The MOU states that Manitoba and Iceland will pursue the potential for joint initiatives on hydrogen development. The two jurisdictions will also investigate the benefits of the exchange of people and information, and joint research and training initiatives, in relation to hydrogen development activities. The agreement could lead to an important mutual bridge between North American and European markets” [3a]



The European Union, Japan and the United States have made both strategic and financial commitments to the concept of the Hydrogen Economy with President Bush committing \$1 billion dollars in federal incentives to the furtherance of this technology. Twenty percent of the most recent proposed 2007 U.S. Department of Energy Budget – \$195.8 million – is being directed at hydrogen technologies [4].

What is even more interesting is how those developing nations – particularly those with both exploding development and population – India and China are looking at hydrogen technologies. In a recent meeting in London, England – the Indian Minister of Non-conventional Energy Resources declared:



“We have been slow to respond to face the challenge of our energy requirements, but we are fast catching up and if powerful nations like America, China, Japan, Canada and

Germany have a roadmap for Hydrogen energy, so have we. By the year 2020, we will have one million vehicles on our roads running with Hydrogen fuel," he told a BBC Hindi programme.

"We have huge resources of renewable energy in the country. To begin with we have a potential of five trillion Mega Watts (MW) of solar energy, seventy thousand MW of wind energy and more than 2,000,000 MW of Hydrogen energy. We are now tapping this potential to meet our requirements." [5]

China is moving in a similar direction. In a recent report – China indicated that not only will it be using hydrogen powered buses to transport visitors to the 2008 Olympics – but will shortly thereafter begin commercial production of hydrogen powered buses.

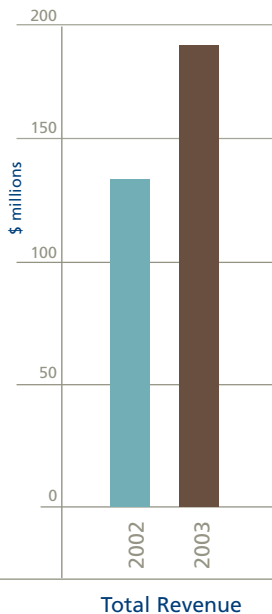
"Probably the greatest stunner at the May 25-28 (2004) meeting was an announcement that a year after the Olympics, in 2009, China plans to start series production of fuel cell buses." Shen Xiang, director of the Beijing Science & Technology Community, in a detailed presentation on the "Clean Energy Concept for the Olympic Games 2008," outlined the "batch production" of transit, touring and mid-sized buses for the Olympics, both battery driven and fuel cell versions, the creation of a special trial and demonstration bus line in Beijing prior to the games, construction of infrastructure systems, and a host of other facilities. Many of these facilities will be clustered in a "Hydrogen Transportation Park," a little less than 10 miles from the Olympics Park, to be operated by the New Energy Vehicle Engineering Center of Tsinghua University, an institution regarded as the MIT of China. In addition to hydrogen refueling facilities, the park will feature solar and wind power generators, garages for hydrogen vehicles, a steam reformer for natural gas and an impressively modern looking Hydrogen Education Center" . . . [6]

The Case of Canada – and the Other Non-Atlantic Provinces

Canada is no slouch when it comes to the development, testing, and commercialization of these technologies. Many Canadians are already familiar with Ballard and their mixed record of success. Until now they have been in the "capital burn" phase of new product development.

"Now, it needs to push harder to produce and promote the technology that has been championed as a leading challenge to environmentally unfriendly gas-guzzling cars and smoke-belching power plants.

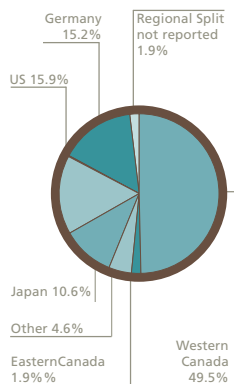
So far, fuel cells and other new power sources have failed to crack fossil fuels' stranglehold on the marketplace, disappointing investors and environmentalists alike. "Ballard, like a lot of technology companies, has had a reputation in the past of under-delivering, relative to expectations – we're changing that," John Sheridan (new CEO) said. "At times in the past we also tried to push technology without enough focus on the customer – we're changing that."



To make fuel cells a commercial reality the company will need “tenacious execution and being obsessed with delivery, doing what we say we’re going to do,” the former Bell Canada president added.

AMONG BALLARD’S TARGETS FOR 2006:

- Revenues of between \$55 and \$65 million.
- Operating cash consumption between \$50 million and \$65 million.
- Ship or book 280 Mark 1030 fuel cells.
- Deliver prototype of next-generation fuel cells for field demonstration.
- Ship or book 300 Mark9 SSL fuel cells.
- Achieve a 195-second starting time at -30 C for its auto fuel cell.
- Deliver a next-generation automotive fuel cell prototype. [7]



Ballard, however, is only the most visible proponent of what is now an almost \$200 million dollar industry that is growing at a rate of more than 20% per year. Industry Canada completed a survey to which 98 Canadian firms replied in 2004. The profile of the Hydrogen industry now across Canada reveals:

+ 40% Revenue has grown 40 percent from \$134 million in 2002 to \$188 million in 2003.

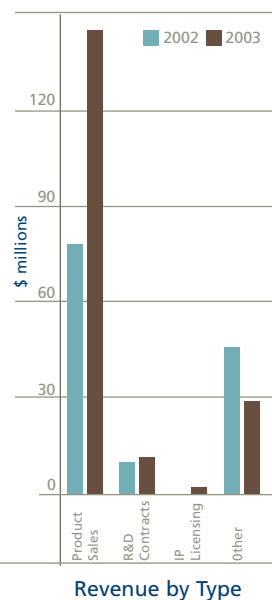
+ 5% R&D expenditures have increased 5 percent from \$276 million in 2002 to \$290 million in 2003.

± 0% Employment stands at 2,685, a modest decrease from 2002 levels.

+ 232% Participation in demonstration projects has increased by 232 percent to 262 in 2003 from 79 in 2002.

+ 34% Patent holdings are up by 34 percent to 581 in 2003. [8][9]

Revenue by Region



Globally, Canada is seen very much as a player in this space. However, there do not appear to be any government or private entities now involved from Atlantic Canada in any of these developments.

On the following page, I have included a table of those companies and organizations invited to participate in this survey of Canadian companies with an active interest, services, or products supporting hydrogen related products and services.

THE RISK OF NOT RISKING

Advanced Measurement Systems Inc.	ESTCO Battery Management Inc.	Heliocentris Energy Systems Inc., North America	PEM Technologies Inc.
Agile Systems Inc.	Fuel Cell Technologies Ltd.	HERA Hydrogen Storage Systems Inc.	PowerDisc Development Corporation Ltd.
Air Liquide Canada	Fuel Cells & Reformers Canada, Ltd.	HSBC Bank Canada	PowerNova Technologies Corporation
Alberta Research Council	Fuel Cells Canada	Hydrogen Research Institute	Praxair, Inc.
Analytic Systems	Fueling Technologies Inc.	Hydrogen Technologies Corp.	PrecisionH2 Inc.
Angstrom Power Inc.	FuelMaker Corporation	Hydrogenics Corporation	PricewaterhouseCoopers LLP
Armstrong Monitoring Corporation	General Hydrogen Corporation	IMW Industries Ltd.	Province of Ontario
Astris Energi Inc.	Global Hydrofuel Technologies	Inco Special Products	QuestAir Technologies Inc.
Azure Dynamics Corp.	Global Thermoelectric Inc.	Industry Canada, Energy and Marine Branch	Royal Military College
Ballard Power Systems Inc.	Gowling Lafleur Henderson	INRS (Institut National de la Recherche Scientifique)	Sacré-Davey Engineering
BC Hydro	Greater Vancouver Regional District	James Hoggan and Associates Inc.	SatCon Power Systems Canada Ltd.
Bell Canada	Greenlight Power Technologies Inc.	Keen Engineering	Simon Fraser University
BET Services Inc.	GrowthWorks Ltd.	Kinectrics Inc.	SMC Pneumatics (Canada) Ltd.
BOC Gases	H2 Concepts Alternative Fuels Consulting	KPMG LLP	Staubli Corporation
Business Development Bank of Canada	Heffelfinger & Associates	Kraus Global Inc.	Stuart Energy Systems Corporation
Canadian Hydrogen Association	Heliocentris Energy Systems Inc., North America	Laval University	TD Securities Inc.
Cellex Power Products Inc.	HERA Hydrogen Storage Systems Inc.	MagPower Systems Inc.	Tekion Solutions Inc.
Centre for Automotive Materials & Manufacturing	Fuel Cells Canada	Marsh Canada Limited	Teleflex Canada
Centre for Manufacturing of Advanced Ceramics and Nanomaterials	Fueling Technologies Inc.	McCarthy Tétrault LLP	Tyco Electronics Canada Ltd.
Chevron Texaco Technology Ventures	FuelMaker Corporation	McGill University	Universal Dynamics Limited
Chrysalix Energy Limited Partnership	General Hydrogen Corporation	Membrane Reactor Technologies Ltd.	University College of the Fraser Valley
Cimtex Industries Ltd.	Global Hydrofuel Technologies	Methanex Corporation	University of Alberta
Clean Energy Canada	Global Thermoelectric Inc.	MH2 CANADA INC.	University of British Columbia
Dana Canada Corporation	Gowling Lafleur Henderson	National Bank Financial	University of Calgary, Western Canada Fuel Cell Initiative
Deere & Co.	Greater Vancouver Regional District	National Research Council Canada	University of Victoria, Institute for Integrated Energy Systems
Deloitte & Touche LLP	Greenlight Power Technologies Inc.	Natural Resources Canada	University of Windsor
Delta-Q Technologies Corp.	GrowthWorks Ltd.	Neodym Technologies	Ventures West Management Inc.
Dupont Canada Inc.	H2 Concepts Alternative Fuels Consulting	Neutron Technologies Inc.	Westport Innovations Inc.
Dynetek Industries Ltd.	Heffelfinger & Associates	NORAM Engineering and Constructors Ltd.	Xantrex Technology Inc.
Enbridge Gas		Ontario Power Generation	Yaletown Venture Partners
Energy Ventures Organization		Palcan Fuel Cell Co. Ltd.	Zetacon Corporation
Energy Visions Inc.		Pathway Design & Manufacturing Inc.	
Energy3 and EnergyQBD		PEM Engineers Inc.	

The Maritime Opportunity

There is, however, one emerging player in all of Atlantic Canada that I am aware of who has recognized and is seizing the opportunity to develop some expertise and, hopefully some products and services tied to the concept of the Hydrogen Economy. That player is the Government of Prince Edward Island – led specifically by Premier Binns who has secured a major contribution from Industry Canada as part of a \$16 million dollar project to create a Wind-Hydrogen Village.

The Project is a joint Venture between Hydrogenics and the PEI Energy Corporation with a broad range of partners including:

Industry Canada
 Natural Resources Canada
 Maritime Electric
 Frontier Power Systems

Atlantic Orient Corporation
 University of UPEI
 Holland College
 University of New Brunswick

Saint Mary's University
 Vestas Canada
 Dynatek Corporation
 Saskatchewan Research Council

The concept underlying this project is simple, elegant, and powerful. The Wind-Hydrogen Village will be a demonstration project taking wind-power from PEI's current wind-farm in North Cape, converting it to hydrogen fuel, and then using this fuel to power farm machinery, homes and businesses, buses, and even a fishing and tourist boat.

Hydrogen technologies now already involve a wide range of applications from large power sources for buildings and industry, vehicles from motor scooters to hybrid buses to submarines, and to micro power sources for cell phones and laptop computers.

The PEI-Wind-Hydrogen project is unique because of its relevance to smaller and rural and coastal communities. Many of the hydrogen developments around the world are aimed at large and developed marketplaces. The entrepreneurial opportunity for Atlantic Canadians may lie in developing knowledge, expertise, and systems for smaller communities and especially for those in developing countries.

The risk for Atlantic Canadians in not becoming aware and not getting involved at this point is that we will be missing this incoming and long lasting wave of business opportunities. ○-

Profile

Dr. Harvey Silverstein is Executive Director of the EMBA Program at the Sobey School of Business. His specialty is in the impacts and implications of technology and its effect on people and organizations. He has been an entrepreneur – starting four companies, a corporate executive as former partner of both KPMG and Ernst & Young, and a professor of Science, Technology, and International Affairs.

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Shackleton's ship the Fram, January 1, 1908

Lessons in Leadership from *The Last Place on Earth*¹

BY PETER CHIARAMONTE AND ANTHONY R. YUE

The Myth of the Explorer

JUDGING BY THE RECENT EXPLOSION OF BOOKS, FILMS, AND DOCUMENTARIES ON THE SUBJECT,² THE STUDY OF POLAR EXPLORERS OF A CENTURY AGO IS ONCE AGAIN IN LEADERSHIP VOGUE. AS ONE CRITIC HAS SUGGESTED, THIS REVIVAL MAY BE “BECAUSE OF A PERCEIVED PAUCITY OF CONTEMPORARY LEADERS” IN OUR OWN TIME.³

Great leaders are emulated when they suit us and overlooked when they don't. Fifty to 100 years ago, characterized by World War and national sacrifice, Englishman Robert Falcon Scott seemed to fit the bill. More recently, fellow countryman and Antarctic explorer Ernest Shackleton's achievements, putting the highest premium on loyalty and survival, resonate more powerfully than ever before. But, somewhat surprisingly, the explorer who actually *won the race* to the South Pole in 1911, Norwegian Roald Amundsen, has yet to capture similar prominence in the literature on team leadership and project management. What of his team's achievements, putting the highest premium on speed, innovation, and adaptation. What of these lessons?

Reading the biographies and history of great leaders and explorers is a time-honored way of gaining knowledge and inspiration for our own models of behaviour as team leaders. The lives, histories, achievements, and defeats of Polar explorers Roald Amundsen, Ernest Shackleton, and Robert Falcon Scott are of particular interest to members of contemporary team-based environments, especially where risk-taking and pioneering are prerequisites for a successful outcome.

The Virtues of Examining Defeat

This story, of the first journeys to the ends of the Earth, offers powerful metaphors from which today's leaders can, by reflection, discover the full range of challenges all must face who odyssey into uncharted territories.

We are comforted to think we learn from the exemplars of television celebrities, real estate moguls,

and entrepreneurs extraordinaire. We'd like to believe that we benefit from reading their bromides for success – and sometimes, maybe, we will. But anyone who has seriously undertaken a study of leadership has recognized that what works for one group in one place at one time is difficult, if not impossible, to duplicate in another group at another time and place.

The truth is that we learn more from our own successes than we do from the success of others. It is generally more difficult to respond to another person's conquests with the same sensitivity we extend to their defeats. This is not to say that others' success isn't energizing, just not as much as one's own triumphs. However, we do learn from both our own mistakes *and* the mistakes of others.

When people talk to us of their failures, we often relate to them better than we do when they tell us about their successes. We learn from the mistakes of others largely because it is easier to identify with suffering than it is with success. Seeing others fail encourages us to try and not suffer the same fate when faced with similar circumstances ourselves. Learning from the mistakes of others is generally less painful, less temporarily debilitating than making the same mistakes on our own. There's value in examining defeat and an opportunity in understanding how others have overcome it. We are reminded that, after being knocked down, that it's the getting up again that counts most.

- 1 Based on the title of the book by Roland Huntford and the screenplay by Trevor Griffiths.
- 2 IMAX, NOVA, PBS, A&E, Discovery Channel, and so forth.
- 3 Scott Colbourne, "The Real Survivors," *Globe Television*, 2003.

Rivals for the Pole

From the 16th century, since Martin Frobisher sought a waterway across the top of North America, discovery of the North West Passage defied the efforts of a succession of Arctic explorers. Englishman Sir John Franklin's men actually located the Passage in 1845, only to die before they could reach it. But it was a 33-year-old Roald Amundsen from Norway who, through careful planning and the example of the Canadian Inuit, finally claimed the long sought-after prize in 1905. At the same time Amundsen was engaged in his Arctic apprenticeship among the Inuit, British naval Captain Robert Falcon Scott, together with Dr. Edward Wilson and Ernest Shackleton, was making history at the other end of the Earth (Antarctica) by reaching furthest south (450 miles from the Pole) in 1902.

Ernest Shackleton was considered by many in his own time as a grand failure, having attempted to reach the South Pole three times and each time having had to turn back defeated. After attaining the "Furthest South" British expedition under the command of his bitter rival, Robert Falcon Scott, Shackleton commanded his own second campaign to Antarctica in 1908-09 and came within 100 miles of the Pole before a shortage of food and fuel forced his three man party to retreat.

Surely the most harrowing tale was of that of Shackleton's third expedition (which New England Patriots' head coach Bill Belichick recounted to motivate his football team to an unexpected Super Bowl victory in 2003)³. On this third journey, in 1914, Shackleton set out with the ambitious goal of crossing the Antarctic continent on foot, from the Weddell Sea across the Pole to McMurdo Sound, 2000 miles through the worst weather and terrain imaginable.

Shackleton and a crew of 27 set sail for Antarctica on board the *Endurance*. Ice crushed the ship and the men had to abandon her, dragging three lifeboats on a five-month journey across the ice floes in terrifying cold to a remote Elephant Island. Here 22 of his crew members remained marooned for two years.

With severely limited provisions, Shackleton and a crew of five sailed a rickety canvas-covered lifeboat 800 miles through the roughest seas in the world to the uninhabited coast of South Georgia Island. With no rations left, Shackleton and two of his men climbed the uncharted glaciers to a whaling station on the other side of the mountain. After four attempts and four months later, Shackleton returned to Elephant Island to rescue the rest of his men. Not a single life was lost despite the impossible conditions.

Antarctica Expedition, January, 1914



Back in Norway, Amundsen began to secretly recruit a team for his next expedition, to be first to the North Pole; his dream since childhood. Amundsen's original plan was to repeat countryman Fridtjof Nansen's northern drift on *Fram* in 1893-96. Nansen used his knowledge of the east-west currents from Siberia to drift westwards towards the North Pole. The *Fram* (meaning "Forwards") unlike Shackleton's *Endurance*, was well equipped to resist the crushing vice of sea ice in high latitudes. Its round-bottom oak and spruce hull was designed to absorb the pressure of the drift ice, and lift itself out of danger in a squeeze.

Scott was also in Norway preparing equipment for his well-publicized return to Antarctica. Putting his absolute faith in new technology, Scott was testing his motor traction gasoline engines at the ski resort in Lillehammer. It was here that Scott first learned that his countryman and personal rival, Ernest Shackleton, had landed at McMurdo Sound in Antarctica, and was planning his own preemptive assault on the South Pole.

Meanwhile, Rumors of Glory

In the meantime, while Amundsen was hard at work on his preparations in Christiania (later renamed Oslo), his brother and business manager, Leon, relayed the news that American Frederick Cook had claimed to reach the geographic North Pole in 1908. Another American explorer, Robert Peary, disputed Cook's contention. Peary claimed to have been first to plant the Stars and Stripes of the United States at the North Pole in 1909 (actually, there remain strong doubts that *either* explorer accomplished the feat). Regardless, after hearing of Cook's claim, Amundsen decided to postpone his secret plans for the North Pole.

In Antarctica, in 1907, Ernest Shackleton came to within 97 miles of the South Pole, lifting the veil that still rested over the interior of Antarctica. "One end of the Earth had been claimed," said Amundsen, "But at the other a little corner still remained." [1] What did the Norwegian explorer have in mind?

Fearing that his benefactors would withdraw their support for another Arctic journey, now that the North Pole had apparently fallen, Amundsen secretly decided to solve the problem of the South Pole, *before* venturing north again. Amundsen knew instinctively that it could be done. Besides, he reasoned, in order to get finance, you need a *coup*. Although Amundsen remained publicly committed to further exploration of the North Polar Basin, he privately revealed to his brother Leon a secret plan to take the South Pole along the way.

Scott, relieved by Shackleton's misfortune, soon after formally announced his plan to retrace Shackleton's march up the Beardmore Glacier, completing the last 97 miles to the South Pole. Unbeknownst to Scott, Amundsen had already decided to blaze a completely new trail through the unexplored terrain 400 miles to the east of the British Antarctic Base in McMurdo Sound, in the Bay of Whales, off Roosevelt Island.

The Secret Disclosed

There were sound reasons for Amundsen's secret detour. He was still heavily in debt from his trip through the North West Passage and knew if he were to have any chance to repay his debtors, a spectacular triumph would be needed. Amundsen believed that the Norwegian government, had they an inkling of his plans to go South instead of North, would have immediately withdrawn their support, thereby sacrificing his entire Northern campaign to the national interest (the Norwegian government was bent on cultivating British goodwill toward their recent independence from Sweden). And so, on June 6th 1910, on board *Fram*, Amundsen gave the order to pull anchor and set sail. However, he had yet to tell his crew the truth about their itinerary and destination. He waited until the ship was "beyond recall" before making his announcement.

Anchored in Funchal Roads, near the Island of Madeira (off the coast of Casablanca), Amundsen finally told his crew the journey's true aim. "It is my intention," he told the men, "to sail southwards, land

a party on the Southern continent, and try to reach the South Pole.”[2] At first there was a hush, broken only by the sound of the creaking *Fram* pulling on her anchor chain. Most of the men stood stunned. Oscar Wisting, who was with Amundsen on the North West Passage as well, later wrote of the occasion: “[Amundsen] used ‘we’ and ‘ours’ ... it was not his expedition but ours; we were all companions and all had the same common goal.”[3] In the end, the entire crew agreed to go. Writing in the third person, Amundsen entered these notes in his journals: “With men like these I don’t think Amundsen will deserve any credit for reaching the Pole. He ought to be thrashed if he doesn’t.”[4]

recruited for his professional expertise in a particular aspect of vital importance to the expedition. For example, among the Polar Party, Helmer Hanssen was a master ice pilot and dog-driver; Olav Bjaaland was a champion cross-country skier and master carpenter; Oscar Wisting had practical training in dentistry and surgery, was a superb sail and tent maker, and an experienced explorer; and Sverre Hassel was an expert at navigation, saddlery, and sledge-driving with dogs and ski. The advantages were obvious. Their combined experience allowed one man’s expertise to take over where another’s fell off. However, far from naive, Amundsen further noted, “There is no rose without a thorn.” The drawback to having so many

On the saloon wall of the *Fram*, Amundsen had these words posted: “We are all captains; we are all crew.”[5] It’s not so much how many followers a leader has, he said, as how many leaders one has created among the team.

A LESSON IN CROSS-FUNCTIONAL TEAM BUILDING

The first “formal” lesson in leadership for the twenty-first century: *The more leadership capacity in the ranks, the more effective the team.*

On the saloon wall of the *Fram*, Amundsen had these words posted: “We are all captains; we are all crew.”[5] It’s not so much how many followers a leader has, he said, as how many leaders one has created among the team. It takes the concentrated energy and ideas of many people working in concert to change anything of importance. Without distributed leadership at all levels in the workplace, akin to a band without rhythm, either things never get started properly in the first place, or else initiatives fade quickly for lack of momentum or direction.

Each member of the Norwegian team was the kind of all-around Viking Amundsen admired. Each man was

experts on board is that each might give the impression that others’ opinions are of lesser value, which can lead to conflicts.

Herein lays a revealing contrast in the way Amundsen and Scott recruited their men. For the Norwegians each area of expertise was coordinated so that a number of men could perform the same tasks one individual alone might avoid or ignore. For his Antarctic expedition, Scott relied upon many of the naval seamen who had accompanied him on his previous *Discovery* expedition to Antarctica plus a sizable group of newly recruited officers and scientific staff. All together, the British had seven officers, 11 biologists, geologists, physicists, and zoologists, and 14 men below decks. To this he added only one experienced dog handler, Cecil Meares.

The Norwegians established a team environment in which everyone had both vital primary roles as well as

secondary supportive roles to play. In this way, Amundsen thought the alignment of experts would permit the group to function as a team, instead of having individual members occasionally working at cross-purposes. Cross-functional teams reduce the time it takes to get things done, often exceeding performance requirements at the same time. For example, working in the underground workshops at *Framheim* (the Norwegian winter quarters in Antarctica), the carpenters were able to plane down the weight of the sledges from 150 to 48 pounds without sacrificing strength or durability.

The British, by comparison, were simply thrown together at random, more reflective of matters of inside connections than a serious attempt to recruit the right men for the right jobs. Moreover, Scott would wait for volunteers to come to him for examination and approval, whereas Amundsen actively sought out those most talented and experienced for creating a team-based workplace.

Although there was still hierarchy in the Norwegian team, it operated informally so the men generally felt free of it. More traditional team designs tend to group people together by breaking the work down into its functional specialties. Although Amundsen's recruits each had very specialized skills, they could readily combine their broad interests and abilities and apply them to many cross-disciplines. Such involvement across boundaries enhances commitment by taking people beyond their normal expectations for responsibility. The British Navy (under Scott) on the other hand, classified men according to their rank making it easy for someone to say, "That's not my job," leaving the task undone. This naval bureaucracy tended to create a mindset of dependency, where people did what they were ordered to do, but no more.

Univeritas Antarctica

In 1911 a journey to the South Pole meant arriving a year earlier in order to establish supply depots of

food, fuel, and equipment to be used later to secure a safe return. The Norwegians had established three such depots, taking three tons of supplies as far south as 82 degrees (less than 500 miles from the Pole). Furthermore, on their final assault, the Norwegians continued to lay depots at precisely every degree of latitude, so as to shed extra weight on the journey home.

Regardless of his vast experience as an explorer and lessons learned from past mistakes Amundsen wrote in his diary *Into the Antarctic Night*, "We may just as well confess it; we had forgotten to bring out a tool which is a commonplace necessity on a Polar expedition; namely, a snow shovel." [6] The Norwegians brought ice saws and drills with them, but no snow shovels to excavate a snowdrift that had covered their winter quarters at *Framheim*. Once some shovels were forged out of some iron plate Olav Bjaaland found on board the ship, the men began to clear the snow away from the hut yet Amundsen stopped them. Work with nature, he said, instead of against her and so the Norwegians left the snowdrift running along the axis of their quarters intact.

Instead of moving the snow away, the men dug downwards into the hard blue ice of the Barrier itself and were able to excavate an underground village of workshops in which they stored their supplies and worked on their equipment. It was 60 degrees below zero outside the hut, a balmy plus three or four degrees inside the workshops.

During this time, Amundsen asserted that unemployment was an unknown evil in their "little republic" at *Framheim*. He saw to it that his crew always had important work to do. There were no dead periods and so the time passed quickly. During this preparation time, constant adjustments were made to clothing, tents, ski bindings, sleeping bags, and cooking equipment.

Things were no so rosy in the British camp at Cape Evans. The British hut was divided by a partition of packing cases, one side for the officers and gentle-

men, the other side for the ratings and groom boys. The British shore party consisted of geologists, meteorologists, physicians, and a photographer but only one expert skier, and the one expert dog driver. Instead of learning to ski or drive dogs, the British comfortably spent their time listening to lectures about rocks and weather, playing soccer, and attending birthday parties. A navigation course was also conspicuously absent from the curriculum; they already had a navigation specialist in Lt. Teddy Evans, Scott's popular first officer.

A LESSON IN CREATING A VISION OF POSSIBILITY

In a wonderful scene in Trevor Griffith's screenplay of *The Last Place on Earth*, Amundsen has Adolph Lindstrom, his cook and closest confidant, prepare a special "treat" for their mid-Winter celebration in June, 1911. Lindstrom comes up with a white-glazed cake in the form of the Ross Ice Barrier, TransAntarctic Glaciers, and the Plateau leading to the Pole. Amundsen uses this occasion to create a vision of what is possible for them to achieve; "Just as long as we do this winter's work properly and just-in-time so that we can leave at the earliest possible date in ... September."

"That soon, d'you think?" comes the challenge from the men.

"I do," responds Amundsen, "The *Fram* can only return for a week or two before the ice freezes her in. There is no use taking the Pole if we can't get out with the news. So," he says, taking up a tiny paper Norwegian flag stuck on a toothpick and planting it firmly into the cake precisely at the spot designated the South Pole, "We must be here by Christmas," he adds. Amundsen has created a vision of what is possible *and* defined this in terms of the commitment it will take to achieve it. Without a vision, there is no commitment. Without commitment, nothing happens.

Challenging a commitment to excellence is part and parcel of the envisioning process. In this same speech

Amundsen is quick to add the "counter-story" to his leadership rhetoric. "The British are already here," he said, "and they have maybe one, or two, motor tractors on *terra firma*. Just in case anyone was discounting them from our reckoning." Amundsen mentions the obstacles and doesn't hide the risks. "Besides," he adds, "there's no use in taking the Pole if we can't get the word out." [7]

A LESSON IN THE RARE ADVANTAGES OF MAKING REALLY BIG MISTAKES

On Friday, September 8th, 1911, the Norwegians left *Framheim* heading south in pursuit of the Pole. Then the cold weather counter-attacked. By Monday, less than 40 miles out on the Barrier, the thermometer sank to minus 60 degrees (F). The winds were gusting to 100 mph and the men had to build Inuit-style igloos to wait out the storm. The next day the liquid in the compasses froze solid. Amundsen put the decision to his men and, using *consensus* to reach all decisions on key matters, was persuaded to retreat. At the point of exhaustion, and after 12 continuous hours of merciless struggle against the cold and wind, all the men arrived back safely to their *Framheim* retreat. Five of the dogs had died and most of the men were blistered and frostbitten. At breakfast the next morning, most of the men agreed that the whole idea of starting so early for the Pole had been a mistake, but they withdrew at open rebellion.

Amundsen later wrote that this was perhaps the worst crisis of his entire career as an explorer: having his authority openly challenged at such a crucial moment. Just the same, although the false start had set them back by three weeks, the Norwegian team actually profited by the delay.

The retreat had exposed certain weaknesses in their equipment and these were subsequently corrected during their second layover at *Framheim*. These improvements later proved to be a significant contributing factor in the overall success of the expedition. For example, the ski boots, which early on proved to be too stiff in the extreme cold, went through four generations of mutations until they

were supple and spacious enough to prevent frost-bite. In all, the Norwegian's confidence in themselves, their dogs, and their equipment only increased as a result of this chilling early fiasco.

A LESSON IN MULTI-TASKING OUT ON THE ICE BARRIER

By November 7th 1911, Amundsen's party had reached 82 degrees, 21 minutes [450 miles from the Pole] and was camped under thick masses of overcast cloud. When they came out of their tents the next morning, they could see, for the first time, the snow-clad Trans-Antarctic Mountains, whose 15,000 foot summits stood between them and their goal.

Amundsen had established a method whereby, in case of lost or broken thermometers, each man would compete to guess the correct temperature every morning upon leaving the tent to relieve himself. This, of course, serves several purposes. Fresh air served to brighten everyone's day. Plus, knowing who the "best guesser" was when it came to the temperature might be useful in measuring altitude, among other things, should there be no other means left. Substantial prizes of cigars and a telescope for the season's champion were awarded. And as each man returned to the tent, Amundsen had the pungent hot chocolate ready to greet them with; the Ice Tent Café.

As the Norwegians continued their march toward the mountains, two glaciers came into view, one closer than the other, each blocking their advance. Putting the decision to a vote, the men elected to find a way up the near glacier (the one they named the Axel Heiberg Glacier) which turned out to be a steep, rugged mountainside laced with treacherous chasms and two sets of dangerous ice blocks. Once the Norwegians reached the ridge, they repentantly acknowledged how, unlike the route they had chosen, the far glacier, called Folgefonni, ran down safely and evenly to Ice Barrier below. That would be the route home. But for now, Amundsen's mistake wasn't resented by his comrades since, as with every decision of importance, the matter was jointly discussed, and each man had been party to the decision.

As they proceeded to lay their outward depots along the Polar Plateau, the Norwegians marked each depot with 10 black pennants on either side, at half-mile intervals. In addition to the depots, snow beacons were built every three miles along the route so that, in calm weather, one cairn would be visible from another. All told, the Norwegians built 150 six-foot snow beacons constructed of 9,000 blocks of snow. In each was a record of the position with directions to the next marker; a guard against heavy weather conditions. This was, reasoned Amundsen, no place to take chances.

By contrast, the only marker the British left at the crucial One Ton Depot (79 degrees, 40 minutes) was a single red flag, and the route was itself not marked at all. And yet, on the outward depot journey, February 17, 1911, while setting up One Ton Depot, cavalry expert Captain Lawrence Oates urged Scott to take the four strongest remaining Siberian ponies and proceed the remaining 14 miles to 80 degrees, before caching their supplies. Scott refused and turned home for Cape Evans in McMurdo Sound 14 miles short of their intended target. This would prove ominous.

The Race Won

On December 15th, 1911, Helmar Hanssen, who was as usual leading with his non-magnetic sledge and compass, called back for Amundsen to go up into the lead with an estimated eight miles to go to the Pole. Hanssen had no wish to be first to at the Pole. That honor belonged to the leader of the expedition. "I can hear the axle creaking," remarked an excited Olav Bjaaland, and at three o'clock p.m. the men cried, "Halt!" and they all shook hands. Roald Amundsen took out the Norwegian flag, and each man took part in the act of planting the flag. It was not, he said, the privilege of one man, it was the privilege of all those who risked their lives.... "So we plant you, dear Flag, on the South Pole, and give the plain on which it lies the name King Haakon VII's Plateau." [8]

Privately, Amundsen later wrote "Nothing except a battle lost can be half so melancholy as a battle

won...Can anything more perverse be conceived? I believe no human being has stood so diametrically opposed to the goal of his wishes as I did on that occasion. The North Pole had attracted me since the days of my childhood, and so I find myself at exactly the opposite end of the world.”[9] Unfinished business.

A LESSON IN THE RHETORIC OF TUMBLING HORIZONS

The Norwegians had arrived at the South Pole healthy and in good spirits. They had extra fuel and plenty of food for men and dogs left over. They could not know the comparatively dire circumstances faced by the British in this regard. Scott and his men were over 300 miles and more than a month behind the Norwegians

When asked what they should do with the surplus food and fuel, Amundsen decided to take it with them, reasoning that they might still need it. Amundsen also employs a bit more leadership rhetoric at this point to remind his men that they haven’t won until they’ve gotten back first with their good news.

should make the mistake of letting them reach the telegraph first, the issue of priority might become quite confused. And.... we still have business at the other end of the earth, remember? We are a long way from home, shall we go? [10]

On March 7, 1912, Amundsen and his crew reached Tasmania and announced to the world that they had reached the South Pole and returned safely from the journey. In actual fact, the Norwegians were fitter and stronger than they had been when they first stepped on to the Southern continent.

A LESSON IN SPEED, TEMPO, AND FLEXIBILITY

The Norwegians had already proven to themselves how disastrous both impulse and inaction can be. But they were in a race after all, and surely they had to move fast? Even though they could easily have skied twice as far depending on varying wind and surface conditions, through instituting a steady tempo of 15 miles a day, the Norwegians were able to travel

The rhetoric of leadership requires that leaders continually point the way ahead to the next horizon. And as each new horizon appears, the goal itself continues to tumble away. The challenge of leadership, therefore, remains in perpetual motion...

The rhetoric of leadership requires that leaders continually point the way ahead to the next horizon. And as each new horizon appears, the goal itself continues to tumble away. The challenge of leadership, therefore, remains in perpetual motion; confidence matched with acceptance in a never-ending fluidity of change. For example, in Trevor Griffith’s screenplay, the dialogue at the Pole is as follows:

AMUNDSEN: For those who think we have already won, let me say this. The British will be here, perhaps soon. They don’t give up easily. And, if we

exactly one measurable degree of latitude (60 nautical miles) on a map every four or five days. Amundsen felt the altitude still called for restraint and, this way, each man knew exactly what was expected of him and could be confident in his ability to achieve it. Specific. Measurable. Attainable.

With the wind at their backs and longing to get back down to an altitude where each breath didn’t “feel like fire,” the Norwegians quickened their pace once they had descended the Plateau. With lighter loads they often exceeded 30 miles a day on the Ice Barrier

and arrived at *Framheim* two weeks earlier than expected, after a total journey of 1860 miles in just 99 days.

The British still had other problems to contend with. Since astronomical navigation was vital in traveling over the featureless interior of the Polar Plateau, not to mention finding the goal of the expedition itself, Scott decided at the last moment to add a fifth man. Lt. Henry Bowers, a navigator, was added to the final Polar party. This was on account of the fact that Scott had already dismissed his navigator and first officer, Lt. Teddy Evans, largely because of Evans' popularity with the men. Having himself long forgotten the navigation he'd studied behind a desk in the Naval Academy at Dartmouth, Scott was forced to add Lt. Bowers to the team. The British Polar party therefore consisted of five men, even though their provisions had been packed in four man units. Not only were their supplies disappearing, so was the morale of the men.

The Race Lost

Thirty-four days after the Norwegians cantered up to the Pole with their dogs, the British team discovered the Norwegian flags and dog tracks. By this time (January 17, 1912) Scott and his companions were suffering from both physical and mental distress. Titus Oates' feet had turned gangrenous from frostbite and the men were almost certainly in the throes of scurvy-driven madness and fatigue.

The British had barely enough fuel to cook their food. They were dehydrated from want of enough fuel to melt snow for drinking water and they were starving because of the extra fifth man. To do their distances, they had to drag their sledges up to 12 hours a day at an altitude of over 9,000 feet, a strain on even healthy men and women. Starving and ill-clothed to combat the elements, Scott's men suffered the cold immensely. For example, on the Ice Barrier, temperatures were between -30 and -40 degrees (F). Not only were their defenses against the cold severely diminished, they were starving because their depots were too small, too few, and too far apart. Scott has

spaced them for animal transport, knowing full well that they would be man-hauling sleds on the return from the Pole.

Petty Officer Edgar Evans, who Scott chose for his size and physical strength (overlooking his suspect mental stability) went insane and died of scurvy on the Beardmore Glacier. Down on the Ice Barrier, still more than 300 miles from base, the British found a dreadful shortage of fuel due to the phenomenon of "creeping" (the rapid evaporation of kerosene in extreme cold). Although Scott had observed "creeping" on the earlier voyage of the *Discovery*, he neglected to find a proper solution to the problem. The British team paid dearly for his incompetence.

The Ultimate Defeat

By March 1912, Scott had completely collapsed as leader and Dr. Edward Wilson has taken over command. Titus Oates was now unable to pull with the others. One of the effects of scurvy is to make old wounds reopen, because Vitamin C is necessary to keep the scar tissue together. This degeneration of the tissues also causes great pain. The bullet that had smashed Oates' thighbone 10 years before in the Boar War had left a massive scar, which began to dissolve under the developing effects of this vitamin deficiency. On March 17, 1912, his 32nd birthday, Captain Lawrence "Titus" Oates dragged himself out into the whirling blizzard, never to be seen again.

On March 21st, the three men remaining, Scott, Wilson, and Bowers, came to within 11 miles of One Ton Depot. With their supplies almost completely gone and their camp buried in a fierce blizzard, they lay in their tent for nine days until the last of their food and fuel gave out on March 30, 1912. They had carried 30 pounds of scientific rock samples with them from their explorations. The same amount of seal meat might have saved them.

At times it may appear too devastating a critique of Scott and contemporary British naval practices of the period to trace this tragic failure to pride and

mismanagement causes alone. Scott may have been deficient in many of the qualities we might wish for in an ideal leader, but we might also benefit from recognizing the predilection toward such tendencies we may have in ourselves. If nothing else, Scott teaches us the need for greater acceptance of our own misapprehension as leaders.

Norway's Flag at the South Pole. The news was splashed across the headlines of every newspaper in the world. The world's newest nation had bested one of its most established nations. The British immediately denounced Amundsen as an "interloper", this despite hints of Scott's mismanagement and failure at leadership, which came back with the survivors. American explorer Robert Peary went so far as to say that Amundsen had "deliberately stolen the prize from Scott."

It riled Amundsen that British schoolchildren were already being taught that it was Robert Falcon Scott who discovered the South Pole. Ernest Shackleton was almost alone in England to give Amundsen accordant recognition for his feat. The more general opinion among the English was that Amundsen's victory over Scott was entirely due to the element of surprise he achieved by keeping his plans secret for so long. At a dinner given by the Royal Geographical Society in 1912, Lord Curzon, the president, made a speech that ended with, "I propose three cheers for the dogs!". Amundsen took offense at this slur on his honor and resigned his fellowship; the Society declined to accept.

A LESSON IN LEADING FROM BEHIND

Amundsen was despised for his victory and Scott was celebrated for his defeat. Few attempts were made to analyze the reasons for Scott's disaster, or Amundsen's success, for that matter. Scott the martyr eclipsed Amundsen the victor.

There is a myth that it's lonely at the top. This myth implies that there is a single coherent function to be performed by the "boss." This myth must give way to the fact that leaders never truly act alone in any workplace but as part of a system that must exist in

the hearts and imaginations of all parties to that relationship. This is what was most missing from Scott's leadership. He never understood, as Amundsen did, that the more leadership there is in the ranks, the more effective the team. Scott liked to march at the head of the party, whereas Amundsen preferred to remain at the back of pack. There he could observe the working of men and dogs, picking up anything vital that might have fallen off the sledges.

Roald Amundsen, who at 33 was the first to sail across the North West Passage and first to reach the South Pole at 39, closed down the era of dog teams and sledges, and opened the way to terrestrial exploration by flying machines. Amundsen returned several times to the North Arctic Basin. At age 53, he reached 87 degrees 44 minutes, the furthest North by aircraft. On May 14, 1926, in the airship *Norge*, Amundsen, together with American Lincoln Ellsworth and Italian Umberto Nobile, passed over the North Pole, after deliberately allowing American Commander Richard Byrd to be the first man to fly to the North Pole. Or so it was believed at the time.

According to newly uncovered records from the flight discovered in the late 1980s, an oil leak in one of his engines forced Byrd to turn back 150 miles short of his target. Thus, the record once again goes to Roald Amundsen, who floated over the North Pole three days after Byrd's failed attempt. Roald Amundsen – first man to both Poles.

Can such leadership be taught? Surely some aspects, but likely not all of it. Leadership is not contained solely in the actions of the individual leader, but rather in the dynamic system. Leadership is not, as Scott assumed, equivalent to holding high office. Leadership is meant to influence or direct opinion, not dictate it. And leadership cannot be reduced to majority rule either; that leaves out the will of too many people whom must be involved in decisions that affect them. People want to share responsibility in their workplace, not simply act in accordance with someone else's imperatives.

Given the exemplars of the great Polar Explorers of a century ago, we should be reminded of how the full range of our own potential as team leaders is not something we should leave to chance. It is rather something we must pursue thoroughly and systematically, the way Amundsen approached his victory at the South Pole, equipped with both a historical perspective and an avid appreciation for the risks involved. History is rife with tales of the disasters of denial for the sake of control. On the other hand, Amundsen's team-based working environments were focused on the commitments each of the men had made with one another, for the sake of the whole enterprise.

The Last Viking

At the end of May 1928, Amundsen was called out of retirement to rescue Italian pilot and inventor Umberto Nobile and his crew, who had crashed on to the Polar Basin in the airship *Italia*. Someone else eventually rescued Nobile, but Amundsen, who had set out to reach the Italians by aircraft, vanished into the North Polar Sea. Thus ended the life of the greatest explorer of the 20th century, and one of its finest leaders.

In the North of Norway, on the Arctic coast, a legend arose of two men who were paid and fed by their neighbors to wait on a cliff, looking off in the direction in which Roald Amundsen had last been sighted, watching and waiting for his return. ○—

Profiles

Peter Chiamonte, Ph.D., is a professor in the Faculty of Management at Dalhousie University. Professor Chiamonte believes that *The Last Place on Earth* is a treasure trove of classic leadership lessons in that, each time you return to the story, you discover something that had, until then, remained darkly hidden.

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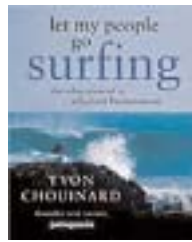
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reviewing what's HOT what's NOT

BY BRAD LONG

It is hard not to share Yvon Chouinard's pessimism about the fate of the natural world. I read his book, *Let My People Go Surfing: The Education of a Reluctant Businessman*, while riding the train from Halifax to Belleville. The scenery outside was punctuated by abandoned vehicles and the rusting remnants of various production processes. The scenes played out inside the train included such moments as the outburst of disbelief expressed by a nearby teen over the failing of his dollar store batteries to power some new electronic gadget. In *Let My People Go Surfing*, Chouinard offers his cure for the inevitable depression that accompanies such pessimism. The cure is action, and this book is as much a blueprint for action as it is an autobiographical account of the history behind Patagonia (the clothing designer, manufacturer and retailer) that Chouinard founded and continues to own.



REVIEW OF YVON CHOUINARD'S: LET MY PEOPLE GO SURFING: THE EDUCATION OF A RELUCTANT BUSINESSMAN

The Penguin Press, 2005, 272 pages, HC

Available at Chapters/Indigo \$25.49

Chouinard offers a series of philosophies that have been used and refined over time in the management of Patagonia, and these serve as his recipe for profitable, responsible and sustainable business. To understand these philosophies, one must understand the values of the individuals who shaped Patagonia from its inception. In his youth, Chouinard and friends lived close – very close – to nature, and were usually found suspended from any number of rock faces in the American southwest or camped out in their shadows. From these experiences, Chouinard found perfection in simplification and developed a deep respect for nature that acted as his antidote to a pervasive consumer culture. Furthermore, Chouinard began to make mountain climbing equipment that was stronger, lighter, more versatile and simpler than anything on the market. Chouinard Equipment was born out of necessity, a means to twofold ends of better quality gear for personal use and a source of income to allow for more exotic climbing excursions. With a beach-front shop and a staff of mostly extreme sporting enthusiasts making climbing equipment by hand, Chouinard found himself at the helm

of the largest, albeit only marginally profitable, hardware supplier in the US by 1970. Clothing eventually was added to their catalog, rationalized as an extension of climbing gear whereby cotton and thread joined steel and rivets in the production line. Chouinard then led the evolution of Patagonia from a clothing label to a separate business entity, and subsequently sold Chouinard Equipment to its employees.

Ruminating on risk while reading *Let my people go surfing* provided me with a useful lens through which the lessons of this book could be better understood; risk being all the more apropos, considering Chouinard's notion of adventure (meaning, by definition, that you might not return alive)! In Chouinard's world, risk management decisions are therefore ever-present. The primary strategy employed by Chouinard to control risk is to purposefully limit the growth of Patagonia, understanding that exponential growth cannot exist for long in a world of finite resources. Every company, says Chouinard, has its ideal size. By choosing to live within their means, Patagonia has a reduced likelihood of experiencing the pains associated with too rapid

growth, including crises in cash flow, compromises in quality that stem from outsourcing critical functions, and over-capacity associated with cyclical drops in demand. Instead, Patagonia grows at a 'natural rate' (defined by their core customers to be in the range of 5% annually), shuns mass market advertising, and produces only a narrow range of products deemed most necessary. These self imposed limitations allow for faster, better and simpler manufacturing and for resources to be shifted to where they are needed the most. From a risk management perspective, responsible growth leads to more stable product and production planning and fewer resources are required as inputs. The fact that Patagonia is a privately owned company, which Chouinard has no particular intention to sell, further complements this risk management strategy. In Chouinard's opinion, being public would restrict what Patagonia could do with its profits and would place pressures on the management team to embark upon a 'growth/suicide track'.

Controlled growth is related to the second means by which risk at Patagonia is reduced. Patagonia is, as Chouinard frequently asserts, a product driven company. Since most of the original employees were climbers and surfers, the original products were made by the same people that used them, often in life or death situations. A commitment to quality was, therefore, built into the

culture of Patagonia from its inception. Surely if all company executives were similarly reliant upon the consumption of their own products and services, the risks associated with inferior quality and its resultant effect on customer loyalty would be drastically reduced. To be a product driven company also requires a commitment to innovation. While at the helm of Chouinard Equipment, Chouinard halted production of pitons (their best selling climbing tool) because they caused irreversible damage to the rock walls into which they were hammered, and replaced them with a 'cleaner' device that could be reused. Likewise, at Patagonia, innovations in the fabrics used to manufacture clothing include polyesters made from recycled pop bottles, cottons grown organically, and dyes that are non-toxic. At Patagonia, quality and innovation have developed into a philosophy that extends beyond product design and manufacturing to include all business practices, ranging from superior on-site child care to minimized waste in production. In *Let my people go surfing*, Chouinard demonstrates that the mountain climbing analogy is appropriate for businesses. Mountain summits may be reached in a number of ways; it is the process of climbing that is more important than reaching the top. Likewise, in business, it is through adherence to guiding principles without making compromises that one becomes distinguished from one's competitors.

Chouinard's recurring theme is the idea that Patagonia is an experiment to determine whether being responsible to the environment is also good for business. His excursions around the world have convinced him that the root of many social ills is the deterioration of the natural world by humans, the only species to 'foul our own nest'. As a result, the environment is viewed as being Patagonia's primary constituent, for without a healthy environment, there would be no customers, employees, shareholders, and hence no business. Central to the philosophies guiding Patagonia, therefore, is the desire to implement solutions to this environmental crisis, and Patagonia employees are challenged to lead examined lives by constantly looking inward for solutions to Patagonia's own role as a corporate polluter. One important technique used to reduce environmental risk is the adoption of 'seven generation planning', whereby all decisions are made under the assumption that Patagonia will be in business for the next 100 years and will have to live with the long term consequences of the choices they make. Furthermore, employees are participants in discussions about the meaning and applicability of the corporate philosophies to various aspects of the business. Chouinard has taken the concept of the corporate retreat to new heights, literally, and as a result, Patagonia employees are better communicators and share a common direction. Risk is reduced when employees are trained to

consider the long term consequences of their actions and are empowered to make the decisions consistent with company values. To the extent that an environmentally responsible approach to decision making has led to profitability, this suggests that Chouinard's experiment has been a success – stewardship and sustainability are fundamental business interests. Profits are not a goal and their achievement is not stated in

minor and major roles. A call to action for all citizens to make similar sacrifices for the sake of our own survival concludes this book.

Chouinard offers an inspiring and positive message for business persons concerned about the perceived contradiction between the health of their own business enterprise and the health of society and the environment upon which it depends.

At 272 pages with numerous, sometimes mesmerizing black and white photographs, *Let my people go surfing* is a blueprint for action that demands of its reader a moment of reflection about how to take ownership for reversing the current fate of the natural world. ○—

“Profits are not a goal and their achievement is not stated in the mission statement of Patagonia. Instead, profits are considered to be the welcome by-product of doing everything else right...”

the mission statement of Patagonia. Instead, profits are considered to be the welcome by-product of doing everything else right, and therefore management decisions have become more conservative, more thoughtful and less risky. More profoundly, Patagonia's profitability is achieved after payment of a self-imposed 'earth tax', whereby 1% of total sales revenues are donated to various grassroots conservation efforts. *Let my people go surfing* contains numerous testimonials to the activism that has resulted in significant environmental achievements, from river restoration to land protection, in which Patagonia has played both

As Chouinard attests, the two are inseparable. The contradiction, however, is perpetuated by the current management discourse centered on finding solutions to the 'problem' of achieving a balance between the professional and personal lives of workers, as if the two should be compartmentalized as such. In doing so, it becomes possible to rationalize the action taken in one domain as being isolated from the other. The Patagonia model, however, illustrates that when work is more tightly integrated with the personal lives of those employed, it can produce more enjoyable, meaningful and profitable work while simultaneously leading to more socially responsible behaviour.

Profile:

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Females Still Face Barriers: A Commentary on the Training Gap in Canada.

BY GORDON BRIAN COOKE & ISIK URLA ZEYTINGLU

It is well established that training benefits workers, employers, and society. For employers, a well-trained workforce increases the likelihood of having an efficient and adaptive organization [1]. For society, a well-trained labour force can provide a competitive advantage in today's global market [2], [3]. From a worker perspective, access to training improves current and future career prospects [4], [5]. Conversely, an underinvestment in training has potentially significant opportunity costs.

However, the workers who cannot access sufficient training seem to bear the brunt of any negative effects. Compounding the seriousness of this situation is that certain sub-groups of workers appear to be denied training relative to others. Given this situation, we suggest that access to employer-sponsored training has important social implications.

When studying this issue, we considered three types of employer-sponsored training: on-the-job training, classroom training on the employer's premises, and "outside" (i.e. offsite) training that is supported by the employer. In most cases, employees accept any available training opportunities. However, a small number decline training that is offered by their employer. To account for this possibility, we define access to employer-sponsored training to mean that a worker has been *offered* at least one of the three types of training. The proportion actually *receiving* training is slightly lower. Of course, there are other sources of training as well. Governments often provide various training programs, while individual workers can upgrade their skills on their own as well. Nonetheless, many employers *do* provide training, and it is important to understand who accesses it.

It is also useful to consider certain labour market trends. In recent years, a wide range of new work arrangements have become prevalent in Canada. More than one tenth of Canadian workers are in temporary jobs, while about one in six work only a part-time schedule [6]. One particularly worrisome issue is that workers in these non-standard (i.e. temporary and/or part-time) jobs tend to have poorer pay, benefits, and job security relative to those in standard (i.e. permanent, full-time) jobs [7, 8]. The lower job security means that a segment of the labour force is essentially "trapped" in one (inferior) non-standard job after another [9, 10]. This is not an overstatement. For instance, our earlier research indicated that non-standard workers not accessing employer-sponsored training are less likely to receive future promotion from that employer as well. It is important to note that a significant majority of workers in non-standard jobs are female [11]. Moreover, workers in

non-standard jobs are less likely to be unionized [12]. This lack of union protection further exacerbates the vulnerability of non-standard workers. The effect of these trends is increasingly polarized working conditions in Canada [13], with females over-represented among those with relatively poor working conditions [11, 14].

Using Statistics Canada's 1999 and 2000 Workplace and Employee Survey (WES) datasets, we analyzed the potential impact of employment contract (i.e. job status, gender, unionization, and workplace tenure on access to employer-sponsored training. To isolate the relative impacts of these four factors, we utilized multiple (logistic) regression analysis among several worker sub-samples of interest. This is a well-accepted approach for a study of this type. First, though, we generated rudimentary descriptive statistics.

Based on simple proportions, female workers have essentially the same access (at 59% vs. 58%) to employer-sponsored training as males. On the other hand, non-union workers have lower access (at 57% vs. 64%) than unionized workers. Similarly, non-standard workers have lower access to training (at 51% vs. 60%) than standard workers. Surprisingly, low-tenure workers have slightly higher access to training (at 60% vs. 58%) than those with more seniority in the workplace. *At first blush*, then, there is no sign of a training gap on the basis of gender or tenure. Also, non-union and non-standard workers seem to have lower access to training, but not remarkably so.

It is risky and inappropriate, however, to rely on (these) simple proportions because of the potentially confounding influence of other relevant variables. To address this problem, we controlled for the influence of various employee and employer variables possibly affecting training access. With this approach, a truer picture of the effect of employment contract status, gender, unionization, or tenure emerges. Among all workers but controlling for other influences, access to employer-sponsored training is significantly *lower* for those with non-standard employment status, and by a factor of 20% or more. Meanwhile, it appears

that unionization has little effect, while being female or having low tenure is associated with somewhat higher training access. However, the results were dramatically different when considering training access among only non-union low-tenure workers. These workers deserve extra attention because they are *particularly* exposed to the discretion of management. There is no union to protect these workers and they have had little time to acquire power and influence in the workplace. Among this worker sub-group, it initially appeared that neither gender nor employment contract status affected training access.

Since these results were counterintuitive, we repeated the analysis for non-union low-tenure workers while also separating females and males into different groups. The rationale is that inequality in the workplace is probably rather subtle nowadays. It seems

some employers still *view* – and consciously or subconsciously *treat* – male and female workers differently. Male workers, whether or not in non-standard contracts, have relatively equal access to employer-sponsored training. That is, males in non-standard jobs seem to be treated the same as their “standard” counterparts. Conversely, some employers apparently perceive that females in non-standard contracts either do not need, or should not get, training. Unfortunately, this can be a self-fulfilling prophesy. If employers do not provide training to these female workers, then few will be able to advance their careers. However, if few of them are advancing in their careers, then employers might provide training resources to other, more upwardly mobile, workers. The net result is that females are further over-represented in “dead-end” jobs. This is an example of the statistical discrimination phenomenon [15, 16].

That is, males in non-standard jobs seem to be treated the same as their “standard” counterparts. Conversely, some employers apparently perceive that females in non-standard contracts either do not need, or should not get, training.

more likely that less obvious forms of discrimination have replaced the direct (or overt) discrimination that was common in the past. When focusing only on this narrower subset of vulnerable workers, the results are more much definitive. In the male grouping, the effect of employment-contract status was not significant. That is, being temporary or part-time does not create a training barrier among non-union low-tenure *males*. In the female grouping, however, those in temporary contracts, whether full-time or part-time, are only *one third* as likely as permanent full-time workers to have access to employer-sponsored training. Among non-union low-tenure *females*, then, those in temporary jobs appear to face a significant barrier to training. Our inference is that

Many would argue that the provision of training is – and should be – left to the discretion of management based on the environment in which they operate and the business strategies that they adopt. We wholeheartedly agree. However, that same management discretion could result in lower access to training for low-tenure and/or non-standard workers *overall*. In such a scenario, the appropriate public policy response might be to provide targeted training to those disadvantaged groups. The results we found are quite disappointing and suggest that a “gap” exists along gender lines. Initially, we found that non-standard workers have lower access to employer-sponsored training. Upon closer inspection, though, this training gap only occurs among non-union low-tenure workers,

and primarily among females in temporary jobs. Whether this training gap occurs intentionally or unintentionally is unclear. However, it *is clear* that management determines who has access to employer-sponsored training in most cases, and certainly with respect to non-union low-tenure workers.

We suggest that it is worthwhile for employers to re-evaluate how they allocate their training resources. Training provides a host of benefits for all. Perhaps training resources could be more equitably distributed within *your* workplace. Your intervention can potentially eliminate barriers facing vulnerable workers and generate organizational benefits at the same time. In particular, we encourage employers to ensure that females do not face extra training barriers. Providing more equitable training access to your employees, including those new to your organization and/or in non-standard jobs, provides at least one definite benefit. You will have a larger pool of qualified workers available to move into more senior, standard jobs within your workplace. Our analysis shows that too many vulnerable females in non-standard jobs, who lack tenure in the workplace *and* the protection of a union, are facing a "training gap". We hope that this commentary provides food for thought, and the impetus to review training access, for decision-makers within Canadian workplaces. —

Profiles

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Cascading the Value Proposition through the Organization to the Individual¹

BY SUNNY MARCHE

For the last ten years I have been counseling my consulting clients in mid- to senior management to document their value proposition and contribution to the organization throughout the year. One of my colleagues refers to this as his trophy case.

There is no shortage of discussion in both the academic literature and trade publications around the notion of the “value proposition”. The logic is unassailable: the value proposition is the difference between what people pay (i.e., the value) for goods and services and what those goods and services cost to provide. Necessarily this means that there must be a customer who understands the particular value proposition, and is prepared to pay for it. In addition to this, the customer must perceive the overall value proposition to be higher than the competitor’s, and higher than if they could provide the good / service internally. Generally speaking, the more rare the value proposition and the more in demand it is, the greater the revenue and profit it will generate.

Much of the literature on the value proposition is directed at the organization as a whole [1] [2] or in the context of enabling technologies and strategies [3] [4] [5]. Having said this, it has been a continuing surprise to me in my consulting practice how few individuals in organizations have clearly thought through the questions of their fundamental value proposition and its relationship to their core competencies. There is a great deal written on the notion of “core competency” especially in the context of business strategy and the prospects for outsourcing. I expected there would be significant literature in which the concepts of organizational “core competence” and the related notion of “value proposition” are both present. The Internet is a relatively rich source of over 3,560 web sites where these two phrases play a role. This is less the case in the academic literature and trade publications where it is not very common in the context of the relationship between the enterprise as a whole, its organizational sub-components, its managers and its employees. An organization with a weak connection between its core competency and its value proposition is likely to be missing important opportunities, or worse, risking serious competition. One that does not connect these concepts to its human resources is in the same situation.

Although both concepts are fundamental to the strategy of the overall business, there is another consideration of these ideas that warrants broader discussion: the downward cascade of these ideas in an organization. It is clear that each and every unit in an organization should have both its own core competency and its own related value proposition. This is true of finance and accounting [6], information systems, human resources [7], manufacturing, or marketing [8]. It also seems likely that when the core

¹ The author gratefully acknowledges the editorial suggestions and encouragement of a valued colleague: – Dr. Jack Duffy

competency of the organizational sub-unit is tightly coupled to the core competency of the organization as a whole, the likelihood of outsourcing that specific organizational unit is lower than it might be if the sub-unit core competency were more generic. To the best of my knowledge, there is no formal research on this topic. For example, one can imagine a human resources department in a pharmaceutical company with specialized skills in sourcing, recruiting, compensating, training, promoting and retaining people from this particular professional community. Thus the value proposition cascade continues down the organization chart within human resources, to each specialty area, e.g., compensation, benefits administration, labor relations, the pension administration, etc. As it turns out, some human resources authors note that the need for a value proposition works in the other direction too: from employer to employee [9] [10], where employees consider how valuable the employer is to them in their career.

The same value proposition logic applies to the smallest unit of the organization – the individual. It is as important that the individual be clear about her value proposition to the organization as it is for the organization to be clear about its value to its customers. In other words, everyone one of us has both a core competency and a value proposition in the context of the organization in which we work. Common to both the organization unit/sub-unit and the individual is the issue of value visibility. It is not enough to have both a well-developed, rare, in-demand core competency that produces a profitable value proposition that is important to whoever is paying for it. The customers who benefit must understand all of this too. Wise organizational units articulate their value propositions clearly and communicate them to the customers, often as part of their brand, e.g., Ford’s “Quality is job one” or “Built Ford tough!” and Walmart’s “Always low prices!” Wise individuals clearly articulate **their** value propositions to **their** customers, beginning with their immediate supervisors.

To that end, for the last ten years I have been counseling my consulting clients in mid- to senior management to document their value proposition and contribution to the organization throughout the year. One of my colleagues refers to this as his trophy case. At least once every two weeks and preferably more often, a manager should sit down and document in what specific ways she has made a contribution since the last time she submitted to this discipline. There are at least seven good reasons for investing this effort.

1.

MEMORY ENHANCER Many of the contributions people in organizations make are informal and serendipitous.

For example, a colleague might drop by for advice on how to counsel a difficult employee, and manager provides insight about both the colleague and the employee that resolves a major logjam. It might have been a fifteen-minute conversation with significant benefit to the organization, but if it does not get written down, it will not likely be remembered by any of the participants except in a generalized, non-specific way. The Chinese proverb says it best: “the faintest ink lasts longer than the best memory.”

2.

SELF-AWARENESS Each person in the organization really wants to have a clear idea of what contributions she is making, if for no other reason than as part of being a reflective practitioner, to use Schön’s expression [11].

If at the end of the week, she is unable to identify a single instance of her value to the organization, she will want to be the first to find out. It is a vital signal for her to do something different, perhaps beginning with some diagnostic work. There are many possible explanations for this state of affairs: inappropriate skill set and/or education, not enough specific experience, lack of motivation, inadequate organizational support, too much pressure, too little pressure, wrong job, wrong organization, etc. On the other hand if at the end of the week she has a healthy list of accomplishments,

this can improve self-confidence and morale. Note that for the most part, it is the outcome that counts not the activities. She will want to make sure that she makes a connection between her contributions and accomplishments to either intermediate deliverables required in the organization or major deliverables such as sales targets met. It might also be worth thinking about these accomplishments in the context of balanced score-card thinking too [6]. Some examples in this area might be “deliver sales”, “improve employee morale”, or “contribute to a stable and effective workforce by employee counseling”.

3.

DATA FOR PERSONAL AND PROFESSIONAL DEVELOPMENT As an employee collects data over time, she will have some specific input for planning personal and professional development. Every job has direct and indirect opportunities for making a difference. Typically the direct opportunities are specified in the job description, or are implied by the job title. The indirect opportunities are often more subtle and more significant, especially in more senior positions. By reflecting on the difference between how she actually contributes compared to how she might have contributed, a person can develop a sense of where to focus self-improvement efforts, whether formal or informal.

4.

THE ANNUAL REVIEW Notwithstanding the ambiguous evidence about its efficacy, the annual performance review is still a feature characteristic of organizational life [12] [13]. While struggling with the continuous full court press of her job, a supervisor may ask the employee to develop the first draft of this important document. It is not necessarily a bad idea, and in some appraisal systems, it is a requirement [14]. Self-evaluation is often relatively unassuming and self-effacing. As difficult as it might be for the employee, the self-assessment is not the place for modesty, and those specific examples of value contributions documented over the year will help to make the important point – the individual has a value proposition of ongoing utility. If the employee is preparing her own assessment, it is very useful to have a trophy file of specific behavioral examples to draw on when it is time to present problem solving skills, commitment to the organization, ability to work under pressure, and sense of team play. In other words, this is a way for the individual to demonstrate that she is an asset to the organization, and smart organizations take care of their assets. Part of the job of every employee is to help the organization understand her value proposition.

5.

THE ANNUAL REVISION TO THE RÉSUMÉS One of the other career disciplines more honoured in the breach than in the observance is the revision of the résumés. Wise people have an up-to-date résumé for a number of reasons. Sometimes a career opportunity emerges on short notice in the company, even before a formal position is developed, advertised, and recruited. This is especially the case in project oriented work environments. Or at head-hunter might call on a short timetable. Being ready in either event speaks volumes about an individual’s degree of preparation and the capacity to anticipate. Note that the ongoing trophy file should make it easier to develop more than one résumé.

6.

PROMOTING YOUR CAREER AND EMPLOYMENT STABILITY The marketplace of smart people shares one important characteristic with other marketplaces — product differentiation is critical. For individuals who are fortunate enough to work in an organization that is healthy and growing, their differentiation is the foundation of their individual value proposition. The more clearly a person has articulated that proposition, the easier and more natural it will be for her to communicate it as she identifies opportunities [15]. Those who work for an organization that faces “rationalization”, “right-sizing”, or “de-selection” will want their supervisors (and the extended organization too) to have a clear understanding of their worth, when the management committee meets to decide the size and shape of the team that survives.



YOUR LAWYER Finally, should the dark specter of organizational politics and managerial downsizing reach out its bony finger to unfairly tap an individual on the shoulder, the detailed list of accomplishments in support of her personal value proposition is going to look awfully good in the wrongful dismissal suit.

The employer-employee relationship has changed substantially over the years. It is unlikely that employees at any level can expect ever to return to the traditional practice of beginning with a company, working up through the ranks, and finally retiring from a lifetime of loyal service. It is equally unlikely that most professional workers will fully join the “free agent nation.” Yet whatever the employment situation, whether wage slave with the golden perks-and-pension handcuffs or independent consultant with the freedom of nothing left to lose, the explicit or implicit pressure for each person to demonstrate a value proposition will continue unabated. There are only two questions left: 1) whether to be disciplined in choosing to use to collect the data to answer the question: “what have you done for us lately?” and, 2) whether we make sure the people who work for us do likewise. ○—

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Using Online Competitive Intelligence to Help Identify Organizational Risk

BY CONOR VIBERT



EACH YEAR, AS CONSISTENTLY AS NEW YEAR'S RESOLUTIONS ARE MADE AND BROKEN, MAJOR MEDIA OUTLETS POST OR LIST THEIR RENDITIONS OF THE MOST IMPORTANT NEWS STORIES, SPORT STORIES, DISASTERS, NEW INVENTIONS, BUSINESS SUCCESS STORIES, SCANDALS AND OTHER RELATED TOPICS OF INTEREST. SOME ACADEMIC JOURNALS HAVE FOLLOWED A SIMILAR PATTERN AND OFFER TO READERS THEIR OWN LIST OF RELEVANT IDEAS. THE HARVARD BUSINESS REVIEW (HBR) IS NO EXCEPTION.

Once a year it announces its list of break through ideas for the year to come. In February of 2005 its annual list suggested ideas such as a leadership role for continuity champions, the rise to prominence of the Velcro organization, the online onset of blog trolling and a growing use of corporate funds to support the training of employees to improve the use of a bewildering array of internet and communication technology available to them. Another idea noted in HBR's list was the concept of corporate risk management (CRM).

Corporate risk management was once primarily the domain of insurers and actuaries. Recent events such as 9/11, SARS, the Gulf war, Hurricane Katrina, Russia's political use of gas pipeline shipments to address concerns with its neighbours, the Enron and Worldcom corporate scandals, and dramatic changes in weather have brought home to most corporate players the importance of forecasting and managing risk. Online competitive intelligence can play a useful role in helping managers to address the concerns arising from risks such as those noted above.

"Competitive Intelligence (CI) is the process of monitoring the competitive environment, an environment that includes general business trends and competitor activities. Systematic and ethical, this process of

monitoring may also be conceived of as the flow of activities involved in a business decision from the point where data is collected to the point where a decision is made and specific desired results achieved. An important goal of any CI process is to develop *actionable intelligence* [1]. A desired scenario is one where data is collected and compiled to develop information that is then analysed to create knowledge. Knowledge, when communicated, becomes intelligence and when applied by decision makers leads to action and results” [2].

The creation of corporate wide or enterprise risk management systems has been the response to these concerns. Enterprise Risk Management (ERM) Systems are enterprise wide initiatives that enable managers to grasp the significance of, and coordinate responses to financial, hazard, operational, and strategic risk [3]. Tools and procedures are well known and well established to deal with risks related to operations, hazards, and financial concerns. What are not well established in many firms are system wide initiatives to coordinate these efforts such as those found in ERM systems. Further, new to the formula are efforts to manage and identify strategic risks. Strategic risks originate with factors such as a company’s sources of revenue and profit, the look and feel of industry, its competitive position, and others concerns such as its brand strengths [3]. They are similar to what Miller [4] refers to as industry and firm specific uncertainties. Industry specific uncertainties affect all firms in an industry and in the language of investors, cannot be simply diversified away. Firm specific uncertainties focus on challenges that only affect the firm. These can be diversified away by investors. Examples of industry specific uncertainties include market supply shifts, changes in consumer tastes, demand changes by other buyers, new entrants, and scarcity of complimentary goods. On the other hand, firm specific uncertainties refer to problems with collectibles, self interested behaviour on the part of managers, labour unrest, product quality, and emission levels [5].

Understanding the process underlying a CRM system provides a means to grasp the role that online competitive intelligence might play in aiding managers. A typical CRM process [5] would incorporate the following steps:



Online CI can help managers identify, assess and map the risks. Maps can be somewhat different for each firm or situation. Examples of the categories that might be found in a strategic risk map are offered by Slywotzky & Drzik [3]. These include industry, technology, brand, competitor, customer, project and stagnation.

CI professionals and researchers have come to recognize the important role that an ever changing Internet may play in their efforts to understand the risks associated with commercial activity. So where might an analyst find useful information about companies, and the risks associated with specific markets and industries? The answer is that important information can be found online in many locations using numerous tools. These tools include but are not limited to search engines, aggregators, online newspapers and magazines, blogs, commercial Web sites, discussion boards, government and regulatory sites, and career search sites. The objective of the remainder of this article is to offer but a few examples of how to identify these risks using internet-based resources.

We'll assume that our competitive environment of interest is North America. Although differences do exist between organizations operating in Canada as opposed to the United States, many of the risks are that same. Let's also assume that much of the information pertinent to publicly traded companies is also relevant to larger private companies. But where should one begin?

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Let's start where the pros would start – corporate financial documents filed with the Securities and Exchange Commission (SEC) (see: www.sec.gov). It is the regulator concerned with corporate financial reporting in the U.S. It maintains a database, termed EDGAR, which hosts electronic versions of the financial statements of all companies whose shares trade on U.S. stock markets. Filing of these documents is mandatory for these corporations. In a nutshell, EDGAR represents the “motherlode” of original source financial data for analysts and investors interested in tracking the financial performance of large, primarily American, publicly traded companies. It is of interest to Canadian corporations for a number of reasons. First, much of the commercial landscape of Canada is controlled by U.S. based corporations that adhere to these rules and regulations. Second, Canadian firms seeking to access capital for growth more often than not seek to access capital in the U.S. In order to do so, they will voluntarily meet SEC disclosure standards in regards to financial reporting. Third, increasingly the shares of many Canadian companies are jointly listed on Canadian and U.S. stock exchanges.

There are many different files or forms that must be filed by these corporations with the SEC. The choice of form to file is based on circumstance or time of the year. Three documents are considered to be the “bread and butter” of professional market watchers. These are the 10-K, the S-1, and the DEF 14A. The 10-K is the company's annual report and is filed once a year. The S-1 is the company's registration document. It is also the company's pre IPO (Initial Public Offering) business plan. A company will only

file this document once in its lifetime. The DEF 14A is the document that lists the issues to be voted on at the annual shareholder meeting. It is important because it offers the profiles, compensation details, and shareholdings for each of the company's key executives and directors. The S-1 is useful as it offers a detailed overview of the market facing the company as well as rich insight into its overall strategy, its competitors, its supply chain and the risks it faces. The annual report normally offers great insight regarding the risks facing the corporation, important lawsuits that it is dealing with, and the locations of its facilities and specifics of its geographic markets. Indeed, risk factors facing the filing company are

Both investors and the general public are offered free access to corporate financial documents through the web site of the SEC. The information found in these documents forms the basis of corporation information offered to the public on sites such as Biz.Yahoo (see: <http://biz.yahoo.com>) and Reuters (see: www.reuters.com).

often clearly spelled out in its 10-K and S-1 form. This is useful for a couple of reasons. First, access to the 10-K filings of a number of companies operating in the same industries offers an analyst the opportunity to assess which risk factors might be specific to each firm and which might be common to the industry. Access to a recent S-1 form of a firm in an industry offers insight as to the challenges facing new entrants to an industry, as well as an extremely well detailed business plan that often paints a clear picture of new, established or alternative suppliers, customers and distributors. The S-1, the 10-K and the Def 14A documents provide another little bit of extremely useful information. They offer brief biographical sketches of members of the senior management team. Do the executives have the smarts to successfully guide the corporation as intended? More often than not, the best way to assess this capability is the existence of a track record of success.

Both investors and the general public are offered free access to corporate financial documents through the web site of the SEC. The information found in these documents forms the basis of corporation information offered to the public on sites such as Biz.Yahoo (see: <http://biz.yahoo.com>) and Reuters (see: www.reuters.com). The Reuters web site is useful for another reason. It offers overviews of industries. Each overview clearly spells out three or four key trends and three or four key issues affecting all competitors. Among the content provided is a sorting of industry specific news stories by categories such as alliances, mergers & acquisitions, new product launches, and corporate re-organizations. What is happening with the competition? Is consolidation occurring in a specific value chain segment? This online information source, helps answer that question.

Picture this scenario. In order to understand your market and in anticipation of a new product launch, you have asked a consulting firm to provide population data on specific geographic regions. Your concern is trying to assess the size of the market for your consumer products. You are unclear as to where such information might exist and the process that the consulting firm might use to access this data. Fortunately, a recent BBA graduate gained instruction in her courses as to how to access such data.

You are surprised to learn how easy the information is to access using the Statistics Canada and U.S. Census Bureau web sites. What has also been brought to your attention is that summary demographic statistics regarding towns, cities, and states can also be easily access through Yahoo.com (see: <http://realestate.yahoo.com>).

Perhaps another concern of yours is the identity of potential suppliers and distributors of your products, as well as their credibility. Do they have solid track records in business? Finance.yahoo.com offers one means of identifying potential suppliers, customers and distributors. Its Industry Centre tab offers links to hundreds of industries and profiles on the public and private corporations active in these areas. ThomasNet (see: www.thomasnet.com) allows users to search by product type. Are you interested who makes, distributes, and services a particular product, say office furniture for example? Are you interested in where these corporations are located and their links to firms in other segments of the value chain? This is the site to check.

Once you have identified these companies, how might you assess the credibility of each as a partner?

Understanding how online information can be used, the practice of online competitive intelligence is in itself a skill worthy of attention.

One means is to check their track record with the relevant regulators. If the company is in the business of selling consumer products, then its record in regards to product recalls is available by searching the database hosted by the U.S. Consumer Product Safety Commission (see: www.cpsc.gov). If it makes or sells products regulated by the U.S. Food and Drug Administration (see: www.fda.gov) its track record can be accessed using the search function found on that web site. Has the company come under suspicion for its financial reporting or is the history of key executives somewhat murky? If there are concerns, and the problems occurred with a publicly traded corporation, then a search of SEC web site (see: www.sec.gov) should highlight any issues. What is the potential partner organization's track record in regards to the environment? The ECCHO database hosted by the U.S. Environmental Protection Agency (see: www.epa.gov) offers analysts and researchers the opportunity to assess the impact of corporate, private and public facilities on air and water quality, as well as being informed of hazardous waste disposal activities. Users can search by facility name or by location. This same database also offers access at the click of a mouse to EPA case reports on specific facilities.

How about changes in consumer preferences? One means is to track news stories about specific products or companies. News aggregators are an excellent means of accomplishing this. They offer only recent news stories from thousands of media sources. Key word searches using the aggregators of Google (see: <http://news.google.com>) or Yahoo (see: <http://news.yahoo.com>) can often pull up the latest insight regarding a consumer trend. Another angle for pursuing information of this nature is use a consumer feedback site such as Planet Feedback (see: www.planetfeedback.com). This site offers a searchable

collection of consumer letters of complaint and compliment regarding companies, which it makes available online to the public.

Finally, who might become competitors? Two ways that an observer might peer into the future is to look at the companies that are being funded by venture capital companies and examine patent activity in areas of interest. In regards to the former process, identifying venture capital (VC) firms that fund activities in certain industries can be tricky. Online sources of venture capital, sorted by industry, can be identified by accessing a report commissioned by PricewaterhouseCoopers. It is available through www.pwcmoneytree.com/moneytree/nav.jsp?page=vcind. Many of these VC firm web sites in turn identify the companies that they fund. It is through access to these sites that potential new competitors may be identified. In terms of patents, the U.S. Patent and Trademark Office web site (see: www.uspto.gov) allows users to search issued patents and applications by product classification, inventor, location, assignee (patent owner), and other categories. An interesting feature of each patent summary is the listings of patents referenced by the inventor and patents that in turn reference the patent under examination. These identify the firms whose ideas were built on and those who are building on the ideas found in the patent.

In conclusion, identifying and understanding strategic risks are an important challenge facing corporations, both public and private. Clearly, not all risks can be identified ahead of time. The growth of meaningful content accessible through the Internet suggests, however, that fewer risks may go unnoticed and those that are noticed will be more clearly understood. Online information sources such as news aggregators, and the web sites of government regulators and commercial organizations including Reuters, can aid managers in this regard. Understanding how online information can be used, the practice of online competitive intelligence is in itself a skill worthy of attention.



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Profile

Conor Vibert, Ph.D., is an Associate Professor of Business Strategy at the Fred C. Manning School of Business of Acadia University. He obtained a Ph.D. in Organizational Analysis from the University of Alberta in 1996. He is the author of *Web Based Analysis for Competitive Intelligence, Theorizing on Macro-organizational Behavior: A Handbook of Ideas and Explanations, Competitive Intelligence: A Framework for Web-based Analysis & Decision-Making*. Conor has published in *Competitive Intelligence Review, Education and Information Technologies, the Journal of Competitive Strategy* and the *Canadian Journal of Administrative Studies*.

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