Meta-Leadership: A Primer

A Working Paper

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Meta-Leadership: A Framework for Leadership Connectivity

Abstract

Large organizations have not only become less hierarchical in recent years but have also increasingly formed a wide variety of arrangements that link them to other entities. Leading in such an environment requires extending one’s influence and accomplishment beyond one’s formal bounds of authority to create productive connectivity. Meta-leadership is a theoretically robust and pragmatically valid framework for generating widespread and cohesive action that expands the leader’s domain of influence and leverage.
Meta-leadership: Introduction

The advent of global supply chains, outsourcing, strategic alliances, management de-layering, and other aspects the 21st century organization have significantly expanded the scope of responsibility for leading major organizations. It is no longer simply a matter of leading a well-defined hierarchical entity, but now necessary to exercise leadership across a network of entities both within and outside of the one’s own agency or firm. Within the organization, flat or matrix structures have increased the complexity of accountability, control, and exercise of power and influence. A premium is placed on nonhierarchical leadership (Meisel & Fearon, 1999). For the first time in the U.S, four generations are working at the same time (Hankin, 2005), each with different expectations and norms for leader and follower behavior and motivation (Hackman & Johnson, 2004). Confronted with this, leaders cannot afford to lead in traditional ways (Green, 2007). Beyond the four walls, the locus of function, be it production or action, often occurs at the nexus of relationships between a variety of parties that contribute to the function (Schilling, 2001). The transformation of the traditional organization requires the transformation of the traditional leader (Ashkenas, Ulrich, Jick, Kerr, 2002).

In this environment, leaders find themselves challenged to use influence as much or more than formal authority; authority and accountability structures are more reciprocal and relational (Wagner, 2008). Organizational boundaries function as semi-permeable membranes rather than hard walls with the involvement of other internal and external entities in the value chain. Such organizations are often complex, networked, emotional, and chaotic (Green, 2007).

The complexities of leadership in such an environment are often obscured by the focus of traditional theories that view leadership as a top-down leader-subordinate construct, typical of hierarchical organizations (e.g. Weber, 1905; Lewin, Lippitt, & White, 1939; Likert, 1967; Tannenbaum & Schmidt, 1973; Burns, 1978; Bass, 1985). Ancona and Backman (2010) found that approximately 85% of the existing leadership literature assumed a hierarchical leadership structure. Yukl (2002) argued that many leadership theories dealt with a single level of processes because it is difficult to develop multi-level theory. Multi-level reality, we argue, is what many leaders face and thus the impetus for our work. The traditional boss-to-employee relationship, for
one, has been formalized in clear roles, authority structure, rules, job descriptions, and responsibilities that prescribed performance and productivity expectations (Fernandez, 1991). Many relationships critical to leadership success are not so structured. (Hackman & Johnson, 2000). Theories of matrix organizations look at cross-functional relationships but generally within a single organization (Thomas & D’Annunzio, 2005). All of these are valuable but none are sufficient on their own for the multiplicity of challenges that a leader faces today.

These theories also do not fully capture what occurs when leaders must catalyze action well above and beyond their formal lines of decision-making and control. We argue that the best evidence of effective leadership in these situations is unified action among all stakeholders toward a common goal – which we call “connectivity.” To achieve this, we argue that leaders today must simultaneously lead “down” in the traditional sense, “up” to influence the people or organizations to which they are accountable, and “across” to activate peer groups and others with whom there is no formal subordinate relationship, and that these activities are parts of an integrated whole. We describe such broadly envisioned, overarching leadership as “meta-leadership” (Marcus, Dorn, & Henderson, 2006). Meta-leadership addresses leadership challenges that cross inter- as well as intra-organizational boundaries. This paper explores how meta-leadership integrates a wide range of leadership scholarship and maps critical interdependencies when these theories and concepts are applied in complex situations.

The Model of Meta-Leadership: Origins and Extensions

The meta-leadership model was developed observing and analyzing the actions of leaders in unprecedented crisis situations – post-9/11, post-Anthrax scare, post-Katrina, and other crises – as well as the preparation for the next-generation of such emergencies. We have worked in educational settings with more than 225 senior U.S. government leaders and tracked the impact of this work over a five year period. As the principles of meta-leadership were applied in a variety of situations, the observations are presented here as qualitative rather than quantitative analysis.
While the people we observed most closely were from public agencies, these were large, complex organizations with thousands of employees, hierarchical management structures, multiple stakeholders, and which, from a leadership perspective, lacking only the market-based financial pressures of their private sector counterparts. The crisis situations bring the leadership challenges into high relief.

We find these large public sector agencies ideal for this analysis as they are perceived to exhibit many of the characteristics of traditional bureaucratic organizations, and in many cases do, while increasingly needing to demonstrate connectivity across organizational boundaries. When one examines the criticism of the U.S. government after the attacks of 9/11, the attention is largely focused on the inability of the various intelligence and law enforcement agencies to coordinate their efforts (Kean et al, 2004). When one looks at the response to Hurricane Katrina, the failure of federal, state, and local agencies to act cooperatively and collaboratively has a prominent role in the tragedy (Davis et al, 2006).

The question must be asked, however, as to whether these situations are analogous to the challenges faced by leaders of organizations in other sectors and if the lessons learned are relevant. We believe that they are because:

- The foundational elements of understanding oneself and accurately diagnosing a situation are not dependent upon organization type or style; neither are the channels of action – up, down, and across;
- All organizations face their own highly fluid, emotionally charged situations – sometimes crises and other times opportunities – that involve stakeholders beyond their direct control. The difference between effective and non-effective leadership of the response can be measured in share price and sales volume in the for-profit sector; reputation and engagement across all sectors;
- As firms have become less hierarchical and more team-based, the need for leadership through influence has increased (Conger, 1998).

Meta-leadership has its greatest impact in situations with high stakes and a high number of stakeholders. Scale, scope, and complexity are perspectives not generally addressed in theories primarily examining mission, motivation, or power structure such as transactional vs.
transformational leaders (Burns, 1978; Bass, 1990). All meta-leaders are leaders first but not all leaders are meta-leaders.

The prefix “meta” is likened to its use in “meta-research,” which systematically identifies cross-cutting themes found in many different studies, or “meta-analysis,” which likewise combines and synthesizes findings about a range of questions in search of overarching thinking and conclusion. Meta-leadership connects what have otherwise been disparate areas of inquiry about leadership into a cohesive, interdependent framework. It is also likened to its use in “metamorphosis.” Not only must the leader catalyze change, viewing evolution as an active rather than a passive process, but must build and maintain a capacity for intentional leadership – able to remain proactive in the midst of circumstances that can otherwise be overwhelming.

**Output vs. Throughput**

Much of the leadership literature looks at its topic as a process. It presents a discussion and an analysis of throughput described as behaviors, relationships, and incentives. We argue that output, the “product” of leadership, is as important as that throughput. Meta-leaders seek to achieve results that cannot be accomplished by one organization, unit, or department – typically their own – in isolation. The objective can be as diverse as a streamlining the supply chain, launching a new product, or entering an emerging market, each of which demand change or accommodation by stakeholders outside the leader’s direct line of authority. These broad objectives both appeal to and require participation by people who work in entirely different sectors, organizations, and/or levels of a hierarchical framework. By intentionally linking the efforts of these many actors and many otherwise disconnected organizational units, the meta-leader – often operating without direct authority – is able to leverage and integrate their activities to accomplish something – an output – that would not otherwise be achievable (Schein, 2004). There is value in both the output – the “impact value” – as well as in the experience of the process (or throughput) – the “collaborative value.” The tangible progress – impact – amplifies the experience and rewards of working together – collaboration – and vice versa making the results mutually reinforcing.
The Five Dimensions of Meta-Leadership: Design, Concept and Practice

The five-dimension meta-leadership model serves as an organizing framework for the immense volume of leadership analysis, practice, and scholarship. Each dimension endeavors to encompass a body of research (see Figure 1) and a literature and we will make more detailed connections and citations in the discussion of each dimension.

<table>
<thead>
<tr>
<th>Dimension</th>
<th>One The Person</th>
<th>Two The Situation</th>
<th>Three The Base</th>
<th>Four The Boss</th>
<th>Five The Network</th>
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</thead>
<tbody>
<tr>
<td>Leadership Scholarship</td>
<td>Psychometric analyses, personal discipline, Self-awareness/emotional intelligence/resonance, authenticity</td>
<td>Situational awareness, complexity theory, risk analysis, decision-making</td>
<td>Organizational leadership and management</td>
<td>Leading up, followership, influence beyond authority</td>
<td>Inter-organizational relations, boundary spanning, systems theory, influence beyond authority</td>
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Table 1

Connecting the Dimensions of Meta-Leadership to Other Leadership Theory

As we have observed adoption of meta-leadership across complex public and private organizational systems and networks, we note three important advantages: 1) A conceptual framework and vocabulary that describes intentional networking and cohesion beyond formal organizational boundaries to connect the purposes and work of different stakeholders; 2) A purposeful strategy of action designed to advance coordinated planning and activity; and 3) A compelling mission and rallying cry for both leaders and followers that inspires, guides, and instructs, setting a higher standard and expectation for performance and impact. Meta-leadership enables significant positive and powerful outcomes become more achievable.

By design, meta-leadership addresses the complexities of generating a unity of action when many different people, organizational units, and even competing priorities are focused into a broadly adopted strategy, plan, or mission (Marcus et al., 2006). In concept, it is a question of
best aligning the plan of action with the problem or opportunity: what personal and contextual factors affect what meta-leaders see, perceive, decide, and ultimately act upon (Northouse, 2004)? In practice, it is a puzzle of optimally engaging three facets of organizational connectivity – up, down, and across: who are the many stakeholders that must be influenced and how can they best be leveraged to catalyze forward progress? What other entities should be engaged to create a greater probability of success?

These broad themes translate into the five components of meta-leadership practice. The first two, the leader’s self-awareness and an accurate perception of the situation are foundational conditions; optimal action is not possible without them. The other three are the dimensions of organizational or interpersonal action: “down” or leading in one’s designated purview of authority; “up” or leading those to whom one is accountable; and “across” or leading connectivity across the various entities. The meta-leader utilizes all five components, variably leveraging each dimension of thinking and practice as called for by circumstances, and always having these different yet complementary perspectives at hand.

What is distinctive about meta-leadership concept and practice is the intent to draw these many elements into a unified framework. The description of the dimensions below does not intend to describe or reference all that has been said or could be said on each topic, but rather to describe key aspects and their fit into the overall framework.

**Dimension One: The Person of the Meta-leader**

Meta-leaders begin with knowing themselves and the impact they have on others. A high degree of emotional intelligence (Burns, 1978; Goleman, 1996) is one critical characteristic of the person of the meta-leader. People who direct large scale or complex initiatives or operations must convey these attributes: self-awareness, self-regulation, motivation, empathy, and social skills. Self-awareness, in particular, has been shown to correlate with leadership effectiveness (Tekleab, Sims, Yun, Tesluk, & Cox, 2008). They have an understanding of the impact that personality, experience, culture, emotional expression, and character have on others: this is the “who” of the construct (Kirkpatrick &
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The self-discipline, drive, understanding, and capacity to form meaningful and satisfying relationships are critical in the effort to cross the usual divides and boundaries of organizational, professional, and cultural association (Goleman, 2001).

Whenever one operates outside of one’s formal purview or across clearly drawn boundaries, risk is increased. Thus meta-leaders must also understand how to build, manage, and keep trust, especially in situations where decisions and actions must be taken without complete information or certainty such as when operating in a volatile market. When people are evaluating whether or not to trust, they weigh factors related to the decision maker and the situation (Hurley, 2006). The meta-leader understands this dynamic and the appropriate actions to take to achieve the greatest commitment from a wide scope of stakeholders. Organizational cohesion in high stress situations has been found to be lacking where trust-based relationships are absent (Kolditz, 2007). In practice, when the leader presents a model of composure, balance, and appropriate perspective, followers are both calmed and persuaded to subtly follow and mimic the behavior of the leader.

The second critical component is that meta-leaders are willing to take a large, complex problem and filter through a wide range of possible solutions (Giuliani, 2002). They have abundant curiosity to imagine that which has not otherwise been discovered (Sternberg, 2006, 2007). That the meta-leader has an aptitude for seeing the bigger picture is particularly important in a fast-changing, emotionally charged situation such as a product recall, merger, or major layoff that may send parts of an enterprise into ‘crisis” mode.

These characteristics are important not simply because of organizational constructs, but also the hard-wiring of the human brain. In a stressful situation, the brain’s response is activated by the amygdala (Cannon, 1929, q.v. Bracha, Ralston, Matsukawa, Williams, & Bracha, 2004), a section of the brain triggered by fear and anger. It is where the primal responses of “fight, flight, or freeze” originate. These responses derive from primal survival instincts that work to suppress all other thinking in favor of a narrow range of “fight, flight, or freeze” behaviors (Society for Neuroscience, 1998). One cannot lead effectively when the amygdala is in control because it acts to overtake higher level thinking and strategic behavior in favor of panicked reaction.

Our term for this amygdala-controlled state is the emotional “basement.” The characteristics above enable the meta-leader to understand that he is in the emotional “basement.” and consciously move up to the middle level of the brain – the tool box – and help
lead others up as well – generally through ingrained routines and responses: the practiced procedures, protocols, or patterns of past experiences that trigger constructive activity and an aura of relative calm (Zander & Zander, 2000) – and then up to strategic thinking in the “new brain” or cortex. An example of this is what happens in a hospital when a patient suffers cardiac arrest. After a brief moment of recognition when the amygdala is activated and adrenaline is pumping for clinicians, they go into a rote set of actions. These are routine and well-rehearsed. If those “tool box” actions do not resolve the problem. The most expert member of the team will consider other options or considerations to save the patient – using the highest level of thinking. It takes great self-awareness, stamina, and discipline to control one’s gut-level responses in a stressful situation and intentionally elevate one’s mental activity. Emotional intelligence and a wide outlook provide the perspective to chart the possibilities and prompt this vital climb (Heifetz & Linsky, 2002).

**Dimension Two: Diagnosing the Challenge, Change, or Crisis**

The task of diagnosing and communicating the operational context – what is happening – is among the most difficult yet most critical to answer in any complex situation. Finding the most appropriate solution to a challenge depends first on precisely determining what is occurring (Bransford & Stein, 1993; Pretz, Naples, & Sternberg, 2003). This involves not simply observing surface phenomena, but “tuning in to the organizational frequency to understand what is going on beneath the surface (Goffee & Jones, 2006).”

The difficulty is compounded because there is often a gap between objective reality and subjective assessment (e.g., Hazleton, Cupach, & Canary, 1987). This is why Dimension One, self-knowledge, is so important to Dimension Two. This gap is further magnified when many different stakeholders are involved, when a great deal of information is required to diagnose the problem, when the stakes and emotions are high, or when the analysis and action are time constrained. In other words, the greater the complexity, the more difficult it is to develop an evidence-based, clear, and actionable description of what is occurring and thus develop the most appropriate response. This objective reality, and the ability to convey it to others, is at the heart of Dimension Two.

In practice, the meta-leader must grasp, work with, and narrow the likely reality-belief gap, aided by the collection of further information, the passage of time, and the perspective of hindsight. Such complex circumstances demand the capacities and skills for strategic “situational awareness,” (e.g., O'Brien & O'Hare, 2007) the connectivity between the personal capacities and understandings embedded in meta-leadership Dimension One and the realities of the situation that are addressed in Dimension Two.

Especially in times of stress, there can be difficulties in information flow between organizational units, competition among hierarchies, and priorities that are in conflict. The meta-leader can be caught in the cross-fire. In a complex situation, the many stakeholders involved naturally each have their own analysis and interpretation of the “objective problem” in accord with their distinct interests, concerns, and purposes (Australian Public Service Commission, 2007). The meta-leader also understands that each stakeholder uses a distinct “frame” built of values, experience, objectives, and priorities that filters what is seen and how risk is perceived. These frames, or guiding operational assumptions, themselves tend to be hard to see, appear complete but rarely are, and are hard to adjust (Clyman, 2003). The meta-leader looks for ways in which the differences can complement rather than contradict one another in order to integrate the divergent perspectives into a cohesive, new, value-added proposition. The meta-leader closes the gaps by building connectivity and identifying leverage points that can transform potential discord into opportunity. Rather than focusing on who is “right,” the meta-leader looks for how what each stakeholder brings can foster a greater understanding of the situation and development of a mutually agreed positive outcome. With a cohesive image of what is the problem, it is more likely that a wider variety of stakeholders will be motivated to contribute to the achievement of the solution. This analysis at times requires identification of confusing cross-cutting themes, priorities, and considerations in order to derive the most accurate “picture” of the event that is unfolding. The meta-leader recognizes that the size of the gap between perception and reality will shift, and hopefully diminish, over time. In practice, the anticipation of additional and more accurate information and the expectation that the situation will remain fluid for some time does not relieve the meta-leader of responsibility: it puts even more pressure to assess when there is enough information and when there has been enough debate to move to action. It is an iterative process of divergence and convergence with concrete intermittent points of agreement (Roberto, 2005). Herein one finds both the tension and the paradox of Dimension Two: in a complex
situation, a quick assessment that is close to the mark and moves the process forward is better than a slow though more accurate one that comes too late to make a difference.

The meta-leader understands that success and failure may be measured differently by different stakeholders (Daly & Watkins, 2006) yet the leader must make decisions and take action. To do this, she draws upon the capacities outlined in Dimension One to distinguish which priorities are most important to the overall endeavor and calculates both the potential upsides and downsides of each option for the different stakeholders. The meta-leader uses these calculations to move forward.

The meta-leader has the perspective and measured patience to work with ambiguity. If the situation was clear and every action had a certain and predictable cause and effect, the skills of the meta-leader likely would not be called into action. However, complex, multi-tiered relationships, high consequence organizational predicaments, and difficult inter-personal conflict each by their nature do not come with clearly obvious computations for what is right and what is wrong (Slaikeu, 1998). Not everyone faced with these ordeals is equally able to establish a calculated assessment and then rise to the challenge; these are among the strategic and analytic capacities uniquely associated with the meta-leader.

Dimension Three: Leading the Base

While the bulk of literature focuses on leading within one’s immediate base of operations. The meta-leadership model emphasizes aspects of that practice that complement other dimensions. Individuals who rise to be meta-leaders generally have their own organizational base of operations within which followers see them in charge (Phillips & Loy, 2003). In that entity, the leader carries formal authority, has resources at his or her disposal, and functions within a set of rules and roles that define expectations and requirements. Those subordinates expect adherence to allegiances and loyalties, trusting that the leader will advocate on behalf of their best interests (Heifetz, 1999). In bureaucratic terms, these accomplishments are often measured in expanding resources, authority, or autonomy for the entity and its members. In many bureaucratic settings, departments and divisions compete
amongst one another, and followers expect their leaders to triumph on their behalf (Lee & Dale, 1998).

For the would-be meta-leader, the support of his or her constituents is essential to achieving influence within the larger system. Understanding how he is perceived (see Dimension One), demonstrating an ability to diagnose and explain the context in which the group is operating (see Dimension Two), and having a productive relationship with his or her boss (see Dimension Four) are all critical to garnering that support. The size of the meta-leader’s follower base as well as the regard in which the followers hold the meta-leader are clear signals that can be read by other constituencies.

The meta-leader is a leader of leaders, and fosters leadership development throughout the system, though first at home among his or her constituents. Leadership, after all, does not reside with one person. In robust organizations, it is embedded among many people and at multiple levels of the hierarchy (Northouse, 2004). This requires a sense of leadership confidence and security: strong, smart, capable followers are not seen as a threat but rather as a vital asset (Sternberg, 2007). They seek followers strong enough to challenge them on occasion (Goffee & Jones, 2006). It is the meta-leader’s devotion and commitment to his followers that generates the same from those followers. Subordinates do not follow the meta-leader because of a pay-based transactional relationship but rather because they believe in what the meta-leader stands for and is striving to accomplish.

What if the would-be meta-leader has not effectively engaged the commitment of his or her direct followers? It would be awkward and difficult for him or her to establish credibility in the wider system if that quality is not established in the home base of operations (Romzek, 1990). Followers in fact serve as ambassadors for the meta-leader, amplifying the efforts and attitudes of the meta-leader by creating their own linkages among counterparts in other organizations. Without their support, it would be difficult to leverage influence and activity beyond the scope of immediate authority. And of course, much of leadership is modeling – thinking, behavior, and action that others not only follow, but mimic. Both strengths and weaknesses are imitated (Hermalin, 1998). Close-in colleagues and constituents best know their leader and often are the arbiters of their leader’s climb to meta-leader.

In Dimension Three, meta-leadership is closest to Transformational Leadership in the literature. Meta-leaders reframe the mission and both envision an expanded self-interest that
engages disparate constituencies. There is an emphasis on communication, innovative thinking, and trust building. However meta-leaders may also challenge the established organizational values and norms, not something typically ascribed to Transformational leaders (Northouse, 2004).

The unity of purpose and reliability of achievement that the meta-leader inspires throughout his direct domain of responsibility is the foundation for work beyond the direct confines of official authority and power. The confidence, direction, and dependability fostered within serve as the exemplar for what is communicated to the larger system of influence and action. That same momentum could serve to impress or intimidate his boss, a critical factor for the fourth dimension of meta-leadership.

**Dimension Four: Leading Up**

Most people who work in organizations have a boss. The Chief Executive Officer of a publicly traded corporation has the board of directors; below the CEO are a series of senior managers who report to him or her and who, in turn, serve as bosses to their staffs. A public sector agency is headed by a Director, Secretary, or Minister who in turn ultimately reports to the President or Prime Minister. Non-profits are headed by Executive Directors who report to a board of directors.

Dimension Four, being able to effectively influence those to whom one is accountable, is an important element of wider leadership within the system. Followership, like leadership, is a matter of rank and behavior (Kellerman, 2008). Meta-leaders do not let rank be a limiting factor but are careful not to upstage their bosses except in the most extreme of circumstances. By carefully cultivating and managing the most productive relationship with the boss, the meta-leader/subordinate may end up with as much or more power and influence than his or her superior (Kellerman, 2008).

The meta-leader is a great subordinate in that the meta-leader tells truth to power and, in being willing to speak out, demonstrates the initiative critical to leadership (Bennis, 1989). The meta-leader/subordinate can bring to the boss a valuable perspective when he has closer proximity to the work, has greater subject matter expertise, and can better sense the problems on
the ground as well as solutions to address them. Strategic decision making entails simultaneous activity at multiple levels of an organization; the meta-leader as follower can help ensure that the boss is connected and informed of both formal developments as well the “offline” work that happens in small groups or in one-on-one conversations (Roberto, 2005).

In leading up, the meta-leader helps the boss see the right goal and advances the organization toward that goal regardless of personal costs or benefits (Useem, 2003). In so doing, the meta-leader crafts vertical connectivity and bi-directional feedback. Influence is shaped by informing and educating the boss. Bosses of course vary in style and temperament, and the meta-leader appreciates that as with any relationship, this is one that must be carefully and strategically managed (Marcus et al., 2006). The great meta-leader/subordinate manages assumptions, does not promise what cannot be delivered, and assures that the boss is never surprised. This last point is a sensitive matter. While bad news and valid criticism are hard to deliver, followers who tell the truth and leaders who listen to it are an unbeatable combination (Bennis, 1989). Meta-leaders also remember that the boss has a boss and work to ensure that they are providing the information and support necessary for his or her boss to lead up as well.

**Dimension Five: Leading Across the System**

In building a wide sphere of influence, the meta-leader grasps that just as vertical, “up-down” linkages are important, so too are horizontal linkages. By leveraging adjacent centers of expertise and capacity, including resources and assets outside of his or her own organization, the meta-leader is able to engage the spectrum of firms and other organizations that are to be recruited to the extended network (Ashkenas et al., 2002). Generating connectivity could be limited to proximate organizations, or could be more broadly defined to incorporate constituencies, such as customer groups, that may not have been traditionally considered. Dimension Five is the ability to generate a common, multi-dimensional thread of interests and involvement among entities that look at a challenge from very different yet complementary vantage points. By combining their assets and efforts, the meta-leader envisions and activates more than what any one stakeholder could see or do on its own.
Why is this both important and difficult? While an opportunity may be apparent to all, it may not be as obvious that only by collaborating can each of the entities maximize the return – especially if that collaboration requires sharing proprietary knowledge or technologies, opening systems or processes, or contributing some other asset such as a brand name that is viewed as a source of competitive advantage. These different stakeholders may not, on their own, recognize the greater impact that they could generate together. In fact, they might very well see themselves in competition with one another. The first challenge for the meta-leader is defining what working together looks like along with its benefits – and why it is urgent to act now (Kotter, 1996). To be effective, the meta-leader must influence and engage the many different entities that are to be linked into the shared effort envisioned by the meta-leader. The people representing each entity must be moved by the powerful advantages of acting in concert and by the enlarged possibilities generated by working together. And they likewise must be assured that individual units will “stay in their lanes,” avoiding the tendency to wade into one another’s areas of responsibility or authority, a move that would raise the competitive ire of others and ruin opportunities for collaboration.

There are many hurdles to overcome. Chief among them is egocentric opposition from potential collaborators: the “silo mentality” of people and organizations as well as turf battles among those involved (Hughes, Ginnett, & Curphy, 2006). Within the comfortable and familiar confines of distinct organizational units success is measured, rewards are achieved, careers are advanced, and objectives are sought attuned to the interests and well being of the silo and its constituents. There is a natural tendency for people to ask “what’s in it for me?” The potential for creating cross-cutting benefit is curtailed when silos that could be working together see themselves merely as competitors (Schuman, 2006). The meta-leader is able to focus attention on the shared opportunity while at the same time tempering those forces of suspicion and jealousy that constrain their achievement (Marcus et al., 2006).

To do this, the meta-leader must identify and understand the individual intrinsic motives of these different stakeholders to create linkages in thinking and action by aligning these disparate yet complementary spheres into a unified plan of action. Each entity must be recognized for its unique profile of interests, experiences, and contributions to the shared enterprise. While it is common for people to focus upon the differences and conflicts among them, the meta-leader turns the attention to points of agreement: shared values, aspirations,
objectives, and circumstances. With a new appreciation for their points of commonality, stakeholders are able to creatively envisage what they could accomplish together – an end state that this desirable and compelling for all, building new equations of common ground and achievement. Often, this requires strange bedfellows to work together, enemies to be invited to a common table, and people to appreciate a new or different set of values, objectives, and incentives. The intrinsic motives of each individual are thereby harnessed to achieve what is accepted as the greater good (Marcus, Dorn, Kritek, Miller, & Wyatt, 1995). The meta-leader knows action and early triumphs are a critical factor in demonstrating the value added of working together (Kotter, 1996).

Push-back and resistance are to be expected in fashioning this new alignment of strategy and action (Bornstein, 2007). Bureaucratic entities characteristically reward internally focused leadership that simply builds the budget, authority, and autonomy of their own endeavors (Thompson, 1965). The introduction of collaboration may require some traditionally competitive constituencies to turn away from well entrenched attitudes about and behaviors toward one another (Goldsmith & Eggers, 2004). If such push-back and resistance is anticipated and planned for, it is far less likely to undermine the shared purposes (Yukl, 2002). Expecting it, meta-leaders craft an alternate reward structure, through which stakeholders are acknowledged and encouraged for their work in building shared solutions.

Cohesion of action cannot begin in the moment of decision and action: it must be embedded into the thinking and activity of firms and people, a purpose and mission upheld by the meta-leader (Daft, 2005). It is akin to carefully crafting interlocking gears: when it is time to move, the cogs link in a way that ensures movement and not stasis. For this reason, designing cross-system linkages of action is a strategic and methodical building endeavor, by which both the process and outcome of the effort attest to the value and benefits of working toward common purposes. As stakeholders experience the demonstrable advantages of leveraging the expertise and capacity of others, and as they recognize the added influence gained when their contributions are likewise leveraged by others, impact and collaborative value both rise. Even so, the meta-leader recognizes that to keep the shared endeavor on track, these linkages must be carefully monitored and adjusted: so they survive the expected bumps and remain current with new developments, demands, and challenges.
Connectivity: The Outcome and Effect of Meta-Leadership

The work of meta-leadership is in forging a strategic connectivity for coordinated effort among stakeholders, reaching past the usual bounds of isolated organizational thinking and functioning. This connectivity is carefully orchestrated among distinct components of an endeavor that must be intentionally assembled, shaped, and linked. In such a connected system, each individual and organizational unit is aware of its role in the whole: those up and down the organizational chart as well as those across the spectrum of entities that are part of the enterprise. There are a number of critical questions: How do we define success and encourage it across the organizational spectrum? What are the critical dependencies? How will information, resources, and assets flow? How will interests and incentives be optimally aligned? How will rewards be distributed? It is up to the meta-leader to compose a compelling, integrated picture and message, engage each actor, and chart the impact they together will create (Dorn, Savoia, Testa, Stoto, & Marcus, 2007).

Connectivity is fundamentally a very human process (Maslow, 1970): people sharing a common and compelling purpose that blends their organizational allegiances with their commitment to what can only be achieved when different groups of people are working together. This requires the meta-leader to have a strategic view of who needs to be involved and what will motivate their participation. People moved by the vision and message of the effective meta-leader are inspired and empowered to reach out beyond the confines of their particular roles. They create linkages with others that enable a potential that would not otherwise be present. They then embed those connections institutionally so they persevere beyond the tenure of the individuals involved. These people-to-people and organization-to-organization linkages overcome the barriers and gaps imposed by strict “silo” thinking. Whereas organizational structures can mold and confine the behavior of people in roles and procedures, people, when connected, find ways to accomplish the shared impact value that is achievable with their combined effort (Schuman, 2006). This does not necessarily imply that rules are broken. Rather, rules are seen more as levers to make positive things happen. It describes the difference between succumbing to obstacles and seeking out opportunities.
Building connectivity does not require “tearing down the silos.” In fact, silos have important functions. Training, practice, professional advancement, and new knowledge and skills occur in the concentrated environment of the silo.

When connectivity is achieved, individuals and the entities in which they work are better able to leverage one another. They can do more because they have a wider scope of resources at their disposal. Information is more readily available, expertise is more widely accessible, and tangible assets are more generously shared. Inter-entity competition as a primary motivator is reduced because success is less about prevailing in a turf battle and more about achieving the overriding goals of the shared enterprise (Dorn et al., 2007).

**On Being a Meta-Leader**

What does it take to be a leader and what further is required to assume the added challenges of being a meta-leader (Bennis & Nanus, 1985)? To be sure, there are many who occupy positions of formal authority who may think themselves leaders when in fact their influence is marginal or their position even resented (Bennis, 2003). These people beg the question of just what is leadership and how it differs from management or command-and-control power (Zaleznik, 2004). Similarly, it is tempting to anoint oneself a meta-leader, a distinction that personifies an analytic perspective and broad scope of influence.

What is the difference between leadership and meta-leadership? Leadership often refers to the acts taken within one’s recognized or expected span of authority in one’s formal role. For example, the chief executive officer of a business is expected to demonstrate leadership in the way the company is operated, setting the vision and the strategic direction of the enterprise, and in achieving its performance objectives. That same CEO would be considered a meta-leader when he, for example, engaged related organizations to create joint ventures, strategic alliances, or other connections that would allow each business to accomplish more than if they were operating in isolation. While not all leaders are meta-leaders, all meta-leaders operate from the base of influence and capacity derived from successful leadership of their own organization or frame of reference.
Meta-leaders galvanize others through their capacity to articulate and achieve these linkages and outcomes, appealing to more than just personal gain or parochial organizational interests. Meta-leaders convincingly define a higher purpose – making the case that by acting above, beyond, and across the confines of their own organizational entities, the component members will accomplish more and function with less friction, and therefore the work each involved will be more rewarding. When effectively presented, the meta-leader’s vision and the process charted are so compelling that others follow (Nanus, 1992). In doing this they utilize some of what has been described as Transformational leadership (Burns, 1978; Bass, 1990). They must also, however, demonstrate effectiveness with constituencies beyond those who would traditionally be described as their “followers.” Additionally, they must be able to work with (and sometimes within) organizations that are traditionally bureaucratic, such as regulatory and government agencies, or structures such as collective bargaining agreements that prescribe a transactional relationship. Transformational leadership alone does not capture the capacity and capability needed to exert such leadership. Able to identify the gaps between what could or must be done and the will and capacity to do it, meta-leaders coalesce the knowledge, organizational workings, and context to achieve an otherwise unachievable cohesion of effort (Kotter, 1996). They navigate multiple environments and constraints in order to achieve the over-arching objective.

Meta-leaders combine two aspects of the leadership equation to create a broad expanse of influence. The first is traditional hierarchical leadership, their primary source of recognition and authority (Jaques, Clement, Rigby, & Jacobs, 1985). The second aspect of this equation is akin to social movement leadership (Barker, Johnson, & Lavalette, 2001), what religious leaders, political figures, and humanitarian advocates exercise to inspire and engage people when they do not have the power of a pay check, promotion, or sanction to persuade followership. It is that blend of commitment to a purpose, charisma, the talent to motivate, and appreciation for the fine art of timing that is at the heart of the informal side of leadership performance. While the exercise of formal leadership incorporates a measure of these qualities, meta-leaders must do both as they influence and rally others – without direct authority to command participation – to a shared, broader purpose.
While one can be hired to the role of leader, one must earn the mantle of meta-leader. It is accomplished without formal sanction. Not all CEOs have industry-wide impact or play larger roles in the communities in which they operate. Those who do are meta-leaders.

**Conclusion**

Organizational forms evolve to better meet the needs of the marketplace. So, too, must leadership styles and methods. For the first three-quarters of the 20th century, command-and-control dominated both management and leadership in Western countries, in part because much of the managerial class shared the experience of military service. It was a familiar model with centuries-old roots. With the growth of information technology and globalization, however, firms have become flatter, work has become more team-centered, and multiple organizations have been linked in new and novel value chains.

The command-and-control model does not work well in this environment because the relationships within it are highly collaborative, are often guided by general principles as much as contractual requirements, and require commitment to an enlarged self-interest. Meta-leadership is a model and framework well-suited to environments that are built on trust and influence more than formal authority. Additionally, even the leadership within firms has become more distributed as firms have shed layers of management, relied more on self-organizing teams, and challenged employees to find new solutions rather than simply execute orders from above.

The meta-leadership model described here emerged out of observation and analysis of leaders in crisis situations involving tense emotions and highly fluid circumstances. In such instances, collaboration across networks and leading by influence are critical to survival. It also emerged out of the triumphs and failures of leadership at the time: the difficulties in getting organizations and people to work together when that connectivity of action was the best hope for mounting an effective response; and the inspiration and results when communities, businesses, and public agencies joined forces to accomplish what otherwise would have been inconceivable. Finally, it draws on the expanding understanding of neuroscience and brain function to both diagnose the root cause of behaviors under stressful conditions and suggest pragmatic countermeasures leaders can take to rise to the demands of the situation.
While the application of the meta-leadership model in business settings may not be so
dramatic, it is no less important. The correlations between the two situations – the need for fast
action, collaboration across organizational boundaries and among divergent stakeholders, and the
focus on achieving positive outcomes to name just three – speak to the value of the meta-
leadership model for guiding both daily leadership and crisis leadership.

In this complex web, extraordinary leaders emerge, able to generate greater value by
balancing the expectations, needs, and contributions of all of the players in the extended
enterprise. For those meta-leaders who excel in their strength of character, keen analytic skills,
the ability to lead, follow, and engage a wide range of people extends their influence well beyond
their formal authority. They forge both impact and collaboration that would not have otherwise
been achieved. These meta-leaders – who certainly predate this model that seeks to describe
them – deserve further study so that their important work and contributions can be better
appreciated and understood, better supported, and taught to others.

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