THE WORKING JOURNEY

Cross-functional work – a method for getting it sorted

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Question:

I was wondering if I might be able to seek your guidance on sorting out cross-functional relationships. Is there a process you suggest we follow so we can really sort ourselves out so we can be a better organisation for both customers and employees?

Answer

Very glad you asked – getting clear in this area is about ***not forcing people to rely on favours and politics to get their basic work done***. It's a service to our fellow humans!

Cross-functional roles, or 'Task-Initiating Role Relationships' (TIRRs) as Elliott Jaques referred to them are how work gets done. We tend to see the org chart as reality, when it's actually just a visual representation of who reports to who, and what each person is there to deliver. In reality all work is passed on to someone, either internal or external – so all work is some sort of flow, which means…it mostly goes across.

This means that it's one of the fundamental accountabilities of every manager to set up how work 'works' in their area. And a crucial part of this is the TIRRs.

So how do we do this? First we start with WHO.

We teach in our workshops and our online learning that the person who is best positioned (and so we make accountable) for making the final decision on how work works we term the '***Crossover Manager'. This is the lowest level manager we can find that has authority over nearly all of the roles (and resources) we are talking about.*** If we're within a team, it's the manager. If it's teams of teams, it's the Senior Manager or whatever titles you use. And yes, this can go all the way up to the CEO.

(And no one likes taking this to the CEO, and CEOs feel like someone else should sort this out….which is why cross-functional relationships are usually the biggest source of frustration as no one actually makes a decision).

So **Step Zero is find the relevant Crossover Manage**r and let them know that this is actually their job. And if they don't do it, they are dooming their people to endless discussion and frustration over who gets to ask who to do what.

Now…in the end, ***cross-functional relationships are a decision of the cross-over manager.*** It's not a matter of 'sorting it out', or 'working through it'. It's a simple decision that needs to be made. Here's how they do it: **First** - *identify the bigger picture purpose* – who, in the end, are we all serving, what are we providing, and what matters to them in terms of what we provide? If we don't to this, we're working without context. By 'we all', we are talking about those who's roles we are sorting…the full team, department, business unit, organisation. Whatever it is.

Second – for each role, *clarify why it exists, and what is expected to deliver for who* (usually called 'accountabilities' or something like that).

Third - consider for each role *a) what other roles does it interact with, and b) what does it need those other roles to do (or not do) so it can get its job done*. Here's an example – WHS person is accountable for providing support and advice on matters of safety. Usually as a minimum this role needs managers in the line to at least listen to what they have to say.

Fourth (here's the part crossover managers avoid) – ***decide what you want the people in the roles to do if they don't agree***. In the example above, what happens if the Line Manager doesn't agree with what the WHS person is telling them in terms of how to keep people safe and stay legal? Do we want the Line Manager to a) listen then do what they think is right; b) wait so both can go and see their manager to get clarity (i.e. escalate) or; c) stop work and change until the WHS person is comfortable.

You can see how each of the above three options creates quite a different scenario, and if there isn't understanding between the two on which one….they are doomed to call each other names like 'loose cannon' or 'bureaucrat'…when in reality ***both are simply doing what they believe they are paid to do.***

Time to step-up, crossover manager, and make a call (Jaques lays out some nice options for these relationships which I'll list below…it's like a 'menu' to choose from).

Fifth – once we've made a decision (and I repeat, it's a decision, a choice, not a 'process' or a 'we really need to look at that' thing. Just choose!) – *let everyone know how things work*. "Hey all, Jill's here to make sure we stay within risk guidelines. Give her what she asks for, and I've asked her to give you advice. If you disagree with her advice, that's fine, but I want you both to come and see me before going ahead". Something like that. Put them in the role descriptions too, but remember that reality is in actual communication and addressing it when things don't work as was decided.

A WORD ON PROCESS

While this is a decision of a crossover manager in the end, like all managerial decisions, it is very unwise to not ***take the advice of all of those who will be affected by the decision.*** Same with this – it's a good idea to get everyone involved in a room to go through together the steps above. Visual aids like large post-its with the purpose of roles written on them, arrows to the other roles they connect to for their work to be done, the role relationship written on it…that sort of thing (we do these sessions all the time, they usually uncover some deep stuff that hasn't been sorted for years because no one simply made a decision).

Now…***it's going to be tempting to run this without the crossover manager in the room, then take it to them after for a rubber stamp. This is not going to work (I say this from direct experience!). The crossover manager needs to understand <u>and own</u> their own organisational design***, and if they aren't involved in the conversation and hear and see the current pain and what people need….they never will. And they'll never get good at setting the role relationships in the future which we will be doing again as the work changes or if issues occur. Making decisions such as this quickly and well is necessary for a responsive and adaptive organisation.

So, time to be brave and refuse to do this work unless the crossover manager is involved and is ready to make decisions.

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THE CROSS-FUNCTIONAL RELATIONSHIPS

Here are the cross-functional relationships Elliott Jaques identified in his decades of research. We use them because they're useful. Simple as that!

First, a general principle – give service or support areas the ***minimal possible authority*** to get their job done. It's not effective to take authority away from those that serve customers (i.e. the line) and to give service areas too much authority eventually leads to the scoreboard operators telling the team how to play. Everyone loses in the end if you're there, and it's one of the major sources of organisational malaise.

Now, the relationship options, we sometimes refer to these *after* the crossover manager has decided how things will work, and sometimes we go over these first to give people an idea:
These three go together, usually for a specialist who is there to 'check up', or 'keep an eye on things'

- **Advisory Relationship** – you have to listen, you don't have to follow the advice. If things go wrong, it's on you, not the advisor.

- **Monitor Relationship** – you have to listen, if you don't want to follow the advice, hit the pause button then escalate to get clarity. And go together when it's escalated. It's not a personality fight, it's a clarity thing.

- **Audit Relationship** – you have to listen, and you can't continue until the person advising is happy that things are within limits.
Then we have this one:

- **Service** – this is when a role exists to provide service to another. IT helpdesk is a classic here. HR for recruitment. This relationship doesn't mean 'do what I want when I want', it mean '*can you deliver this by then, if not, what can you deliver by when*'. ***The obligation on both is to communicate and keep promises, which means not making promises that can't be kept.*** If the service can't be provided when needed, we escalate. Not as a matter of competence, but as a matter of priority.

- *(By the way…Service is the basis of all work-flows – the next person in the flow is saying to the previous person "this is what I need from you to do my bit". If we can get this clear, we can significantly reduce the amount of 'dirt' in the flow that causes rework…all of which leads to customer and employee pain. It's a simple question – each person simply asks the next 'what do you need from me to do your part well?". It's a simple question that makes a huge difference that we don't tend to ask.)*

Then there's;

- **Coordinate** – this relationship allows a person to 'get the band together'. For people on the other end, it means that going to that meeting is not an optional extra, it's actually part of your job. This relationship is not only useful for things such a Work Safety Committee and the like, it's also the crucial one for getting any work system working well. The biggest impediment to getting a process working is the ability to get everyone necessary into the room. Setting up clear Coordinate Relationships with Service also alongside now ***allows someone who is managing a work system to actually get it fixed***.

And a couple of extras:

- **Prescribe** – you must do what I say when I say it. This is only for Fire Wardens, and we also see it with actual prescriptions from doctors. Never give this out lightly.

- **Collateral** – this is the natural role relationship of team members. You can advise each other, ask what's going on, if you disagree about the bigger picture we

get the team together and the boss to sort it out.
So there's the 'menu' of Elliott Jaques' cross-functional role relationships or TIRRs.

FINAL POINTERS

This stuff only matters when people disagree. That's why we do it – so people don't have to come running to the boss if they don't see eye-to-eye (unless that's the role relationship!).

We only need signposts on the busy intersections. You don't need to sort out every cross-functional relationship. But if it's crucial for customers getting what they were promised or for viability and safety…then it's worth making a decision.

When there's a crash at an intersection – put up a signpost. While we don't need to do all, we'll always miss some we should have. Every time there's a crash (frustration)…there's an opportunity to decide and clarify a cross-functional relationship. This is why we insist the crossover manager is part of the session…because if they aren't, they won't be able to sort out the crashes so they don't happen again next time.

Above all, as Peter Block says: The Answer to How is Yes. If a crossover manager says 'yes' to sorting this stuff out – you're well on the way to improving your organisation.

References

Jaques, E; Requisite Organization; Cason & Hall, 2006

About

Adam is partner of The Working Journey, a consultancy founded in 2001 by his fellow partners Andrew Olivier and Verena Maclean. Along with their team of Associates, they work with CEOs, Owners, Executives and Managers who want to design a responsive enterprise that sets up people to do great work.

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