

# **Shared Team Leadership:**

## **Is it a Dual Model,**

## **Or a Duel Model?**

---

June 14<sup>th</sup>, 2004

**Joseph A. Carlino, Ph.D.**

**Senior Director and Project Leader**

**BioPharmaceuticals Development Management**

**Chiron Corporation**



# Presentation Overview

## Shared Team Leadership

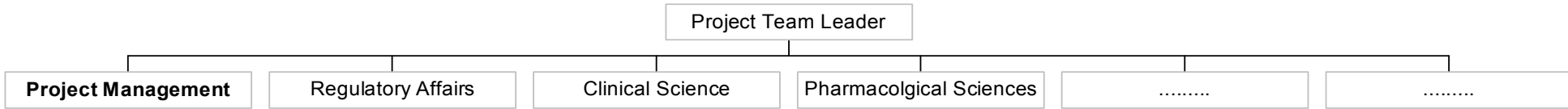
---

1. What it is and why use it?
2. How do you use it? Definition of roles is critical.
3. Challenges of the dual leadership model.
4. Case studies
  - A. Doing it wrong
  - B. Doing it right
5. Attributes of a successful PL/PM dual leader relationship.
6. Aspects of dual leadership applicable to single leadership
7. Summary and conclusions

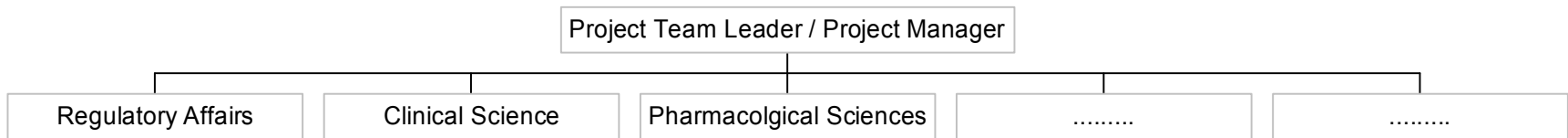
# Session Overview

## PM & PL Roles to be Considered

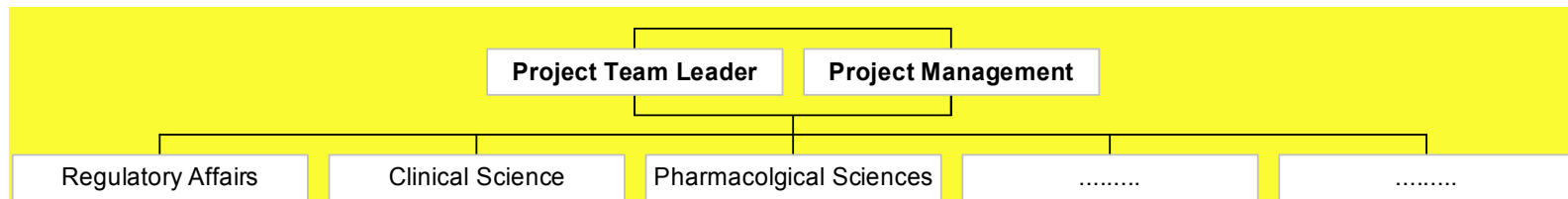
- Project Managers as Team Members



- Project Managers as Team Leaders



- Shared Team Leadership



# Whattaya Mean, *Dual* Leadership?

Recognizes and Optimizes Manager/Leader Role Duality

Balancing the  
Roles of the  
PM and PL

## Overlap

<u>Activity</u>	<u>Manager</u>	<u>Leader</u>
<ul style="list-style-type: none"><li>• Creating a plan</li></ul>	<ul style="list-style-type: none"><li>• Defines tasks &amp; budgets</li></ul>	<ul style="list-style-type: none"><li>• Establishes direction &amp; rationale</li></ul>
<ul style="list-style-type: none"><li>• Developing the team and network to realize the plan</li></ul>	<ul style="list-style-type: none"><li>• Directs with structure, role definition, timing, &amp; staffing</li></ul>	<ul style="list-style-type: none"><li>• Aligns team by words, deeds, and conduct</li></ul>
<ul style="list-style-type: none"><li>• Executing the plan</li></ul>	<ul style="list-style-type: none"><li>• Controls by monitoring and communicating across and down</li></ul>	<ul style="list-style-type: none"><li>• Motivates, inspires, and communicates across and up</li></ul>
<ul style="list-style-type: none"><li>• Achieving the plan</li></ul>	<ul style="list-style-type: none"><li>• Produces order and predictability</li></ul>	<ul style="list-style-type: none"><li>• Produces change and opportunity</li></ul>

**To be an effective leader, you have to know when to manage.**

**To be an effective manager, you have to know when to lead.**

Adapted from "Effective Leadership: Teambuilding", @ <http://leadership.gc.ca>

# Why Consider Using a Dual Leadership Model? (Besides Optimizing PM/PL Overlapping Roles)

Balancing the  
Roles of the  
PM and PL

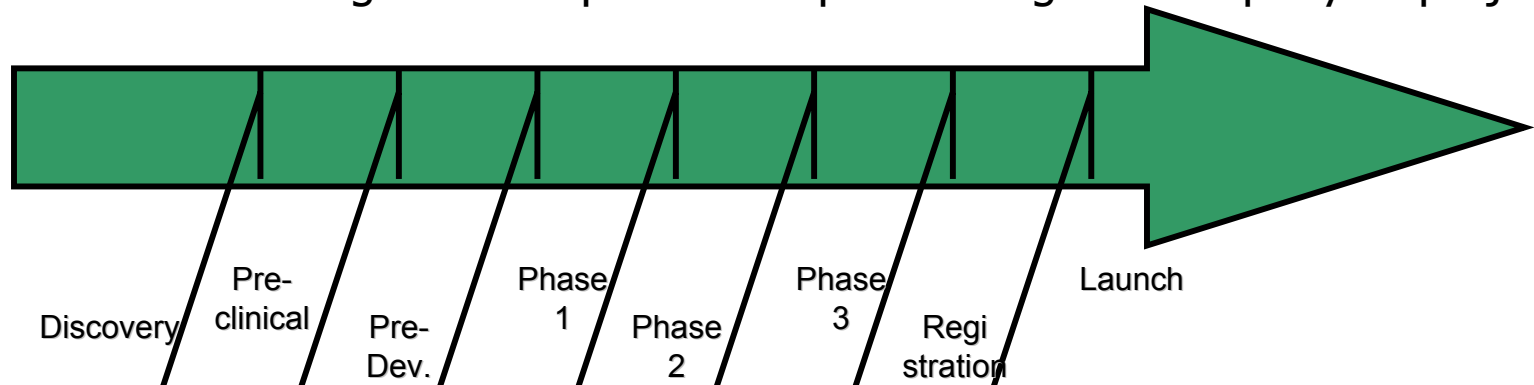


*"Will you please stop trying to appear larger than life?"*

- Increased opportunities to use and *build* leadership capabilities
  - Opportunity for less experienced or new PMs/PLs to learn
  - Proactive balancing of approaches, styles, and expertise
  - Regular exchange of approaches and ideas between peers

# Why Consider Using a Dual Leadership Model? (Besides Optimizing PM/PL Overlapping Roles)

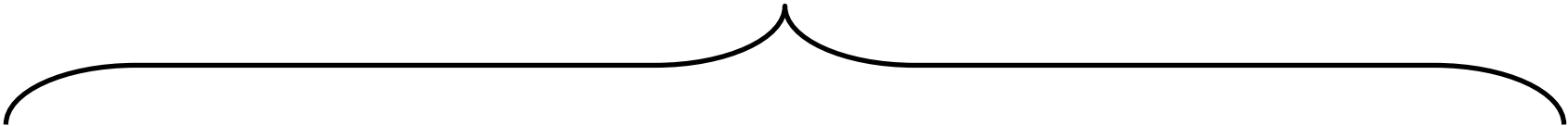
- Increased opportunities to use and *build* leadership capabilities
  - Opportunity for less experienced or new PMs/PLs to learn
  - Regular exchange of approaches and ideas between peers
  - Proactive balancing of approaches, styles, and expertise
- Challenges of project(s) or corporate setting warrant it
  - Complex partnered project requiring greater leadership support
  - Geographically dispersed project with high travel requirements
  - High profile project needing greater level of up-management
- Facilitates customizing leadership to development stage of company or project



**Project Co-Lead = Research->Pharm/Tox->CMC->Clinical->Regulatory->Marketing**

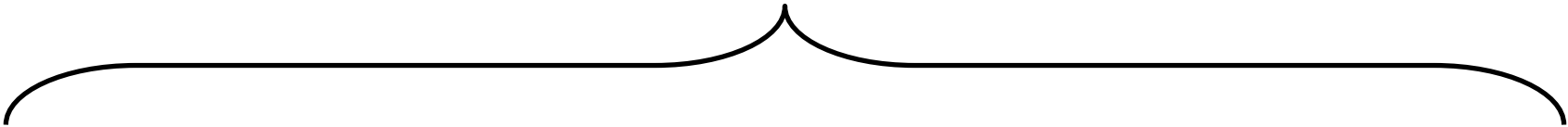
## **Authority**

Decision-making responsibility  
(power to command, determine, or judge)



## **Accountability**

May not execute the work, but are still responsible for it and its impact  
(answerable)



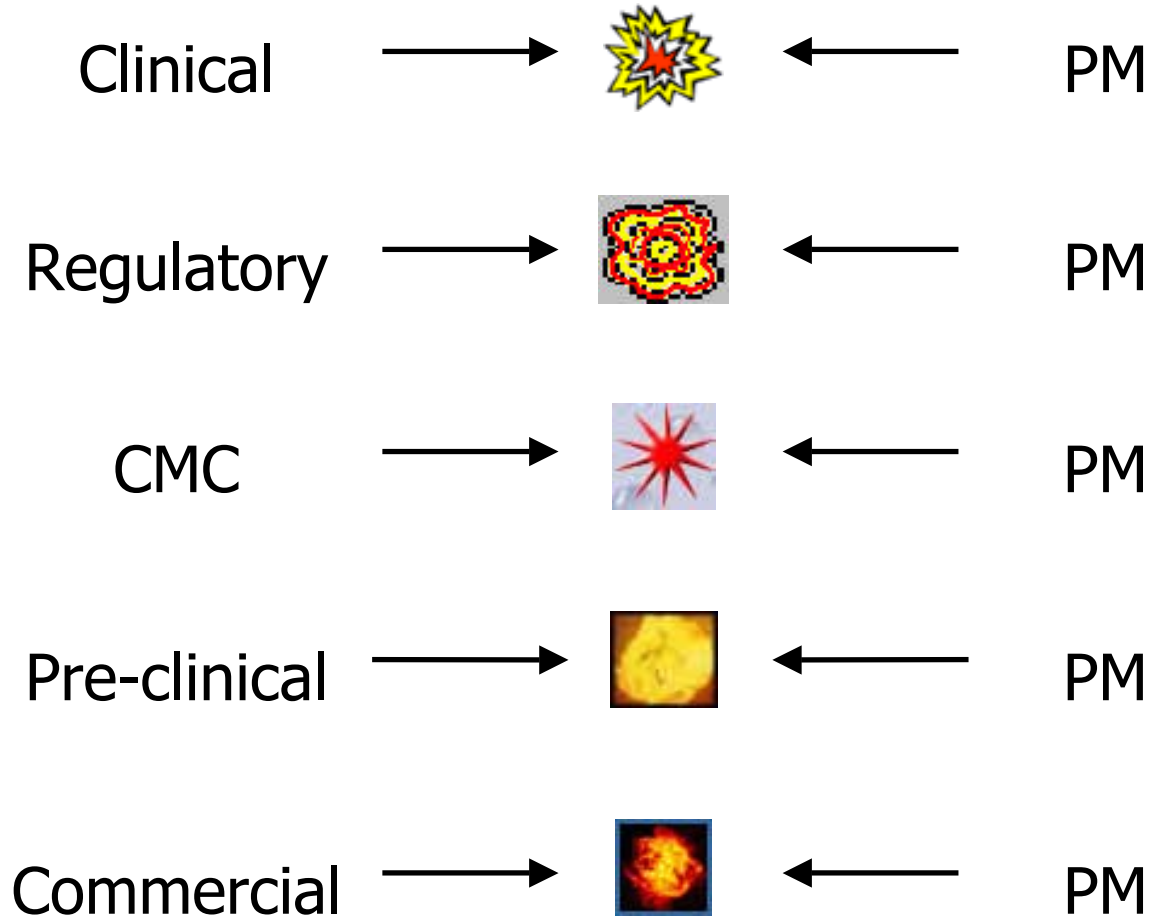
## **Responsibility**

Execute &/or define the activity, analysis, report, etc.  
(Being the source or cause of something)

# Role Definition Will Be Dependent Upon Individuals

## Situational Leadership Taken to a New Level

- The need to consider the unique “chemistry” of the particular co-lead mix is critical to forming a successful dual leadership.



# Challenges of the Dual Leadership Model

## Issues That Can Arise, and Definition of the Root Causes

Power struggles  
Scope creep of accountabilities

} Lack of role definition

Unequal workloads  
Inconsistent messages  
Leadership/management issues not being addressed

} Lack of communication and coordination

Inconsistent work ethics  
Incompatible leadership styles  
Clashing of "team advocate" vs. "objective, realistic evaluator"  
Potential conflict with functional area responsibilities

} Differing experience or philosophies

Confusion/inconsistency in interactions with team members and senior management

} Lack of clear point of accountability

# Shared Leadership Case Study

## Analysis of a Duel Relationship

- **The Leadership Relationship**

A dual leadership pairing where the roles were never explicitly defined, but were claimed by (self-defined) abilities and occasionally staking claim.

- **The Players** - PM JC, Co-Lead ZZ

- **The Challenges / Duels**

- Scope creep of accountabilities
- Lack of coordination of management/leadership
- Leadership clashes over advocate vs. objective evaluator roles

- **Root Causes and Lessons Learned**

- Single point of accountability and role definition needed to clarify interactions with functional areas (Who wanted to know, “Who do I talk to about this?”)
- Lack of communication and coordination
  - » Knowledge base is truly equal
  - » Both can contribute to strategy

# Shared Leadership Case Study

## Analysis of a Dual Relationship

- **The Situation**

A newly formed dual leadership pairing where the roles were put on paper for discussion and agreement.

- **The Players**

PM JC, Co-Lead AA

- **The Advantages**

- Initial joint, then alternating coverage of (e.g.) CMC activities to insure good coordination with clinical and tox
- Better ability to manage individual team members
- Good cop / bad cop opportunities

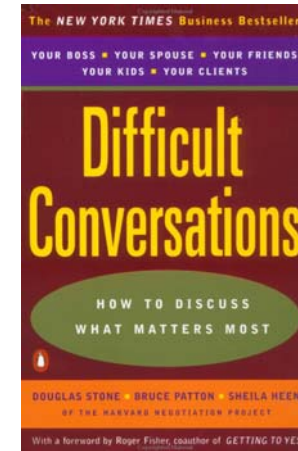
- **Root Causes and Lessons Learned**

- True co-leadership relationship allows team two resources for issues, ideas, etc.
- Regular meetings and phonecons between co-leads were, of course, required.
- Both co-leads are in position of expanding knowledge base.

# Skills and Attributes Needed for Sustainable Co-Leadership (The Marriage Analogy)

Balancing the  
Roles of the  
PM and PL

- Excellent interpersonal skills
  - Communicating
  - Soliciting input
  - Listening
- Clear understanding of one's role
  - Have the discussion up front
  - Revisit on a regular basis (i.e. "ask for directions", don't keep driving)
  - Check with others on team and functional areas to see if they are clear
- Excellent leadership and management skills
  - Situational leadership of great value
  - High level of confidence in co-lead's value and skills
  - Good understanding of advocate role vs. objective expert role
  - Willingness to work as a leadership team and appear so at (almost) all times
- Willingness to act as mentor; willingness to act as student





## Conclusions

### Is it Dual Leadership or Duel Leadership?

- Strive for dual and work to define and resolve issues before it becomes a duel.
- Probability of conflict at leadership level is obviously higher with two co-leads rather than a single leader.
- Values of co-leadership as defined need to be weighed against potential risks, current state of corporate resources and expertise, and needs of projects in portfolio

Post-meeting questions: [joe\\_carlino@chiron.com](mailto:joe_carlino@chiron.com)



DIA 40<sup>th</sup> Annual Meeting

---

# **Project Management Schizophrenia: Balancing the Roles of the Leader and Manager**

## **Panel Discussion and Q&A**

---

June 14<sup>th</sup>, 2004

# Successful Projects Require Both Leadership & Management

"A good leader knows when to manage, a good manager knows when to lead"

## Project Leader

- **Key communicator-project goals, progress against goals, and results**
  - Updates and reassurance to stakeholders, oversight committees & partners as appropriate
  - Solicit & maintain support – represent project internally and externally
- **Lead for strategy and project integration externally and internally**
  - Oversight committees
  - Team members
  - Functional heads
  - Internal and external stakeholders
- **Lead quality decision-making**
  - Accountable for quality of decisions
  - Insures functional integration and alignment into Development plan that maximizes project success
  - Holds team members and functional heads accountable for planning and execution of functional deliverables.

## Project Manager

- **Own overall project plan**
  - Create overall project plan and timeline, integrate functional plans and deliverables.
  - Maintain accurate budget and schedule, identify gaps that would result in missed project performance metrics
  - Ensure functional plan on-time delivery and execution
- **Manage project processes**
  - Project Planning/Tracking
  - Budget planning and performance
    - » Planning and Tracking
    - » Interfacing with Finance
  - Team effectiveness
    - » Meeting Facilitation
    - » Team Communication/ Manage Follow-up
    - » Gap planning
      - Surface gaps and insure remediation
- **Manage support interfaces**
  - Insure integration of publication, patent and external request committees