Shackleton Case Study

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Shackleton the Boy Who Would Become a Leader

Of English heritage, Ernest Shackleton was a young boy of 16 years when he convinced his father to allow him to go to sea for the first time. His first position was as “Boy” scrubbing decks and polishing brass rails, but his love of the sea and the lore of the polar expeditions would be forever in his veins. While young Shackleton irritated some, he was liked by most and quickly rose through the ranks of the merchant marine. By the time he reached the age of 24, he was a full master which meant he could command a commercial vessel.

He was not known for setting himself above others or those of rank, he would not ask someone to do something he himself would not do. In 1907 Shackleton and his crew set out to reach the South Pole, although they fell short by less than 100 miles. As a result of Shackleton’s efforts they returned home without losing any lives. This made him a hero of his seafaring peers and foreign competitors alike, and earned him a knighthood upon his return to Britain in 1909. It is quite possible then that it is his leadership qualities, mishaps, and shear survival skills that intrigue those who wish to know what makes a leader. Thus an evaluation of “Shackleton” once a boy now a leader of men will be discussed in the following paragraphs.

Evaluating Shackleton as a Leader

So why do we study this man named Ernest Shackleton? It is only by evaluating what made him an exceptional leader that we learn. The discussion in this paragraph and those that follow will speak at times and to various lengths on the strengths, weaknesses, opportunities, and threats in relation to Shackleton, the Trans-Antarctic expedition, and his command of the ship Endurance. This would be Shackleton’s third polar expedition, but only his second as a leader.

To begin the evaluation process a determination on how the Endurance expedition should be analyzed is to be decided. As an entrepreneurial venture the expedition should be evaluated
by the fact that Shackleton wanted to be the first at something as his thirst for the sea and polar expeditions fueled his drive to lead and have his name in the annuals of history books. As the Norwegian explorer Roald Amundsen had finally won the race to the South Pole.

Of note, the context in which the *Endurance* expedition should be analyzed depends on what area is to be seen as a success or failure. As a scientific endeavor, the expedition was a failure because the crew did not accomplish what it set out to do. As an entrepreneurial venture, the *Endurance* was a success because Shackleton was able to gather enough to fund the ship and all supplies necessary. Shackleton made it apparent early in his career that he wanted to be a leader and “make a name for himself.” He successfully led his crew and every member survived extraordinary conditions. Shackleton was such a successful leader that many of his crewmen were willing to follow him in future endeavors despite the failure of the *Endurance*. The criterion used to evaluate this expedition again depends on whether the successes or failures are being evaluated.

Using the definition, was Earnest Shackleton an entrepreneur? Shackleton truly personified the definition of entrepreneurship as he had no resources and tons of expenses and was able to network to get the necessary buy in for his voyage. Shackleton was a true leader as he was charismatic and had a way of leading others. His shared vision and mission enabled him to communicate the urgency of his voyage to his team and others thus accomplishing total buy in. As he listened to their passions, he was able to twist things to fit his needs to gain everyone’s buy in. It also helped that Shackleton was definitely relentless when he was gathering funds. He was able to gather necessary funds despite the weak reputation he gained from the *Discovery* and the fact that nations were preparing for war. Shackleton was a leader because he was able to lead his entire crew through treacherous conditions and back to safety against all odds.
The key features of context in which Shackleton operated can be seen as he led by being a part of the team. He wouldn’t ask his crewmen to do anything that he wouldn’t do himself. For example, taking watch, or swabbing the deck. He believed that to lead by example he needed to do what everyone else did. Through past experience, Shackleton operated with skill and knowledge. His leading by example was crucial in his ability to resolve conflicts among his crew. Shackleton kept close interpersonal relationships with each of his crew members while still maintaining his leadership role. This was apparent through the name “Boss” given to him by his crew.

In Shackleton’s case, the role of fame and charisma are thought to be in play. It is noted that he would stop at nothing to get to where he needed to be to attain the entrepreneurship. Fame plays a large role in the entrepreneurial world. This is how respect is gained. Reputation proved to be a hurdle for Shackleton as having no reputation is just as bad as having a bad reputation. People were leery to fund an operation for someone that they had never heard of. Charisma on the other hand allows everyone to buy into you and support you. For example, he could have sold ice to the Eskimos. Charisma is also important. Shackleton also learned early in his career that being liked would get him what he wanted. Attitude is everything.

Some may ask was Shackleton an audacious entrepreneur/leader? Before properly answering this question we must identify and define the words stated in the question. An audacious person is someone who is very confident. An audacious person’s confidence may be shocking to others. An entrepreneur is usually a person that has started a business and is willing to take a loss. Lastly, a leader is a person that leads. Shackleton was an audacious entrepreneur/leader. At a very young age, Shackleton proved to be an audacious person. He appeared to have planned out his expedition and worked very hard to make sure he was ready.
He showed people what he could do. This is important as a leader. It is hard to follow someone who is not confident in his or her own work or decisions. If a leader is not careful being too audacious could have a negative impact.

So how did Shackleton conceive of this expedition? As the result of Roald Amundsen arriving at the South Pole before anyone else, Sir Shackleton knew he had to go big or go home. He would need to be successful in his entrepreneurship and succeed at being the first to cross the Antarctic and get his name in the books of science and history. He had the confidence, knowledge and awareness. He had a mission and vision. At stake were his name and reputation, the lives of all his crew and the morale of the community and country. He also had the buy in and respect of powerful followers who financed this voyage and had belief in his mission and vision to complete this voyage.

The evaluation of the timing is based on the events of the eve of his planned polar voyage, the *Endurance*. As a result, Sir Shackleton’s timing was poor due to various reasons; Britain was beginning war and every man and ship was needed. Also, by the time he reached the South Georgia port, he was notified of how awful the ice floes and obstacles were, as no seamen in the area recalled the ice floes this far north in their life time. He chose to wait for a month thinking the ice floes would clear. The ice floes did not clear, and he was advised by local seamen to postpone his expedition. He instead pushed forward.

Some might ask why the hurry after Churchill had given Sir Shackleton the go-ahead. This is no surprise as he was at that point he was driven by his ego and desires to be first at all costs. He wanted to be the one. He had to be ahead of the competition game and complete the mission and stroke his ego thus speed was essential. It is to be noted here that we think that he was just overly excited. At the beginning, he was so wrapped up with funding and expense, once
he had those resources he was ready to go. To us it was a little fast, but this is a mistake many leaders do. Rushing into ideas or plans once the majority of people agree with you is not always the right thing to do. Taking time to carefully plan is very important no matter how eager a leader may be.

**Evaluating Shackleton’s Effectiveness and Success**

It has been asked if Sir Shackleton was effective. Before properly answering this question we must define the word effectiveness stated in the question. Effectiveness – degree to which something is successful in producing a desired result; success. As a result, it is noted that Sir Shackleton was not successful in his Trans-Antarctic expedition; therefore, he would not be considered effective. However, he did manage to keep everyone alive.

The importunateness of fame and the evaluation of Shackleton’s potential success are relevant to the events that unfolded during the pursuit of the Trans-Antarctic conquest. Very early on Shackleton had stated he wanted to make a name for himself. The fact he made it a point to retrieve records of the expedition such as photographs and film were an indication of his quest for fame. His desire to succeed played a role in his determination but almost to a fault. He was so anxious to be the first he did not care what the cost was when he first started. However, once the journey started he did care about his team and that should be taken into consideration when evaluating his success.

What then were the underlying causes of the *Endurance* crisis? Some major issues encountered were the unusual freeze and ice floe so far north for that time of year. Also, Sir Shackleton’s timing and lack of respect for others opinions. The mission needed to be perfect from beginning to end in every way in order to succeed. There were many factors that attributed to the *Endurance* crisis, the odds were against them to begin with, in that much of this route was
uncharted territories that had previously not been explore. It would be interesting to consider the fact that the *Endurance* ship had a large and overweight stern which could be an underlying factor as it wasn’t the appropriate ship for that type of expedition. However, it was the best vessel available at that time. It may be that Shackleton did not fully grasp the ships disadvantage in consideration of all the hazards that were ahead of them in this voyage.

How important to Shackleton’s effectiveness, to entrepreneurial/leadership and effectiveness in general is the ability to change course midstream? Any good leader should be able to make important decisions when faced with unanticipated challenges. We feel it was essential for Sir Shackleton to be able to change course mid-stream and was of the utmost importance to complete the entrepreneurial journey. It is to be noted that on more than one occasion Sir Shackleton did in fact change course and direction and not only at sea. For example once he gave the order to abandon ship, he let go of the Trans-Antarctic expedition goal and turned to ensuring his team survived on the ice pack.

How does Shackleton balance out on the scale; a good leader or a good manager? Part of the expedition that was led by Shackleton was overlooked by the fact he wanted the notoriety for carrying out “the last big thing to be done in the south.” Overall, Shackleton was an exceptional leader and as a leader, he managed to bring his crew members all home alive. We believe that his crew would have quit trying if it was not for Shackleton’s team values, morals and charisma. We believe Shackleton made a lot of poor decisions before he ever left that could have really backfired but he somehow managed to make it work through his great leadership skills in the face of all adversity. For example, taking the dogs without a trainer seemed senseless, but as it turned out, it gave the crew something to do while they were stranded on the ice for so long. We think had he paid more caution to the fact that ice floes were the biggest they had ever been and
postponed the trip a year he might have been successful in the expedition. But he was so anxious to be the “first” and did not want to be outdone. Despite some poor choices, he was an exceptional and phenomenal leader. Also, a manager would have been reporting to someone else and Shackleton was not.

**Evaluating Shackleton: Effectiveness and Success**

It has been asked just what parallels are seen between Shackleton and other entrepreneurs and leaders, as well as what were Shackleton’s strengths and weaknesses? It is believed that one of Shackleton’s many strengths was that he understood the importance of morale on the success of an endeavor and with his crew members. Sir Shackleton also showed a personal interest in the people in his party by personally choosing them for who they were and not on their skills alone. With his ability and their assets he was able to focus their attention on the task. Shackleton’s physical condition was one of his weaknesses that he was able to overcome.

His reputation among the British elite was another weakness that put his party at risk and caused the delay in sending out a rescue mission once he reached the South Georgia Island. Technology appears to be another weakness that could have affected the expedition. Strength was all of the tools and resources he had acquired for the expedition. However, the weakness was the lack of knowledge and research to effectively use the resources that he had acquired for this expedition. In parallel, Shackleton did not heed warnings of people who knew the area. Other leaders have similar issues some consider this being stubborn. (Strength) Great leaders have this ability to be overconfident to a fault. They would never have reached the level of greatness if they doubted their ability every time someone told them something couldn’t be done.
Why so much interest in Ernest Shackleton, since the late to mid 1990s there have been movies, exhibits, books, and other projects on this leader in relation to business and general interest. It could be and more than likely the story of Shackleton shows how it is possible to be a good leader and overcome what appears to be an impossible situation. For example the man led 22 men to safety by living on floating ice for 2 years. He marched tirelessly over mountains of ice to survive without sleep for 3 days. The story also shows important leadership principles in action which is why people are so interested today when they are seeking to become an exceptional leader. After all he was able to overcome adversity in every direction. The man was a marvel.

**What did you personally learn from the case, from your Reach Higher experience?**

**Johnny** - The measure of a man is what he does when faced with adversity. Demand unwavering loyalty by being the example that all men strive to be. Others can lose their heads in chaos or crisis but a leader keeps his head and is able to find a solution when none exist. The ReachHigher experience has shown me that motivation is not always attached to a dollar sign. By getting this second chance to reach higher I received the help I needed to find the goals and happiness that I was missing. The effort of students and professors combined with my willingness to learn has helped change my life.

**Bethanie** - I have learned that it is possible to see the light through all extenuating circumstances and hard situations through keeping sight of your goals and staying positive and determined till the end, while at the same time keeping all losses to a minimum. I have also learned that in the face of all hardships that the expedition experienced they did not lose a single person through perseverance and incredible leadership. Through the Reach Higher, experience I have learned that all things are possible if you set your mind to it and not give up on your goals and dreams.
through determination, perseverance and belief in self and others you can achieve all things.

Remember “If you can dream it, you can do it.”

**Vernon** - I have learned that you can make a bad decision as a leader but if you are leading through charisma and team building you can overcome a bad managerial decision. I have learned from Reach Higher after 37 years since high school that I can do all things and have succeeded at learning how to become a leader. It has instilled in me that leaders are not born. By using my tools that have been earned through the Reach Higher program, I too can become the leader I desire to be.

**Ashly** – A leader comes in many forms. Leaders are recognized by different names and different actions but they all have the same qualities. In the beginning of this program I was a lump of clay and each class I took and each leadership quality I learned gave me shape and made me who I am today. There are so many aspects of leadership and I feel with the tools I have been given that I can make a difference as a leader in my home and my job.
Reference

http://harvardbusinessonline.hbsp.harvard.edu/b01/en/common/item_detail.jhtml?id=803127&referal=8636&_requestid=42244