ERNEST SHACKLETON
AND THE ENDURANCE

Jessica Weatherby, Michael Dial, Greg Lewis
Evaluating Shackleton as a Leader

1. In what context should the Endurance expedition be analyzed? As a scientific endeavor? An entrepreneurial venture? An exercise in imperial opportunity? By what criteria should the expedition be evaluated? Why?

   The expedition can be analyzed in imperial, scientific, and entrepreneurial contexts. Shackleton’s journalist friends promoted the expedition as a way to reclaim British prestige and show British courage. Shackleton hired scientists for the expedition. Shackleton raised funds to pursue his venture, like an entrepreneur.

2. A managerial scholar has defined entrepreneurship as the “relentless pursuit of opportunity without regard to resources currently controlled.” Using this definition, was Ernest Shackleton an entrepreneur? A leader? If so, why? If not, why not?

   Shackleton was both an entrepreneur and a leader. He had to seek out opportunities to gain resources. The resources needed changed when crisis called for different resources. He lead the group through the crisis.

3. What were the key features of the context in which he operated?

   During the voyage, the context changed from leading the expedition through the planned steps to leading the expedition through a crisis.

4. What role does fame play in entrepreneurial agency? What role does charisma play?

   The people involved in the venture may desire the fame that comes with a successful venture. Shackleton used his charisma to convince people to support and/or join his venture.
5. Was Shackleton an audacious entrepreneur/leader? How important is audacity in understanding leadership action?

Yes, Shackleton was audacious and willing to take huge risks in both his goal to cross Antarctica and goal to save his group. Understanding audacity is important because leaders need to be capable of analyzing, taking, and managing risks.

6. How did Shackleton conceive of this expedition? What was at stake for him in putting the enterprise together?

After Norway beat Britain to the South Pole, Shackleton conceived the expedition as the next step in polar exploration. Shackleton’s fame and reputation were at stake. Shackleton’s life, as well as the lives of his men, was at stake.

7. How do you evaluate Shackleton’s timing once he had marshaled the necessary resources?

I think Shackleton showed poor timing. South Georgia island seamen warned him ice floes were the furthest north in living memory, and recommended postponing the expedition to the following year. The ice did not change in the month Shackleton waited, yet the *Endurance* still departed.

8. Why does he appear to have been in such a hurry once the expedition was ready to set sail and Churchill had given him the go-ahead? Does this speed matter?

Shackleton might have been worried about outrunning the rumors of his bad credit and his brother’s criminal activities. A slow journey could add more costs and lead to morale issues.
9. Was Shackleton effective?
Shackleton was effective on many levels. The first thing that he was effective at was convincing people to join an expedition that would last years, had a big chance they might not even survive, and to do it for little pay. Then, he was effective in convincing people to fund this expedition.
When it came to the actual expedition, he was effective in managing his workers and keeping their energies focused in a positive direction. He then was effective in personnel and material management during the crisis. Lastly, he demonstrated effectiveness when planning and coordinating the rescue efforts.

10. How important is the quest for fame? Does that matter in evaluating Shackleton’s success?
The importance of fame varies from person to person. To some, fame might be the only motivator. For others, it might not work at all. In this case, fame is ultimately irrelevant in evaluating Shackleton’s success. While he did not succeed in his initial quest, he did succeed in many other areas, such as inspiring his men, rationing supplies, and executing the rescue mission.
11. What were the underlying causes of the Endurance crisis?

The underlying causes of the Endurance crisis was the unknown nature of ice floes for the Antarctic. This, coupled with ship construction of the day, conspired to trap the Endurance in the ice and strand the men upon it. Perhaps, Shackleton’s desire to complete the mission quickly was a cause as well….this perhaps clouded his judgment and caused him to make poor choices.

12. How important—to Shackleton’s effectiveness, to entrepreneurial/leadership effectiveness in general—is the ability to change course midstream?

The ability to alter the course of action in any part of a plan is critical for any leader or manager. There are many unknowns that can interfere with the best-laid and executed plans, and these unknowns must be dealt with in order to achieve the end goal.

13. On balance, was Shackleton a good leader or a good manager?

Shackleton was both a good leader and manager. Here, he showed leadership by inspiring his men to overcome great obstacles that were near impossible. He was also a good manager because he had limited resources and utilized those resources so that his men were able to survive harsh conditions. In business, (and life) the ability to seamlessly integrate managerial and leadership skills is essential to becoming an effective leader that people want to follow, not have, to follow.
The Crew
14. What parallels do you see between Shackleton and other entrepreneurs or leaders whom you have studied? What were Shackleton’s strengths and weaknesses?

Ernest Shackleton shares many common traits with other successful leaders. He was highly motivated, passionate, and courageous. He was excellent at fund raising, a very important part of politics and leadership. He raised what would equate to 4.5 million dollars for Endurance and his voyage. A specific fund raising technique was selling shares of the profits from photos taken, very forward thinking. He was smart enough to calculate risk, creative enough to form a vision, and found ways to get others to buy into his vision.

He had an amazing ability to perform under stress, a calm poise. Stating he was able to overcome obstacles may be the greatest understatement of all time. He was also good at communicating with his peers and subordinates. Although, there was a portion of the case that suggests he was not good at allowing his subordinates to ‘vent’ to him. Wild, Shackleton’s second in command, would handle the human relations. “Wild’s approachability and overall geniality helped Shackleton to preserve some distance from the crew and maintain an aura of authority” (p. 9).

Regarding hiring, Shackleton valued character over skills. “Their science or seamanship weighed little against what kind of chaps they were” (p. 8). He sought optimist, cheerfulness, perseverance, and a good sense of humor. Shackleton was very aware of how important morale was in achieving success. Throughout the case study, Shackleton made the necessary changes and effort to encourage optimism and boost his subordinate’s spirits. Morale truly is critical.
Shackleton displayed humility, a key leadership trait. “Despite rapid advancement, Shackleton developed a reputation for not flaunting his rank over the regular sailors” (p. 2).

Another major strength for Shackleton was his concern for others. He always put his men and country first.

Finding a specific leader or entrepreneur that parallels Shackleton well is impossible. Regarding drive and ambition to succeed, Shackleton can be paralleled by former Enron leaders Jeffery Skilling and Kenneth Lay. T. Boone Pickens is a good analogy in regards to forward thinking. Colin Powell parallels Shackleton in humility and ability to compel loyalty. James Madison is another good comparison in regards to forward thinking and politicking. Militant leaders such as George Washington, Colin Powell, and Paul Van Riper parallel Shackleton regarding courage.

Another potential weakness for Shackleton is a strength as well. His drive and ambition surely contributed to his deadly heart attack at 47. He probably did not take care of himself since he was so altruistic, which may have also contributed to such a young death. Although, considering healthcare aboard a ship in the early 1900’s, these factors could be off base.
15. Why are people today so interested in Ernest Shackleton? Since the mid-to-late 1990’s, why have there been so many books (business/general interest), movies, exhibits, and other projects about Shackleton?

His leadership is unsurpassed today, over 100 years after his famous voyage. Jim Collins, John Maxwell, and Steven Covey are just getting the importance of these leadership traits to the general public. Why has it taken us so long to realize the importance of hiring someone that is optimistic over someone that is more skillful, or how important morale is within a department or facility?

I think Shackleton is so fascinating today because he must have known something the majority of leaders between then and now did not. What, exactly, were his traits that allowed him to do so well under such pressure? These answers are difficult to pinpoint. Shackleton and other great leaders help us understand exactly what real leadership should be.
16. What did you personally learn from the case? From your reach higher experience?

Personally, this case motivated me. At this point in my professional and academic career I am on the border of overwhelmed. I don’t think I have ‘cracked’ yet but I sure have felt close. How close did Shackleton feel? How did he maintain his poise in these situations? It really is an amazing story. I imagine there is a reason we are reading this remarkable story of leadership in our capstone. Shackleton really did exemplify all the traits of great leadership that we have learned about in this program. I would say that Shackleton conquered Jim Collins’ level 5 leadership and reached a level of his own. Now, in my eyes, there are levels 1 through 5 then Shackleton.

Also on a personal note, I have learned that I do not want to be a manager but I do want to be a leader. I have learned quite a bit about management in this program and it is not for me. But I have also learned what to look for if I am in a position to choose my manager.
The End...or Opportunity in Disguise?