Case Study of Leadership in Crisis:

Ernest Shackleton and the Epic Voyage of the Endurance

Capstone - ORGL 4553

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Isolating the Problem

The endurance expedition was Shackleton’s third Antarctic attempt. Shackleton began with little to no experience on frozen landscapes and ice. Shackleton set out with determination and drive to race for the South Pole. Like most leader Shackleton had the vision and purpose to carry out his dream. He was a man with a mission and vision to reach the South Pole. The South Pole expedition led by Shackleton required extensive funding. This would be a task because the British were preparing for World War I. However Shackleton used his creativity and had the heart of a determined entrepreneur. He hired a photographer and sold shares of whatever photos might be taken of the Antarctic journey and of any publications that might result. He established friendships with members of different societies and with Shackleton’s persistence money came in for his exploration. The next step for Shackleton was to find two ships, establish a crew and accumulate proper supplies for the expedition.

Shackleton had in mind what he wanted for his ship. He wanted a darkroom for a photographer and berths for sled dogs. A public announcement was sent and there were over 5,000 applicants. Shackleton divided the candidates into categories of “mad”, “hopeless” and “possible.” He met with those in the “possible” category and relied mainly on instinct for judging the character of each man. Shackleton wanted men with qualities the he associated with optimism. He gave preference to those who had experience on fishing trawlers because those men were accustomed to working long hours on frozen, windswept decks and believed they would be able to handle the harsh conditions of the Antarctic. Soon Shackleton had his crew, ships and supplies and was ready to set sail. However the expeditions most important hire did not even interview for the job and was assigned second in command.
This task would be tremendously dangerous as the weather would prove to not cooperate and supplies limited. There was no margin for error for this would affect the efficiently of the expedition. The man we plagued with harsh storms, illnesses, and disagreements. But to no person’s dismay this would not stop Shackleton. Furthermore, the trip relied heavily on sled dogs and skies, both being an area in which Shackleton was not highly skilled. But Shackleton aimed to lead the first ever overland crossing of Antarctica. Some of his friends considered this to dangerous and declined the offer to join. However Shackleton had convinced himself that the expedition was indispensable to the nation. Shackleton was warned that ice floes were the farthest north that they has ever been seen, when he was in South Georgia and advised that he should postpone his trip until the following year. But amongst weather conditions was Shackleton’s pride.

Shackleton’s ability to lead and leave out his pride proved to be a task in itself. He insisted on sailing out of South Georgia Island, he could have waited it out and not encountered the ice floes that the whalers at South Georgia predicted were coming. It wasn’t until endurance went under that he would even consider the input from other members on the ship or begin thinking more about survival than his dream to “make a name for him and his wife.” He seem so consumed with the task that he was close mined to advice and he acted invincible. Another problem with the journey was Shackleton’s hiring. He make his second in command a hire that he never interview and this only proved to be a mistake after seeing that he couldn’t carry of the task of keeping conduct on the crew. Shackleton made a bad evaluation of the condition he would journey into even after he was warned numerous times. It would appear that he took no heed to his warning and felt that he knew best. However, His stubbornness is the reason that ship was taking out by ice floes.
It’s hard to say Shackleton lacked leading abilities because in many ways he had the traits of leadership. He organized and plan out every detail. He made sure he would have the materials needed to make the journey and got the best of the best for his guys. He appeared to remain neutral with his crew. He kept up his position and was respected as a leader for treating the other members with respect and never acting better than anyone on board. Because he was an effective leader and had the ability to motivate it pushed people.

Shackleton was passionate about what he set out to do and was able to get other on board of was appeared to be a daunting task. His was crazy mad about heading South and conditions would not be enough to stop him. In today’s society it would appear he was a great leader with drive and determination. However, when isolating the problem it’s safe to say that he had too much pride in himself. He knew he set out for a dangerous task, but his sense of pride was so strong that he could not rationally out way the cost. Had he thought it through, it would have made sense to wait for the next year when the ice floes settled. He simply had an ego issue in leadership. He did everything right in so many ways. He put so much planning into the voyage, but he never planned for the fact that ship could possibly be taken out by ice floes. Also when he hired he didn’t hire based on skill, but more so on personal preference. This didn’t seem too much trouble however, it would be effective leadership in today’s terms. Shackleton didn’t explore all options when setting sail. He didn’t explore the option of not making it, because to him that was not an option. And while I admire his dedication and determination to follow his heart, I can say that in leadership its best to explore all your options, even failure.
### Analyze and Evaluate Alternatives

#### SWOT (Strengths, Weaknesses, Opportunities, Threats)

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When Shackleton reached South Georgia Island on the way to the Antarctic, there were already indications that the expedition would be at risk. The case states “… local seamen warned that his ship might get trapped…”, and yet Shackleton decided to proceed. Putting off the expedition would threaten financial and personnel arrangements Shackleton had already made, not to mention ruin the reputation he had built for himself. People were expecting him to succeed in this expedition and he couldn’t let them down. But Shackleton wasn’t in such a hurry to pass records set by other countries, he would have had better success. Slow and steady is the key in preparation. It takes years of planning for expeditions even today, such as space explorations.

Securing the funding for the expedition had already taken a long time. His supporters were wealthy British industrialists. The fact that they were expected to embark on the expedition
while the country made preparations for war indicated patience was not there for delaying the journey.

Shackleton had already arranged for the logistics and personnel to make the journey. On one hand, an interruption at South Georgia Island would mean the men and sled dogs would be idle. The men would expect reimbursement for that time and this would put strain on the already limited finances for the expedition. On the other hand, this time would have benefitted the crew and leaders by giving them more time to get to know each other and discuss their thoughts and reservations about the expedition.

Shackleton had the option to use an alternate route when they came upon the Dawson-Lambton Glacier. Since the ship had already struggled with ice floes and had almost sunk once, choosing to land here would reduce the risk of the pack ice trapping the ship. Instead, Shackleton chose to avoid adding 200 miles to the route. This is where the flexibility Shackleton once displayed stranded could have benefitted the expedition.

The case does not tell us what happened to the Aurora and her crew on the other side of the Antarctic. Knowing the outcome of their expedition would have helped in analyzing this case. Shackleton did not have a way to know if he and his group had made it to the other side of the continent, if the supplies would be there to sustain them for that half of the trip.

One might wonder why the case states that the Endurance was within sight of land when it became stuck in the ice, they did not leave the ship and move to land. The map in exhibit 1 and the case narrative provides some answer. The land the Endurance was in sight of was 80 miles away. Disembarking here meant traversing 80 miles of ice, and at this point, there was still some expectation that the Endurance would be free of the ice. From the narrative, it appears a
wait was expected, and the initial situation was not dire enough to be a concern. Even if they had chosen to leave the Endurance at this early stage, there was no guarantee that they would have survived an eighty mile journey through the floes.

Formulating a Solid Evaluation

Shackleton being a man of experience, character and leadership surely evaluate the risks that a team on a polar expedition would face in the event there was a turn for the worse. I could only imagine Shackleton weighing out the pros and cons and making the best decision to be successful and keep his crew out of harm’s way. He had Shackleton possessed many qualities of great leaders.

Influential:

“We would have gone anywhere without question just on his order.”

Charismatic:

“He would get into conversation and talk to you in an intimate sort of way, asking you little things about yourself—how you were getting on, how you liked it, what particular side of the work you were enjoying most.”

Visionary:

“The discovery of the South Pole will not be the end of Antarctic exploration. The next work [is] a transcontinental journey from sea to sea, crossing the Pole.” (p. 21) “I have had some hard knocks,” he wrote to a patron, “but I let the past rest, and am now looking forward to carrying out the last big thing to be done in the South.” (p. 22)

Confidence:

In a letter to his wife, Shackleton reassured himself that the expedition was indispensable to the nation: “there are hundreds of thousands of young men who could go to the war and there are not any I think who could do my job.”, “unshakable confidence in the other’s ability to survive the most difficult mental and physical trials.” (p. 4)
Passion:
“The conclusion was forced upon me that a boat journey in search of relief was necessary and must not be delayed.”

Perseverance:
“…closest pass, only to discover after scaling it that there was no way down on the other side and no access to the neighboring pass—there was nothing to do but descend the same path they had come on.129 They repeated this process at the second pass. …They began the uphill climb to the third pass, which by late afternoon. They had been climbing for 13 hours and were utterly exhausted, but Shackleton sensed that Worsley and Crean would persevere as long as he himself kept moving and leading. …The third pass was also impossible to descend, so they made their way down again and began the climb to the fourth and last pass between the mountains. At the top of this pass, there was no time to waste with drawn-out decisions; a fog was rolling in from behind and they needed to reach a lower altitude before nightfall, or they were certain to die in the cold.” (p. 130)

Empowering:
Shackleton empowered Wild, second in command and most trusted mate, became, as Macklin put it, a “sort of foreman.” “When we wanted things,” the doctor recalled, “instead of going to Shackleton we went to Wild.” (p. 46)

The Boss divided the men into three groups; he would command the James Caird, and he appointed Worsley to lead the Dudley Docker and navigator Hubert Hudson to steer the smallest boat, the Stancomb Wills. (p.94)

Ability to delegate:
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Positive Attitude:
“Shackleton’s own demeanor was essential to maintaining morale during the long stay on the boat.- That is Sir Ernest all over. “... He is always able to keep his troubles under and show a bold front. His unfailing cheeriness means a lot to a band of disappointed explorers like ourselves”

Goal orientated:
“The six men had accomplished the nearly impossible task of sailing a small open boat through 800 miles of the world’s most turbulent waters.”
"The commander had completed the most important mission of his life: he had led his men "through Hell" and every last one had survived the ordeal." (p. 145)

Innovative

"Seeing no other way to descend quickly enough to outpace the coming nightfall and falling temperatures, Shackleton announced, “It’s a devil of a risk, but we’ve got to take it. We’ll slide.” Using the coiled rope as an improvised sled, the three men braced themselves in a row and shot down the mountain, descending 1,500 feet in just minutes."

Based on the version of the story, presented in the article “Leadership in Crisis: Ernest Shackleton and the Epic Voyage of the Endurance,” the Endurance expedition should be evaluated as an entrepreneurial venture. “Shackleton would need both aristocratic patronage and scientific support. Therefore, Shackleton promotes the voyage as scientific adventure to receive acceptance from previous benefactors. These benefactors only back voyages that are for the advancement of science. Benefactors like the Royal Geographical Society (RGS) “which had a scientific credibility and political power to either raise or cripple any purposed expedition.” The RGS donates monies to Shackleton’s Imperial Trans-Antarctic Expedition, even though they complain that Shackleton is withholding information about the journey.

Despite not being forthcoming with the RGS about the details of his plans, Shackleton did make scientific head way, by working with “British Major General Wilfred Beveridge, an expert in chemical research, and together they devised the “composition cake,” a compact version of a day’s food for one man.-composition cakes developed for the Endurance crew supplied nearly 3,000 calories apiece…” The development of this food source prevented scurvy for the crew of the Endurance. The reality is that discovery was accomplished prior to leaving on the expedition. In essences the Imperial Trans-Antarctic Expedition had little or no scientific accomplishments, since the science crew from the Endurance didn’t reach the South Pole.
Shackleton gained the blessing of the RGS. By doing so, Shackleton is granted political access and is able to influence the British Government that this journey will put Great Brittan back in the forefront of exploration. The expedition would allow them to capture the notoriety of leading the civilized nations on “The Race to the South Pole.” The polar victory that had eluded them for many years could now be regained. According to Shackleton and his friends in the press, this was the last chance to “reestablish the prestige of Great Britain in . . . Polar exploration.” Shackleton eventually received funding from the British Government. The expedition and the great rescue became more about Shackleton than British Government due to the missions failure and the First World War.

Shackleton promoted Imperial Trans-Antarctic Expedition as entrepreneurial venture. He marketed the expedition as an investment opportunity to several hundred wealth people in Great Brittan. He sold the idea to elites that he would be able to accomplish this great feat by using motor cars and horses to trek across the South Pole. Shackleton includes a prospectus with a personalized letter to each individual prospect. Shackleton behavior indicates that he was motivated by the opportunity of gaining financial wealth. He was already considered famous and heroic from previous adventures. Therefore, I evaluated the Imperial Trans-Antarctic Expedition from an entrepreneurial venture.

Shackleton was leader with all of the characteristics to be successful. Shackleton had done so up until this expedition. He had gained fame and notoriety from previous his past performance. What was different about this expedition? I don’t have enough information to compare Shackleton’s missions. So I will stick to the information as it was presented. My Overall assessment is that Shackleton was ineffective as a leader of the Imperial Trans-Antarctic
Expedition. Shackleton’s failure is contribute to poor decision making, lack of planning and dishonesty.

Beginning with the fundraising for the Imperial Trans-Antarctic Expedition, Shackleton’s decision making is inadequate. In 1901 Shackleton accompanied adventurer Robert Scott on a vessel the “Discovery” that “the Royal Geographical Society and another funder had paid £45,000 (about $5.2 million,)” here it is the end of 1913 and Shackleton working on his third fundraising for an expedition. Somewhere along the way he decided to stop raising money after he secured his minimal goal of “£51,500 (about $4.5 million today)” An amount that was slightly more than RGS paid for one custom built ship in 1901. Shackleton need to buy two ships, yet for some reason he didn’t calculate inflation, nor did he consider waiting until he secured enough money to purchase a more technological advance ship of his day. Instead he bought a used ship and named it “Endurance”. To make matters worse Shackleton purchase two vessels for what the RGS paid for the Discovery.

The Imperial Trans-Antarctic Expedition was doomed to fail the moment Shackleton decided that take on the expedition with less funds necessary to secure a ship worthy of the task. Second, Shackleton discounted the warnings from the other shipping captains. The captains expressed to Shackleton that the floes where further north than they remember seeing them in them in the past. They advised Shackleton to postponing the expedition until next year. Using poor decision making Shackleton ventured off a month later to discover that the shipping captains was accurate in their findings. That the floes where further north than had been in previous years. Instead of turning around Shackleton placed his crew in harm’s way by proceeding after confirming that the warnings had validity. Last, the decision not to move the crew and the supplies off the ship until the Endurance is tilted 30 degrees and water is flowing in
is another example of poor decision making. 5 months prior to that event Shackleton stated that the ship would last much longer, it’s only a matter months, days or hours before the sea claims her. Even with Shackleton stating this he wasn’t proactive. Instead using poor decision making by decided to wait until the ice had a violent reaction to take the ship before he reacted.

The vision that Shackleton laid out made sense. The vision was clear and concise. It was the big picture idea, the kind that stories and movies are made out of. The details were never clear and it seems as though they didn’t have a contingency plan. There were no “What if” analyses. The author only provided description organizing. I take the opinion that there wasn’t a plan of action beyond sailing two ships to two different destinations and deploying people and dogs for a 1500 mile trek across the ice, because all Shackleton actions are reaction leading up to the failure of the mission. Shackleton mission changed and he became successful for surviving and his rescuing 22 stranded members of his crew.

One of the leadership characteristics that Shackleton lacked was Honesty. This character flaw would deem catastrophic to the expedition. Shackleton failed to be honest with himself, his crew and the benefactors. Not being honest with himself proved to be the most damaging to the expedition. It wasn’t until the he accepted the fact that the ship was lost and the journey would not have the large financial pay off that he was originally motivated by. Shackleton wasn’t honest with himself as to how much funding he needed to be successful. He stated later that he had regrets on purchasing the “Endurance” a ship that was outdated and not built for the harsh polar expedition that Shackleton was going to put it through. Shackleton was not honest with the RGS, as he provided little detail of the expedition and left them desiring more knowledge about his plan. Speculating, if he had provided more information, then he may have received more funding. Plus Shackleton wasn’t upfront about his methods to achieve success with the
benefactors. He said that he would use motor cars and horses instead of dogs, yet he probably never considered any alternative other than dogs as a viable resource for crossing the ice. He was just saying anything to get their money. Nor was Shackleton honest with his crew. He didn’t disclose the information that the shipping captains shared with them. Neither did he tell them to prepare to abandon ship when he knew it was only a matter of time.

Shackleton was not effective on the Imperial Trans-Antarctic Expedition, was a failure because of poor decision making, lack of planning and lack honesty. Shackleton was successful at surviving and rescuing majority of his crew.

Making Recommendations:

Firstly, Shackleton needed a better plan of action for the expedition. The best place to start after securing the necessary funding, and supplies would be to shore up the areas that need attention and improvement, such as the crew’s and his own dog sledding capabilities. Living near to the Arctic Circle, there was sure to be various locations in which to practice and become familiar with working with dog teams for polar travel. In addition to this, Shackleton needed to meet with the hired dog trainer well in advance of his departure for Buenos Aires. The relationship he had with this trainer needed to be more firm. Shackleton also would have benefited from making some test runs in the chartered territories of the Arctic with his crew in order to better prepare them for the journey ahead of them in the South.

Shackleton made a grave mistake by not having an adequate rescue plan in place. A standby rescue team, and time line for deployment were critical to improving the odds of the Endurance expedition’s survival. A rescue effort could have easily been setup at South Georgia, being strategically placed to provide aid early on in the event of an emergency. This strategy
could have helped cut Shackleton’s losses greatly concerning the health of his crew, and the sheer quantity of supplies that were depleted during their desperate struggle to survive.

Finally, Shackleton needed to postpone the expedition’s departure for the Weddell Sea until the ice floes receded, and conditions were favorable for the journey. An adequate risk calculation would have revealed odds stacked against their party’s success. The danger of fatality far outweighed the margin for success. Shackleton needed to seek counsel with the local whalers in the area, and should have reevaluated heading to sea later in the summer. This strategy would have kept Shackleton and his crew from the unnecessary risks that they were ultimately exposed to while in the Weddell Sea. The mission that the expedition had attempted may have been successful to completion otherwise.

Agenda of Corrective Actions:

1. Charter a dog sled and cross-country ski training program for all crew members.
2. Bring dog trainer on-board as a permanent crew member prior to departure, and delegate training program to the trainer.
3. Train dog sled team in pulling supply-laden sledges prior to departure.
4. Consult experts in wilderness and polar rescue strategies, and incorporate this into the training in polar conditions for all crew members.
5. Prepare logistical rescue plan; crew, ship, supplies, and timeline in advance for deployment from South Georgia.
6. Prepare for possible over-lay due to adverse weather conditions: extra supplies, and provisions for an extended stay at South Georgia, for example.
7. Include in expedition plans a back-up schedule of deployment of (x) number of months, or final deadline before having to scrap the mission.
Reference
