



When Bad Things Happen to Good Teams

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X-Teams:

How to Build Teams That Lead, Innovate, and Succeed

BY

Deborah Ancona and Henrik Bresman

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INTRODUCTION

When Bad Things Happen to Good Teams

PAUL DAVIDSON had just received permission to work with his team of three engineers on the second version of a software product that promised exciting things for the company.¹ The teammates brought in ten more engineers and vowed that this time they would get to include all the features that they thought customers wanted. Paul had just finished a course in continuous improvement and was anxious to apply his new knowledge. This team would meet its deadlines and learn along the way. After working hard to get an elegant design and prototype, the team put together an overall plan, identifying all the tasks and setting achievable delivery dates. The team members committed to the schedule, agreed on a clear set of goals, and moved into full-scale implementation. Excitement was high. The team knew what it wanted to build and hoped to show top management just how well it could deliver on those specs.

Then, a few months into the schedule, an upper-level manager suggested that the product be changed to meet some needs that customers had raised. Somehow these needs had not been considered by Paul and

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his team. In this market-driven organization, managers and customers met often. After a very intense user convention, customers had pointed out some features that they thought were essential—and management wanted to show its support of this process. Paul was reluctant to make the changes, saying that the team members were committed to the schedule and they didn't want to do anything to jeopardize meeting their deadlines. They were on a crusade to show that continuous improvement works, and they would meet their schedule no matter what it took. The team members saw the manager as engaging in some kind of power play; the manager felt that the team was inflexible and unresponsive.

When layoffs came, the team lost two members and resentment grew. Paul requested that more people be assigned to the project, but his request was denied. Deadlines slipped, two more team members left, morale dropped, and Paul left the company—feeling that he had no future with such an inhospitable organization. None of the other three original engineers wanted to fill the void, and the team just kept getting further and further behind—while they all circulated their résumés.

How did a team that started off with so much talent and enthusiasm end up failing? Here was a team that considered customer needs and strove for efficiency. Here was a set of people who worked well together, committed to a plan, and were very motivated to make that plan a reality. Here was a group of people who had a lot to offer this organization and wanted to work hard. They were excited and energized, and then it all fell apart for one primary reason: the team was too inwardly focused.

This diagnosis may surprise you, and indeed we will explain shortly how focused, inward-looking teams have traditionally been considered ideal, offering a recipe for success that includes close camaraderie, trust, and a solid process for working well together. But consider how in the case of this software team that inward focus caused it to build a wall between itself and the outside world. The team members came to believe that they had the answers and that anyone who disagreed with them was wrong, and perhaps even had bad motives. They became more and

more rigid in their practices and beliefs so that everything was seen with an us-versus-them mind-set. The more negative feedback they received, the more they rebelled against what the company and customers were asking of them. And so a vicious downward spiral ensued.

We have seen many teams fail, or slowly decline, just as Paul Davidson's team did. One such team in the financial services industry had a highly promising product, but because team members failed to get buy-in from division managers, they saw their product slowly starve from lack of resources. Another group in a computer company worked well as a team but did not gather important competitive information. Its product was obsolete before launch.

These stories are doubly sad because they are about good teams made up of talented, committed individuals. These are the kinds of teams led by people whom others admire and whose footprints they have tried to follow. These are teams that seem to be doing everything right—establishing roles and responsibilities, building trust among team members, defining goals—and nevertheless see their projects get axed.

Why do bad things happen to good teams? As we have already begun to explore in our analysis of Paul Davidson's team, teams often fail because their members are following the models and theories that are written up in best-selling books on team effectiveness. It is the view of team performance that we have all learned, the one that we carry in our heads, and the one that dominates executive team training—namely, that all a team needs to succeed is to focus within, on its own process, on the problem at hand, and on each other as team members. This is the mental model that guides our actions when we create teams and set their agendas. And this is the model that feels comfortable to most people who want to be part of a team in which members care about each other and want to get the job done quickly. This is the model that makes us effective at shaping the internal dynamics of teams—how to build team spirit and work around a conference table, how to make rational decisions and allocate work, how to set goals and create roles for individual members.

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The problem is that the world has changed and this model of internal focus doesn't work so well anymore. Fierce innovation-driven competition has forced dramatic changes in organizational life. As the competitive wars rage, battles are increasingly being won with the weapons of innovation, speed, and organizational linkages creating synergies that efficiently satisfy customer needs. It is organizational teams that are increasingly called on to lead these battles.

In addition, the world is plagued by complex problems like poverty, global warming, and political violence. These problems can only be addressed when people from diverse sectors like business, government, and nongovernmental organizations (NGOs) work together. It is teams that will ultimately be the major actors in carrying out this important work.

In this new world, leadership can no longer exist only at the top of the organization but must also be distributed throughout the organization and shared with teams. When innovation is king and keeping your finger on the pulse of technology and changing markets is critical, it is no longer the case that someone at the top will figure it all out and everyone else will execute. When organizations are faced with complex problems and resources are dispersed, leadership needs to be distributed across many players, both within and across organizations, up and down the hierarchy—wherever information, expertise, vision, new ways of working together, and commitment reside. Within this world of “distributed leadership” teams cannot look solely inward.² Being called to take on a new leadership role, they must become the eyes that read the changing environment, the people who bring commitment and energy to the task, the visionaries who help shape a new future, and the inventors of innovative solutions for business and world problems. Now teams must work with others to create distributed leadership in action as they innovate and create change.

Therefore, the old way of carrying out teamwork that dominates the culture, a way that is largely internally focused (as Paul Davidson's team was), is only half the story. It is the half that teaches us to be effective in

shaping the team's internal dynamics. But the other half—managing externally, across team boundaries—gets ignored. And being only half-right, the story can be very wrong. We are not talking “either/or.” What is needed is an internal focus combined with an external approach. Evidence now exists suggesting that team success at leading, innovating, and getting things done means managing both inside and outside the team.

The Other Half of the Story: X-Teams

Consider the Netgen team at Microsoft.³ This small team was formed when Tammy Savage, a manager in business strategy, realized that Microsoft didn't really know what technologies it needed to develop for thirteen- to twenty-four-year-olds (the “Netgeners,” or Internet generation). So she created the Netgen team to get to know these customers better and then to develop software to meet their needs. But selling the idea to the top brass and getting the resources to find ways to understand the Internet generation was not easy. Bill Gates was not that interested—the ideas were too vague and it was not clear what the actual product would be. The team realized it had to make some changes to both its product ideas and its pitch. By the next meeting the team had data about what features Netgeners might like and how Microsoft could benefit from this approach. While Bill Gates was still not that enthusiastic, another top manager gave the team the thumbs-up, and Tammy became a group manager.

The first thing the Netgen team did was to bring together a set of college students and ask them to work on a business plan. The team wasn't interested in the plan itself but rather in seeing how the students used technology as they worked together. After a few weeks, team members understood a lot more about how Netgeners used technology and what they wanted it to do for them. And so began the development and production of “threedegrees,” a product that would allow groups of people to do things together online, such as listening to music or creating a joint

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photo album. Microsoft gave Netgen new space and many new members. Team members got out their PDAs and contacted anyone who might be able to help or provide expertise. They borrowed lots of ideas from others but invented their own unique form of creative development. They looked at their competitors' products and kept top management informed of their progress while aligning with several management demands. They shopped for the best technologies within Microsoft and, when necessary, developed some of their own. They worked through many technical glitches and internal disagreements. And they always kept going back to the customer—the real Netgeners—to test their ideas. Then they produced the code and moved it into Microsoft Messenger, the firm's leading instant messaging application.

The Netgen team offers a case in point that sometimes a small group can create change in a large company. In the end Netgen produced innovative new software ideas and technology for the internet generation. And Tammy Savage is heading up a whole new group that focuses on learning about customer needs and integrating them into product design.

The Netgen team is what we call an “X-team.” The *X* in *X-team* underlines the point that an X-team is externally oriented, with members working outside their boundaries as well as inside them. The *X* in *X-team* emphasizes that years of research and practice have shown that while managing internally is necessary, it is managing externally that enables teams to lead, innovate, and succeed in a rapidly changing environment. An X-team differs from a traditional team in three main ways. First, to create effective goals, plans, and designs, members must go outside the team; they must have high levels of *external activity*. As Netgen did by seeking top management support and funding, spending lots of time understanding customer needs before designing its product, and looking around the organization for pockets of expertise that it could build on. X-teams seek out information about the customer (often directly as opposed to secondhand), the technology, the market, and the competition. They figure out what directions top management is moving in and work

to either change that direction or link to it. They learn from other teams and adapt to new information. They work hard to coordinate with others and get buy-in from upper levels. They have effective dialogue with many people outside the team.

Second, X-teams combine all of that productive external activity with *extreme execution* inside the team. X-teams develop internal processes that enable members to coordinate their work and execute effectively while simultaneously carrying out external activity. For example, the Netgen team had various members give presentations to top management (external activity), but then team members discussed the feedback they received about those presentations and changed them. Team members showed extreme execution in their ability to learn from their external forays and change going forward. This fine-tuned internal process is also shown in Netgen's ability to get large amounts of information about the customer and translate it into software features that customers wanted.

Third, X-teams incorporate *flexible phases*, shifting their activities over the team's lifetime. Netgen team members first engaged in *exploration*—learning about customer needs, top management expectations, and their own passions about what they wanted to create. Then they moved on to *exploitation*—actually developing the software that customers wanted and competitors did not yet have. Finally, they engaged in *exportation*—transferring their product to another part of Microsoft and learning from their experiences. As with other effective X-teams, Netgen changed its process over time to keep the product moving along and to deal with the demands that different phases of a task presented.

Together, those three elements—external activity, extreme execution, and flexible phases—form the principles by which X-teams guide themselves. But how are they able to actually carry out those principles? What kind of structure supports such teams? The answer largely lies in what we have come to call the three “X-factors.” First is *extensive ties* to useful outsiders who enable teams to go beyond their boundaries, coordinate their activities, and adapt over time. For example, Netgen made use

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of its ties to other people inside and outside the firm and developed new ties along the way. Team members found people with the expertise and information they needed, and after talking to these people, they got the names of others. Second, *expandable tiers* allow teams like Netgen to structure themselves. Tammy and a few other managers composed the core that led the team, a number of other members carried out the work, and other members dropped in for short periods to work on specific pieces of work. Finally, *exchangeable membership* allows a team like Netgen to include members who come in and out of the team and to rotate leadership.

The result is an X-team whose members frequently navigate across the team's boundary. This enables the team to get more information and to adapt quickly to new circumstances. This is an agile group of people who can bring innovation to a company and satisfaction to themselves. This kind of team also creates schedules and plans, goals and commitment, but it does so after working interactively with others to jointly define what the team will do and what the final product will be. Here excitement and satisfaction grow as the team gets positive feedback from successes in an organization that has already offered its input and support.

These new, externally oriented, adaptive X-teams have been able to make great things happen. They consistently outperform traditional teams across a wide variety of functions and industries. One such team in the oil business has done an exceptional job of disseminating information about an innovative method of oil exploration throughout the organization. X-teams in sales have brought in more revenue to a telecommunications company. Drug development X-teams have been more adept at getting external technologies into their companies. Product development X-teams in the computer industry have been more innovative—and have outperformed more traditional teams on time and budget metrics. Consulting X-teams have been better able to serve client needs.

Will every team that is internally focused fail? Should every team be an X-team? The answer is clearly no. X-teams are not needed when team

goals and organizational goals are clearly aligned and the team has the support it needs, when team members have all the information they require to get their work done and the information and knowledge they need is not changing rapidly, and when the team's task is not highly interdependent with other work within the organization.

As we've said, however, we do believe that the world has changed and that X-teams are better equipped to deal with the challenges that this new world represents than are traditional teams. Specifically, the shift from a singular reliance on command-and-control leadership to more of a distributed leadership mind-set requires additional dialogue and alignment up and down the organization.⁴ X-teams like the Netgen team work with top management to lead the organization. It was Tammy Savage and her team who realized that the Internet generation had to be better understood, who built commitment to this new way of looking at the market, who invented software to meet customer needs, and who pushed top management to have a greater focus on the voice of the customer. It was this X-team that reached out across functional, divisional, and corporate boundaries; challenged corporate assumptions; and provided software ideas and technology that helped Microsoft compete in a changing marketplace.

X-teams have emerged to help firms solve complex problems, adapt to changing conditions, innovate, and gain competitive advantage. Their entrepreneurial focus helps them in getting resources and in seeking and maintaining buy-in from stakeholders. Their links to top management, customers, competitors, and technologies enable them to link top-level strategy with knowledge and ideas from the ground. Their external focus helps them to respond more nimbly than traditional teams to the rapidly changing characteristics of work, technology, and customer demands and to more effectively link their work to other organizational initiatives.

This book is the story of X-teams. It is a story about ordinary people doing extraordinary things simply by shifting to a more external approach. These teams combine extreme execution inside with an interactive approach across the team's boundaries. These teams make use of extensive

ties outside the team and the firm and have a structure of expandable tiers that enables members to come in and out of the team, changing their roles as needed. These teams shift their activities over their lifetime as the task demands. In short, these teams are adaptive and flexible. The bulk of this book is about how the strengths of X-teams can be leveraged to orchestrate superior performance and action in an increasingly complex and changing world.

The book contains many examples of specific teams but also examines forward-looking companies that have established specific programs, incentives, and processes to create and maintain X-teams. We will examine how such programs are established, how they are structured, the checklists used to guide team member activity, and the subsequent results of these endeavors. We will focus on the full story—the integration of the internal and external approach to team management—and the organizational context needed to make it all work.

Who Should Read This Book?

Managers at all levels in any organization in which teams are important will find this book useful. From senior-level executives whose organization's performance depends on the success of its teams, to the team members in the trenches responsible for getting the job done. From those who have to create the conditions and incentives to make teams successful, to those responsible for team member training and development. From the individuals working on large, complex projects involving cutting-edge technologies and hundreds of people, to those working in small groups trying to make ongoing improvements in their work or community.

This book is intended for those people who are searching for the answers to these questions: How can firms move to more decentralized structures and become more innovative? How do we move leadership to lower levels within the firm? How do we get people who are already

overwhelmed with day-to-day work to focus on new directions for the future? How do we unleash the creativity of people who want to make a difference and create change but don't know what to do to make it happen? How do we link top-level strategy with new initiatives below? And, at the most basic level, how can we improve the performance and satisfaction in teams that form the core of today's organizations?

We also hope that this book will provide a valuable resource to academics, consultants, or anyone else struggling with the challenges of understanding and managing teams in a new organizational environment. We hope to provide a framework that will reshape some of the fundamental assumptions that permeate the world of small-group research and practice. We hope to shift the research lens from one that rests on the team's boundary and focuses inward, to one that moves inside and outside the team. We hope to shift people's thinking about what a team is, how to build a team, and how to manage team transitions. We hope to shift your ideas about what makes a team effective, and ultimately, how to create innovation and change in organizations.

Research Approach

The ideas behind the X-team concept emerged from a research program that occurred over many years and featured a number of coauthors. The ideas come from watching real teams discover that taking a more external approach enabled them to succeed. The research includes many different kinds of teams, including nursing teams, sales teams, consulting teams, product development teams, and oil exploration teams. These teams span multiple industries, including telecommunications, education, energy, pharmaceuticals, computers, and financial services. The results have been written up in many journal articles that are referenced here for those readers who would like to see more of the statistics and sampling procedures that provide the basis for this book.

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Our earliest study—of nursing teams—examined what happened to teams that had extensive team-building training as part of a large quality of work life project. The hope was that through training in conflict resolution and decision making, nursing team performance could improve. Unfortunately, though much time and money was spent on this project, and nurses reported a greater ability to interact with each other, audit data indicated little change in performance.

Next came a study of one hundred sales teams in the telecommunications industry. Results showed that teams that excelled at internal dynamics were more satisfied than other teams and thought that they were better performers, but also showed no differences in actual revenue attainment than teams that did not have this focus. This raised an important question: what does account for team performance?

By collecting both qualitative and quantitative data, by looking at the logs of team member activity, by interviewing scores of members and leaders in consulting teams, product development teams, drug development teams, and oil exploration teams, answers began to emerge. It was an external emphasis paired with external ties, an expandable structure, a flexible membership, and extreme execution that differentiated high- and low-performing teams. It was also the ability of these teams to shift their activities over their lifetime and not get bogged down in one phase of work.

But these were teams that already existed within organizations. The next question was this: could we *create* such teams? Furthermore, could teams work with top management to *lead* change? Here we moved into consulting and executive education mode and actually intervened in organizations to create X-teams. At Merrill Lynch, BP, and CVRD (the Brazilian mining conglomerate), and within our own institutions, our interventions have been very successful, with teams developing new financial products for Merrill Lynch, designing new processes for project management at BP, formulating a global strategy for CVRD, and consulting to entrepreneurial enterprises around the world. We'll look at some

of these teams—and how companies can develop their own X-teams—in the last part of this book.

About the Book

We have divided this book into three parts. Part 1, chapters 1 and 2, describes the dominant “internal view” and explains how the world has changed in fundamental ways, rendering the old paradigm obsolete. Part 2, chapters 3–6, builds a framework to overcome the challenges. It outlines the building blocks needed for teams to engage in a complex web of complementary internal and external activities. Part 3, chapters 7–9, pulls it all together and explains how managers can make the X-team model work for them.

Why Good Teams Fail

Before offering a solution, we need to understand the true nature, scope, and depth of the challenge. Thus, we begin this book with a journey through the landscape of existing thinking on teams. Chapter 1 describes the view of team effectiveness that we have all learned, the one we carry with us in our heads and execute daily, the one that has always made the most sense to us. We then begin looking at the evidence showing that this dominant view does not work anymore.

In chapter 2 we explain why the old model does not work. The reason? Driven by increasingly fierce, fast, and innovation-based competition, organizational life has changed in a number of fundamental ways. First, organizational structures are loose, spread-out systems with numerous alliances rather than multilevel centralized hierarchies. Second, organizations are dependent on information that is complex, externally dispersed, and rapidly changing. Third, teams’ tasks are increasingly interwoven with other tasks both inside and outside the organization. As a consequence of these changes in organizational life, distributed leadership is now part of the corporate landscape. All of these changes have

had a profound impact on teams' job descriptions; in fact, they have fundamentally changed the rules of the game. We explain how.

What Works

To deal with the new realities, teams need to engage in a range of external activities. This is the first core principle of X-teams and the subject of chapter 3. First, *scouting* helps a team gather information located throughout the company and the industry. It involves searches inside and outside the organization to understand who has knowledge and expertise. It also means investigating markets, new technologies, competitor activities, and organizational cultures. Second, *ambassadorship* is aimed at managing upward—that is, marketing the project and the team to the company power structure, maintaining the team's reputation, lobbying for resources, and managing allies and adversaries. Third, *task coordination* is for managing the lateral connections across functions and the interdependencies with other units. Team members negotiate with other groups, trade their services, and get feedback on how well their work meets expectations.⁵

As chapter 4 concretely lays out, internal processes are also needed to complement the external ones. The second core principle of X-teams, extreme execution, contains the internal processes that are needed to seamlessly coordinate external processes of an X-team, hold the team together, and enable the team to integrate information and expertise. By using the term *extreme* we mean to underline the fact that external activity does not eliminate the need for internal process; rather, it expands that need. External activity brings additional information, divergent opinions, and political bickering into the team. Extreme execution is needed to keep the team moving in the face of these additional challenges.

Chapter 5 describes the third core principle of X-teams: flexible phases. This is a model consisting of three stages—exploration, exploitation, and exportation—as illustrated by the story of a team at Merrill Lynch.⁶ This

chapter is a critical part of the X-team story because it lays out how team activities need to shift over time to maintain innovation and speed. It is also a central part of the book since it shows how these shifts over time become a vehicle through which the X-team demonstrates distributed leadership in action. The second part of the book concludes with chapter 6, outlining the three X-factors (as illustrated by the Netgen story)—extensive ties, expandable tiers, and exchangeable membership—which are the structural components that support the three core principles of X-teams.

How to Build Effective X-Teams

In the final part we pull everything together that the book has described so far and offer a hands-on guide to creating X-teams. In chapter 7 we provide concrete steps and checklists so that teams can move from a more traditional form to an X-team approach. Chapter 8 then describes in detail how to launch and manage X-team programs. Here we build on our experiences at Merrill Lynch, BP, CVRD, and MIT, where we, with the help of others, have successfully built a series of X-teams and a structure of ongoing innovation and organizational change.

Chapter 9, our final chapter, outlines how top management can build an organization in which X-teams thrive. Here we show how three successful organizations—Southwest Airlines, Oxfam, and Procter & Gamble—use X-teams as a vehicle for distributed leadership in action. We articulate the key dimensions of distributed leadership, show how X-teams can embody and give life to this form of leadership, and outline what top management can do to foster such an organization. After all, X-teams cannot meet their full potential to lead without a supportive organizational context. While building such a context only happens over a long period, and with a lot of work, organizations need to foster the processes, structures, and culture necessary to unlock the potential of X-teams. In turn, X-teams help model and shape these processes, structures, and culture.

Teams, teams, teams. They take up enormous amounts of our time, frustrate us, compel us, and motivate us to get the job done. We are sometimes told that teams are out of vogue, yet companies are filled with teams and still struggling with how to improve their performance, pundits are still writing books on how to manage them, and we are all living with them at home and at work. We are surrounded by teams and yet they remain an enigma.

We believe not only that teams are here to stay but also that their importance as vehicles for leadership, innovation, and change is likely to increase. As a consequence, the challenges they face are likely to become ever more multifaceted and difficult. This book offers the X-team as the modus operandi to take on these challenges and turn them into breakthrough performance.

Throughout this book we will be looking at a set of teams to help us illustrate the many facets of X-teams. Their stories, some with disguised names, will be woven throughout.

The Southeast and Northwest teams are names given to two consulting teams run by managers we call Sam and Ned. These teams were created in a new organizational design to better serve the educational curriculum needs in particular geographic regions. The teams had to consult on new educational materials and methods that the regions might use. While both teams were created at the same time, with the same mission, and with two very talented leaders, one ended up doing very well—the X-team—and the other ended up imploding.

The Big Bank team demonstrates how an X-team may be critical for new teams that are set up when there is a major organizational change. Here teams in a large telecommunications firm we call BellCo were created to serve industry segments rather than geographic areas. The Big Bank team was put in charge of the banking industry. Team members had to learn how to be more aggressive in their selling, how to cater their sales to this particular customer segment, and how to bundle their existing products into systems that produced a solution for their customer's

business issues. On top of that they needed to create new ways to work together and to work with other parts of the organization with whom they were interdependent. In the end, they made it all work and helped the company figure out how their new design could actually be implemented.

The Razr team at Motorola is an example of how an X-team can create radical change in a stodgy culture. Given the challenge of creating a new mobile phone, this team was able to stay true to its name and develop a thin, sleek phone that blew the competition out of the water. Team members were able to do this quickly and despite many political land mines, pockets of resistance, and bureaucracy.

Team Fox demonstrates how one X-team was able to operate in the network-like realm of pharmaceutical companies. Here the core technology of the firm—molecules—come from outside, not inside, the company. Teams need to scout various environments—from universities, to small start-ups, to research labs—to find the molecule they need and figure out how to bring it into a large corporation.

The Netgen team in Microsoft featured near the beginning of this introduction did not start off with top management's blessing. Members had to fight to get resources and to have their ideas heard. They developed a vision and stayed true to that vision even when others in the company ostracized them or grew jealous of their status. They fought to separate from the firm to develop very innovative ideas and then struggled to integrate back into the mainstream of the company. In the end, they managed to merge their ideas into the Microsoft culture.

Before we can explore the lofty results of X-teams like those just described, however, let us begin with the basics: an in-depth look at the existing thinking about teams—and evidence for how that thinking is failing to help organizations meet current challenges.

NOTES

Introduction

1. Paul Davidson is not his real name.
2. The term “distributed leadership” first appears in T. Malone, *The Future of Work* (Boston: Harvard Business School Press, 2004).
3. S. Levy, “Microsoft gets a clue from its Kiddie Corps,” *Newsweek*, February 24, 2003.
4. T. Malone, *The Future of Work* (Boston: Harvard Business School Press, 2004).
5. D. G. Ancona and D. F. Caldwell, “Bridging the Boundary: External Activity and Performance in Organizational Teams,” *Administrative Science Quarterly* 37 (1992): 634–665.
6. The three stages model was first introduced in D. G. Ancona and D. F. Caldwell, “Making Teamwork Work: Boundary Management in Product Development Teams,” in *Managing Strategic Innovation and Change, A Collection of Readings*, ed. Michael L. Tushman and Philip Anderson (New York: Oxford University Press, 1997), 433–442.