

Thoughts on the Coxe/Maister model vs. the Heifetz model of work

By Kyle Davy (2006)

The Coxe/Maister model was a significant breakthrough in strategic thinking about professional service firms developed by David Maister. Maister's basic point was that you have to balance the overall firm design (staff, organizational structure, and economic structure) around your choice of the project types - and in his case he set out the classic set of three types which you address. He then carefully links the choice to the economic business model (selling hours) that I believe is at the heart of his model. (This was how the "best practice" attorneys, accountants, and management consultants that he primarily worked with did it.)

A couple of trends that have transpired in the decades since Maister put forth this model have begun to erode the central place that such a model should play in strategic thinking for firms. First, we have moved slowly, but steadily, away from a project focus toward a client focus as the center of firm strategic thinking -- how do we serve the holistic needs of a client, which may involve all three types of project work? This I think has taken away the primacy with which his model was treated in the 80s.

The second is the recognition that all three of Maister's types are still just different forms of technical work. There are other ways of beginning to conceive of fundamentally new models of practice that wouldn't start with this technical work foundation. Here is where the insights of Ronald Heifetz enter. He observed that beyond doing technical work, increasingly clients (individuals or organizations) need a different form of work from the professionals that they work for -- the ability to help them tackle the increasingly complex problems for which technical work is an insufficient (often counterproductive) response. This was the realm of adaptive work in his language. He pulled adaptive work into two subsets. The first were situations that were complex and would require considerable learning and collaboration on the part of both the client and the professional, but where an answer that solved the problem is possible (collaborative work). The second were the more serious situations where there are "no easy answers" and the client needs leadership to help them adapt to new unfolding conditions, including the potentially deep change around fundamental values and ways of living.

Interestingly, even in the realm of Heifetz' "technical work" (which can be any one of the three Maister types) there is still a need for new social and leadership skills in order to create higher forms of value for clients.

So, the Heifetz notion of adaptive work and the three categories that Susan Harris and I outline in our book is not proposed as a simple "rejigging" of the Maister/Coxe model. It is a new model that can allow firms to significantly expand the possibilities for value creation into new (for the most part untravelled) territories. Firms could choose a particular type of adaptive work as their focus and largely ignore a choice of project type. Or, they could move to higher levels of value creation in any (or all) of the three Maister/Coxe project types by adding the social and leadership skills needed to address the more serious adaptive challenges that clients (who often think that all they need is a building or a piece of infrastructure) are facing. I should note that, in some cases, attention to adaptive work may actually result in the elimination of the need for the technical work of producing the building or piece of infrastructure.

I would emphasize that from our perspective the needs of clients, driven by new levels of social and technological complexity, are shifting toward the primacy of needing someone to lead them through these adaptive challenges over a simple task focus. This is particularly true for Type II Collaborative Work situations which are now dominating many project types -- the technical solutions for planning and airport expansion pale in comparison to the need for someone to lead a the social constellation surrounding (and often in conflict about) proposed change. Just look at the still unfolding story of the O'Hare International runway expansion in Chicago or the Bay Bridge replacement here in the Bay Area (in that case it will have taken 25 years from the time of the Loma Prieta earthquake in 1989 to the completion of the replacement span now scheduled for completion in 2012).

It wasn't the technical work of this problem that took so long to do, it was the social/political complexity of this Type II project that was completed mishandled, that caused both delays and huge cost increases. Caltrans saw it as a project type (probably gray hair), but it was all about adaptive work in the Bay Area and California. These are mega-projects, but small projects increasingly have the same dynamics.

If leaders do decide to move their practice toward offering collaborative or transformative leadership to their clients and communities, then like any other business model change, their firm will have to begin to significantly change their staff, skills, processes, etc. A caveat with respect to suggestions that this may be the "only" way of avoiding commoditization: I think I would put it that it is "one way" and certainly a significant one, but that there are also a set of other paths that firms can take to avoid the forces of commoditization (for example: developing a disruptive technology).