

Origins & Academics

PART 1 - ORIGINS

- This is a short account of how I came to build the Org Culture Framework (OCF), and how it is both similar and different to some of the most prominent approaches in the field of organisational culture today. It certainly seems to me that the academic basis for “culture dimensions” is proven beyond doubt, but that doesn’t mean to say that there isn’t room for a change to the lens through which we are viewing the culture people experience.

Early influences

- **Studies** – my first brush with organisational culture came through my studies in Human Sciences at university, which was a wonderfully broad degree. In Sociology I was struck by Durkheim’s analysis of the drivers of suicide in society (too much or too little social control); Anthropology highlighted the power of social beliefs created by elders and the fear of deviance from these beliefs; and Social Psychology pointed to the irrational behaviour of people under the influence of authority (Asch, Milgram, Zimbardo).
- I was also influenced by Erich Fromm’s famous book “Escape from Freedom” which was a resounding echo of Durkheim’s earlier insights on the dilemmas of liberty in society. In 1941 he wrote this sentence which continues to resonate with me to this day when I think about the extent to which I still observe people continuing to defer to authority in modern organisations, covering up what they are really thinking and feeling for fear of falling out of favour with a leader:

“Modern man still is anxious and tempted to surrender his freedom to dictators of all kinds, or to lose it by transforming himself into a small cog in a machine, well fed, and well clothed, yet not a free man but an automaton.” (Eric Fromm, 1941)

I went on to study Organisational Psychology at the University of Manchester and wrote my dissertation on the impact of leadership style on creativity in organisations. This was 30 years ago, and on reflection this was the beginning of my fascination with how leaders impact people’s freedom to think – either for the better, or for the worse.

- **Career ambition** – My working career started in management consultancy, but quite quickly I moved into internal “organisation development” roles – typically seated within the HR functions of well-known blue-chip companies. My conviction then – which is just as strong today – is that people and culture can make or break a business. My ambition was to help organisations unlock the power of people in organisations, but above all I wanted to find the keys to that lock. Below I’ve set out some of my observations from these experiences, particularly relating to the link between org culture, strategy, operating model and business performance.

Career experiences – culture and the distribution of power

- **Commercial Union and “living the brand”** – back in the mid 90’s, CU embarked upon a transformational programme of work which put culture at the heart of its business strategy. It emphasized “living the brand” and brand trust. I developed a behaviour framework centred on the theme of “well managed commitments”, and authentic interactions with customers were communicated at corporate level as a critical success factor. This was my first experience of a business which took culture seriously, in particular as it went through various mergers and acquisitions (General Accident and Norwich Union). Its performance has stood the test of time, and in its current form, Aviva, the people agenda is still high on the business agenda.
- **Pharmaceutical ambidexterity** – after Commercial Union I moved onto the pharmaceutical industry and experienced first-hand the importance of varying degrees of freedom according to function. Manufacturing sites in Dagenham (Sanofi-Aventis) and Liverpool (PowderJect, Chiron, Novartis, GSK) were continually troubled by quality issues as management attention was diverted by M&A deals. Process and procedural control is vital in these environments, and you take your eye off the ball at your peril. But of course the R&D functions of these same organisations needed the scope to think freely, so the business requirement was clear – cultures needed to vary substantially between functional areas.
- **Unilever’s global/local dilemma** – in 2006 I moved on to work at this global FMCG giant and spent 7 years helping them to navigate some fundamental shifts in strategy, operating model and culture. Unilever had historically grown through local acquisition and its cultural DNA was well known to be “local for local” with a country-based operating model – in short, there was a lot of local freedom within a light corporate framework. So when it tried to shift its operating model to leverage the global power of its brands – an approach characterized as “think global, act local” and represented by the phrase “Global Mindset” – this led to an internal debate that lasted many years.



Although most people could see that carrying out more marketing activities globally had upsides (e.g. increased brand consistency, reduced marketing effort), many local teams felt that their ability to precisely tailor the marketing of a product to local customers would be impaired. Local customer intimacy would be lost, along with market share. Their “freedom to think” (creative marketing) was being curbed and the trade-off was too great. In the end a new balance was struck, but not without cultural norms putting up a substantial fight. As part of my work, I introduced the idea of “Leadership Moments” to describe the courage required to have the honest conversations needed to make timely decisions, and to my relief at least this was welcomed globally without a struggle.

- **What & how and deference at Barclays** – five years after the financial crisis of 2007/2008, Barclays was attempting to reinvent itself culturally as part of a wider Transform programme. I joined them to link their new values & behaviours to people management practices, in particular their approach to performance management. What I witnessed there was the stuff of cultural extremes. A key objective of Transform was to get staff to focus more on “how” they went about their jobs in the service of a wider range of stakeholders, rather than just the “what” of profit and bonuses. This endeavour was respected, but hardly embraced and I found that the bonus culture was still a powerful driver of behaviour.

However, what I found most striking was the culture in my own function and vertical. The degree of deference to ideas and ways of working that our senior leaders required was astonishing, and most people didn’t risk expressing difference. You could say that this was a reaction to or compensation for the lack of behavioural control elsewhere in the bank, but what I experienced was old-fashioned management by fear and people behaving like Fromm’s obedient cogs. Recently, and following similar dynamics at ACCA, I coined the term “**strong vertical force**” to describe how employees tend to look upwards rather than outwards in organisations when their leaders require this kind of unquestioning loyalty.

- **The Coop, FCA and Kings College London** – by this time the seeds of my “degrees of freedom” thesis on culture in organisations were starting to germinate, and in my consequent interim assignments I found plenty of evidence to validate the idea. In fact at the Coop in 2016 they introduced the phrase “freedom formula” into the corporate lexicon to describe how business areas should think and act within a framework of cost/quality/service parameters. Ironically, this concept emanated from a business area led by an executive with a heavy top-down style, another case of the “strong vertical force” driving upward-looking, over-deferent behaviours.

At the FCA, this time not surprisingly, the degree of operational formality and process control was in line with expectations for a financial services regulator (low degrees of freedom), but this had implications for the rate of internal change. By contrast, my short interim assignment at Kings College London was more akin to the Unilever experience – a classic case of the various academic schools across the university being asked to adopt standard processes to bring about a greater degree of internal coordination; a shift from higher to lower degrees of freedom, going against the cultural grain.

- **The ACCA experience** – the cultural journey at ACCA, closely linked to work on strategy and operating model, was remarkably similar to what I encountered at Unilever.

The value proposition was less complex, and the organization a fraction of the size, but the politics of who fundamentally did the work of innovation (global teams) and who did the work of delivery (local geographic teams) were no less intense. Many local teams were reluctant to let go of local marketing activities for fear of losing the customer intimacy to which they were accustomed, but a tendency to debate issues in management forums and cater to the views of different factions meant that this issue circulated for a long time without clear resolution. In addition a culture of politeness and coded conversations masked the underlying disagreements and limited the rate of change. In my work on culture change I coined the term “Beyond Polite” to galvanize leadership teams to surface what they were really thinking and feeling, and expedite decision making – a behavioural call to action similar to Leadership Moments at Unilever. Amidst all of this, and against the cultural grain, I once again encountered the “strong vertical force” dynamic in a particular business area. The degree to which employees were obliged to defer to the views of certain leaders was very marked, with implications for the wider business transformation agenda.

- I realized a number of things from these experiences:
 1. **Culture is very closely linked to the work people do, and the power that this gives them.** People in organisations are afforded particular degrees of freedom to think and act, according to their role and place in the operating model and the needs of strategy. “The way things get done around here” is a practical description of the cultural norms that act to constrain thought and action to various degrees; and people can get very wedded to these norms as they define how much power they have in their business areas (leaders) and jobs (employees).
 2. **The norms that constrain thought/action are both leadership dilemmas and leadership decisions.** The distribution of power in organisations is a hot topic, and the substance of many leadership dilemmas, but in the end senior leaders need to decide who owns or takes the lead on defined activities, and how much freedom to think and act is allowable in a business area. And ultimately the CEO may need to get involved – it is their strategy and operating model, and if people need to let go of certain activities then sometimes an intervention at this level may be necessary. Without this kind of commitment to resolving dilemmas to the extent that people are clear about what is expected of them, the power struggles and stand-offs between senior executives can last for years. This can lead to a level of internal focus which is self-serving and organisationally dysfunctional.
 3. **The degree to which people are allowed to express views which differ from current norms, or influence decisions which reflect these norms, has serious implications for how quickly a business area will adapt to emerging environmental shifts.** When new information has come to light which indicates a change in direction would be wise (e.g. a change in customer needs), over-deference to the status quo – or the in-group consensus, or the leader view – is a recipe for business failure. But even in today’s apparently liberated millennial workforces, the “strong vertical force” is still exerting its inescapable influence. If leaders either directly or indirectly punish the expression of differences, most people will fall in line vertically regardless of what they see approaching from other directions. The dynamics of in-group psychology, or group-think, remain incredibly powerful.

Creation of the Org Culture Framework – leadership dilemmas and a single golden thread

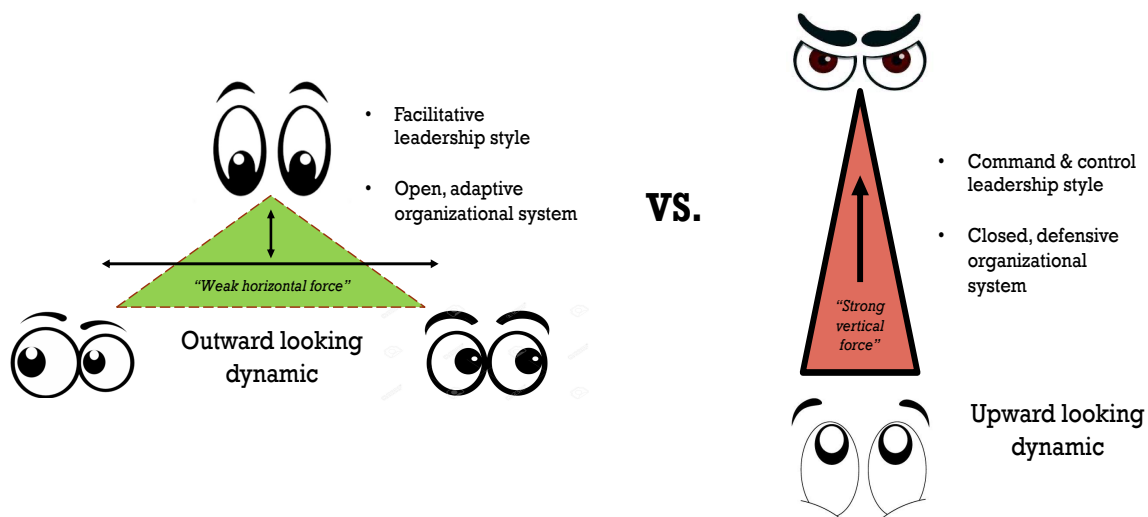
- In the spring of 2016, following an interim assignment at Direct Line Group, I decided to experiment with a new model of organizational culture that centred around the leadership dilemmas that I had observed over the course of my career. I had a hunch that many of these dilemmas would link to the core “solution” (product/service) development and delivery processes that sit at the heart of organisations, but also the concept of “degrees of freedom”, and I wanted to put the idea to the test.
- Fairly quickly I came to the conclusion that all the leadership dilemmas I had encountered over the years could be laid out in relation to a common “degrees of freedom” scale. For example, a way of working characterised by long term thinking (vs. short term thinking) is less constrained – the number of available options are greater because you are less boxed in by the constraints of time and immediate circumstances which cannot be changed.
- Some group behaviour traits such as degrees of extroversion/introversion didn’t seem to be linked to degrees of freedom – so not everything about culture could be described in this way – but these dimensions were less about leadership dilemmas. They didn’t seem to be cultural issues of high strategic impact.
- What I found is that most dilemmas could be clustered under a Thinking or Acting theme – hence the terms **“Freedom to Think”** or **“Freedom to Act”** – with this approach enabling people to think about culture in their area linked to the work they do. For more senior leaders, it would allow them to think about the culture required to deliver their unique value proposition – a cornerstone of business strategy – and support the associated operating model. Please refer to the diagram below, which is linked to Treacy and Wiersema’s thinking (discussed later), to visualize how these various elements align:

HOW CULTURE LINKS TO STRATEGY

Strategy/Culture Connection		Low degrees of freedom	High degrees of freedom
Strategy	Solution development work phase	Copy & improve strategy “Functional”, fit for purpose, price-competitive product or service.	Big innovation strategy Market-leading product or service; first to market premium.
Culture	“Freedom to Think”	Efficiency & Continuous Improvement Ways of working focus on adaptation, continuous improvement, efficiency and waste reduction.	Creativity & Innovation Ways of working focus on innovation, creativity and thinking outside the box.
Strategy	Solution delivery work phase	Customer assurance strategy Standardised but reliable product or service. Business relies on the customer's trust in quality and the brand. Global operating model principles.	Customer intimacy strategy Customised, flexible, personally intimate product or service. Local operating model principles.
Culture	“Freedom to Act”	Reliability & Consistency Ways of working focus on the delivery of reliable, consistent solutions to customers, through an emphasis on standardisation and control.	Agility & Responsiveness Ways of working focus on customer responsiveness through high levels of discretion, and informal ways of working. Local operating model principles.
Strategy	Stakeholder focus	Internal stakeholder interests primary Emphasis on vertical integration up through “silos” in the service of managers/owners.	External stakeholder interests primary Emphasis on horizontal integration across “silos” in the service of external stakeholders.
Culture	“Freedom to Differ”	Inward, hierarchy focused Employees deferent to vertical management authority and ideas; upward looking with a focus on meeting management needs and adding owner value.	Outward, market focused Employees connected with people, information and ideas outside of the vertical hierarchy; outward looking with a focus on meeting customer needs and adding broader social value.

- What I also found is that some dimensions were linked to both thought and action, underpinning the core work cycle – **deeper culture**. They were about relationships, social norms and decision making powers, but also at a higher level the question of stakeholder focus – whose interests were of primary concern. Again these are classic leadership dilemmas: balancing the needs of customers and society (external focus) with shareholders and employees (internal focus).
- Characterising this cluster of underpinning dimensions was less easy, but in the end I was reminded of my stark observation that human behaviour in organisations can very easily become siloed and “upward looking” to fall in line with the wishes of stakeholders within their hierarchy e.g. their team, their leadership chain, the CEO and ultimately business owners. I call this the “**strong vertical force**”. And associating with ideas and interests **outside** of the vertical can be perceived to be hazardous by employees when their leaders adopt a “command and control” style. This tentative outward looking dynamic, by contrast, can be described as the “**weak horizontal force**”. See below for a graphic illustration.

IMPACT OF LEADER/FOLLOWER DYNAMICS ON ORGANIZATIONAL ADAPTABILITY



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- I considered the terms “Freedom to Connect” and “Freedom to Associate”, but in the end I settled on the phrase “**Freedom to Differ**” (FtD). The dimensions here describe the extent to which employee views that are different from established norms are assimilated, how acceptable it is to air these views in an open and candid way, and critically how much behavioural flexibility is allowed in relation to these the norms. The norms themselves emanate from the group, the leader, or the status quo, with these sources reflected in the three dimensions in this cluster. In essence “Freedom to Differ” mirrors the classic in-group vs. out-group construct from social psychology and reflects Cameron & Quinn’s statistical finding that organisational cultures are to varying degrees internally or externally focused.

However I feel that applying a “Freedom to Differ” lens explains at a more fundamental level the inter-personal dynamics that create internally/externally focused cultures.

- On reflection, concluding that a common “degrees of freedom” scale can be used to describe a large proportion of organizational culture is hardly a startling discovery. Freedom/constraint and deviancy from norms is a fundamental aspect of social organisation and has been noted by philosophers and sociologists since the dawn of history. However it seems that only one other recent theory of organisational culture has come to this same view, using different terminology. I shall mention Michele Gelfand’s notion of Loose/Tight cultures in my brief review of the literature below, but I only stumbled across her work by accident as recently as March 2024. I was using the wrong search terms in Google, and only entered the words “loose/tight” when researching best practice on organisation design.
- Two last things to note about the Org Culture Framework – firstly, I struggled for some time with how best to represent the classic trade-offs of cost, quality and speed. In the end I came to the conclusion that these “success factors” were better portrayed as the impacts of culture rather than culture per se. For example, a norm around high involvement in the development of product/service solutions will typically result in higher quality, but increased costs and reduced speed to market. I played around with a Quality vs. Speed culture dimension for a number of weeks, but ultimately found it more insightful to think of culture as the behavioural pre-cursors of these outcomes. In fact in my survey tool I ended up including a final couple of questions not linked to degrees of freedom - the perceived impacts of culture on cost/quality/speed/solution uniqueness, and a question on stakeholder primacy linked to “Freedom to Differ”.
- This brings me to a final point in this development story. How best to portray the dimensions of culture is of course ultimately subjective, and everyone will have their preferred model. A framework is just that – a simplification of reality and something that needs to be both tested for validity and accompanied by other tools. However I do hope that the simplicity of the common “degrees of freedom” scale will make discussions around culture more accessible to leaders and their teams; and critically enable them to plot where they need to be culturally in order to drive sustainable high performance. Closing the gap between required and current culture is then the focus.
- And there is also a research opportunity. The framework, and in particular the FtD dimensions, prompt a number of important questions which could readily be tested if sufficient data is captured by the Org Culture Survey tool. For people interested in engaging in this potential research endeavour, please see the relevant website page.
- Part 2, below, is a summary of the main alternative models and frameworks in the field of organisational culture. I will mainly be drawing attention to points of similarity and difference, and giving a personal view on pros & cons.

PART 2 - ACADEMICS

Michele Gelfand – a single, unifying culture factor

I have chosen to talk about Michele Gelfand's work first because of its striking similarity to my own approach. However the truth is that I only came across her work very recently in March 2024 whilst I was researching expertise around organization design. At that point my "degrees of freedom" approach was already refined and the Org Culture Survey tool created.

I had entered the phrase "loose/tight organisations" into Google, and by chance stumbled across Gelfand's 2018 book "Rule Makers, Rules Breakers – Tight and Loose cultures, and the secret signals that direct our lives". On reading the various summaries available on the internet, I was stunned to find that Gelfand had also been researching culture in relation to the same degrees of freedom concept, albeit using different loose/tight language, for over a decade.

I immediately bought the book, read it, and was struck by two sets of emotions. Firstly relief that the concept had been academically validated and was therefore credible. This brought a sense of legitimacy and ultimately gave me the confidence to publish my approach on this website after having suffered imposter syndrome for a few years – due to ambivalence from a couple of business school professors, and the feeling that unless I had a PhD I was not qualified to put forward a new model of culture.

The second set of emotions was linked to the sense that maybe there really was an underlying truth about organisational culture which had been exposed. If two people had independently come to the same conclusion, then this felt significant and important. Given my Human Sciences degree, and its emphasis on evolutionary studies, this felt to me like a kind of Darwin-Wallace moment!

I won't go into much detail about Gelfand's approach here, but in short her thesis is that cultures typically vary on a universal Loose/Tight dimension linked to the degree of environmental threat or risk. Tight cultures are an adaptation to harsh conditions where people need to come together and align strongly, whereas loose cultures tend to exist where the opportunities outweigh the threats and there is an upside to allowing people greater degrees of freedom within a framework of light social norms.

Whilst I believe that in an organisational context there are more reasons for cultures to be tight and inward looking – for example, linked to the controlling or self-serving personalities of some senior leaders – overall I think Michele Gelfand has hit the nail on the head. The loose/tight lens dramatically simplifies the way we think about culture in social groups and organisations.

However her book is more of an overview, and only one chapter (number 7) is devoted to a consideration of Loose/Tight cultures in the organisations of day-to-day working life (private, public or third sector). And whilst the commentary is compelling and mentions various cultural elements, only one diagram in that chapter – on page 154 – gets close to setting out various dimensions of organisational practice which could provide a basis for cultural diagnosis and change.

As a result, I came to the conclusion that there was still a lot of benefit to be had in publishing my Org Culture Framework and associated Org Culture Survey. It not only provides a navigational map of the terrain, but also a practical change tool and way of connecting culture to leadership dilemmas, operating model considerations, people capabilities and ultimately an organisation's unique value proposition and strategy. The required vs. current vs. desired aspect of my approach is closer to Hofstede, and I feel that this is also a necessary feature to help business leaders quantify the size of the challenge.

So, in summary, I believe Gelfand's work to be a breakthrough in how we think about culture. But in an organisational context it lacks some definition/structure which I believe would magnify its impact as a practical approach and tool.

I will now go on to talk about the work of Cameron & Quinn and Hofstede. Both of these frameworks have notable similarities to my approach, but lack the simplicity of a unifying loose/tight or "degrees of freedom" concept.

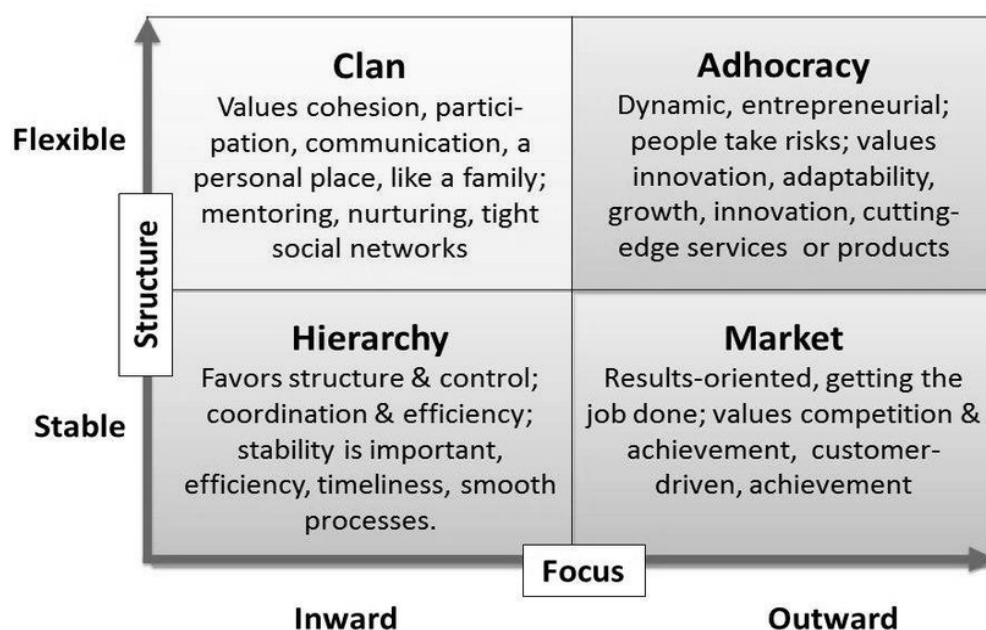
Cameron & Quinn – a two-dimension approach

This is possibly the most widely recognized culture framework, and in 2011 the authors claimed that it was the dominant framework in the world for assessing organizational culture.

Fundamentally it views culture in relation to two dimensions, based on a trait-style approach, which represent "competing values":

- Internal Focus and Integration vs. External Focus and Differentiation
- Stability and Control vs. Flexibility and Discretion.

These dimensions were derived from statistical analysis in a quest to find "a more parsimonious way to identify the key factors of effectiveness" (a quote from their book).



However, as can be seen by the above diagram, C&Q set out the two dimensions in 2x2 matrix form creating four cultural clusters – Clan, Hierarchy, Adhocracy and Market. A questionnaire is then completed in relation to a further set of org effectiveness factors that link back to these four clusters – Dominant Characteristics, Organisational Leadership, Management of Employees, Organisational Glue, Strategic Emphases and Criteria of Success. A spider diagram plot linked to the 2x2 matrix is then created to illustrate the cultural shape of the organization.

The distillation of culture into two essential dimensions which have been validated statistically is without doubt very insightful and useful. C&Q say that “...the most appropriate frameworks should be based on empirical evidence, should capture accurately the reality being described (in other words, they should be valid), and should be able to integrate and organize most of the dimensions being proposed.” As a practitioner I’d agree that the two “competing values” dimensions do this, albeit at a very high level, and conceptually it is easy to see how my FtT and FtA areas map onto Control vs. Discretion – FtT and FtA just drill down into the two classic phases of a work cycle.

However there are a few things about this approach that I’m less keen on:

1. C&Q re-introduce complexity by scoring against another six factor lens to arrive at scores in relation to the four clusters which then link back to the two dimensions. But then there are two scores on each dimension to give a score for each cluster, and this seems to contradict the main point around competing values. To me this methodology feels rather convoluted and a bit wonky. Why not just ask people to rate org culture on the two “competing values” dimensions based on what they see?
2. I’d also say that the four cluster typology then runs the risk of over-simplifying org culture. The continuous scales of the two core dimensions mean that there are many cultural permutations & combinations to be considered across these scales. The four cluster typology reduces this variation considerably even though the 2x2 matrix format provides comfort in the familiar.
3. With respect to the internal vs. external dimension, I have seen that many organisations strive to be internally integrated so that their customers experience quality and consistency of delivery, and this can be a strategic differentiator. However in today’s VUCA world no credible organization can afford to be internally RATHER THAN externally focused – it would lose the trust of customers and ability to adapt to environmental changes. So I feel that the description of this dimension is slightly spurious – although “internal focus” may describe what people see, to me it feels more like a cultural dysfunction and doesn’t really provide insight into why internal focus has become predominant. My observation is that what causes a dysfunctional level of internal focus is an over-deference to the vertical needs/wishes of management and business owners, resulting in the attention of the workforce being focused upwards (the “strong vertical force”) rather than outwards towards the customer (the “weak horizontal force”). For me, this provides a root cause explanation. I would suggest that the real conflict here is the competing interests of internal and external stakeholders; and the degree of tolerance of views that are different from the in-group/hierarchy in a locality is the key to understanding how external focus can be lost.

4. The final point I'd make is that, although it can be deciphered, C&Q do not connect their Internal/External Focus dimension back to the same "degrees of freedom" construct which is clearly underpinning their Control/Discretion dimension. Michele Gelfand did spot this common denominator, and I believe it provides a simple reference point for people to anchor themselves back to if they get lost navigating the cultural landscape.

Geert Hofstede – a multi-dimension approach

Geert Hofstede is an established name in the field of culture, and rightly so. He, along with Fons Trompenaars, is most famous for his pioneering work on national culture which identifies six dimensions, some of which look very similar to those named in my Org Culture Framework:

- Individualism vs. Collectivism
- Power Distance
- Femininity vs. Masculinity
- Uncertainty Avoidance
- Long Term vs. Short Term Orientation
- Indulgence vs. Restraint

Recently I have also discovered Hofstede's supplementary work on organisational culture which is now led by an outfit called "The Culture Factor". This identifies six dimensions, which appear to have an association with the original national culture model, but are adjusted for an organizational context where culture is typically bounded by a defined purpose and set of goals. These dimensions are:

- Means oriented vs. Goal-oriented
- Internally driven vs. Externally driven
- Easygoing work discipline vs. Strict work discipline
- Local vs. Professional
- Open system vs. Closed system
- Employee oriented vs. Work oriented

Again, it is easily seen that at least two of these dimensions are similar to those in the Org Culture Framework, but there are a number of differences in framing.

For example, I consider whether an organization is open vs. closed to be related to whether it is internally vs. externally driven, and both of these elements are related to leadership style (ref. the "strong vertical force") and whose interests are primary – internal stakeholders such as management and shareholders, or external stakeholders such as customers and society.

And for me the tension is less about whether there is a work or employee orientation – work is the basis for an employee contract and to all intents and purposes a given – but rather whose interests are employees primarily serving. In reality employee needs are pitted against both vertical (upward looking; management needs) and horizontal (outward looking; customer needs) forces, and their wellbeing can take a hit in either scenario.

In addition, Hofstede's Work Discipline dimension is fundamentally about the degree of structure and process needed to achieve goals, which I feel is closely related to Means vs. Goal orientation. In the OCF, I have chosen to consolidate both of these elements under the Work Structure dimension. And my experience is that the Local vs. Professional question is more often manifest as a Local vs. Global tension linked to operating model and strategy considerations.

The other main point of difference between Hofstede and the OCF is that the underlying "degrees of freedom" concept is not identified, although it could easily be inferred.

In terms of similarity, Hofstede's approach is also to look at gaps between what he calls "optimal culture" and actual, perceived and ideal culture. For me actual culture is the same as perceived culture, it just depends on what method you use to measure it. "The Culture Factor" measurement tools do, by chance, use the same 0-100% scale that I decided on, but each of the six dimensions is then broken down into 6 questions, meaning 36 questions in total. For me this is at the limit of useability.

"Optimal culture" is really same concept as "Required culture", but the mechanism to connect culture to the core work of teams and strategy is less clear. That's for me where the "degrees of freedom" concept adds value – not only does it help users to "see the wood for the trees" in discussions around culture, preventing them from getting lost in a jungle of concepts, but it also creates a means to link culture to the work of teams and strategy.

Treacy & Wiersema's book on "value disciplines", which I shall briefly mention next, was the original inspiration behind my thinking on this culture/strategy link.

Michael Treacy and Fred Wiersema – values disciplines

This is a bit of a diversion from the discussion of different approaches to org culture, but I think it is important to mention this work as it helps to create a line of sight between culture and strategy.

Treacy & Wiersema's 1997 book "The discipline of market leaders" highlighted that, in order to be successful, a business needed to be clear about its unique value proposition – the product/service offering that differentiates it from competitors in a defined market – and then focus on the organisational practices (processes, ways of working etc.) that reflect this proposition. They identified three main "value disciplines":

- **Customer intimacy** – a strategy and value proposition built on closeness to customers, and the tailoring of solutions to their specific needs
- **Operational excellence** – a strategy and value proposition built on efficiencies of scale and product/service delivery which typically lead to advantages to the customer with respect to speed, reliability, quality assurance and cost
- **Product [and service] leadership** – a strategy and value proposition built on being first to market with innovative, leading-edge products or services

A critical point in Treacy & Wiersema's work is that they claim that the evidence shows that it is very difficult for an organization to be brilliant at all three of these disciplines at the same time i.e. there are inherent trade-offs. For example, an organization that wishes to tailor solutions to specific customers is never going to lead on cost/efficiency as solution customization is time and resource intensive. Similarly, an organization that invests heavily in bringing innovative, leading-edge solutions to market – rather than copying and improving existing market solutions – is not likely to be the most cost competitive.

This is not only compelling logic, but also intuitive common sense, and in their book they back up their approach with numerous case study examples.

I have drawn on these ideas in my work, but tried to show how these trade-offs work linked to strategic choices, leadership dilemmas and cultural traits – all connected by the “degrees of freedom” concept. This led to the following infographic – already mentioned above – that connects culture to the choices around an organisation's unique value proposition that are at the heart of its strategy and choice of operating model:

HOW CULTURE LINKS TO STRATEGY

Strategy/Culture Connection		Low degrees of freedom	High degrees of freedom
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So, for me, in the solution development phase, there is a strategic choice to be made between a unique innovation approach and a continuous improvement approach – with implications for degrees of freedom and culture. And in the solution delivery phase there is a choice to be made between customer intimacy and customer assurance on account of operational excellence – again with implications for degrees of freedom and culture.

In a nutshell, the strategy question is, “What is our UVP and how do we want to compete?”, and this determines how loose/tight an organisation needs to be in the design and delivery phases of work – both with respect to operating model and culture.

For example, a pharmaceutical business may decide to invest heavily in innovative research to yield unique medicines, but then needs to be highly controlled in the manufacture of any products successfully exiting medical trials.

I will now return to a consideration of three other powerful “culture trait” approaches before finishing by mentioning some popular alternative culture assessment tools.

Erin Meyer, Wendy Smith and Marianne Lewis, Polarity Partnerships – other multi-dimension approaches and the AND/OR question

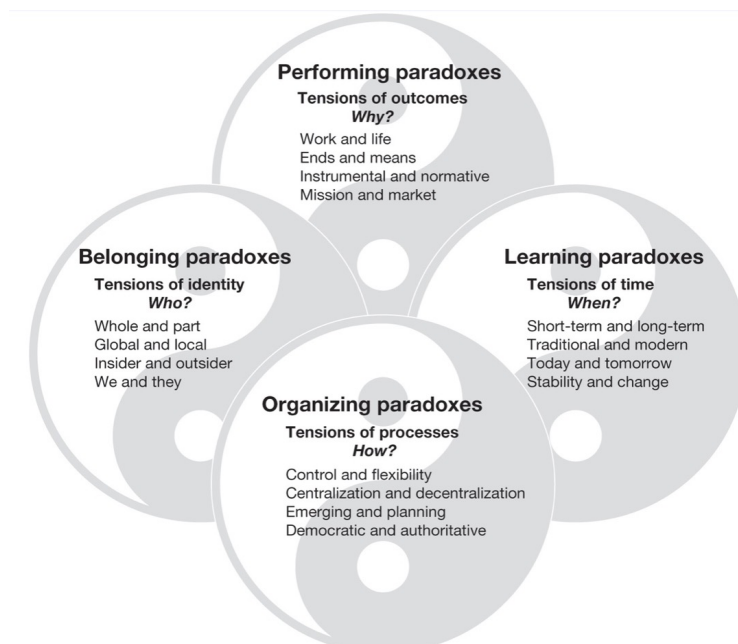
Erin Meyer’s book called “The Culture Map” (2014) and Wendy Smith and Marianne Lewis’ book called “Both/And Thinking” (2022) are probably the two other best known and critically acclaimed pieces of work on organisational culture.

What is interesting to me is that both still adopt a “trait” approach, setting out the main dimensions of culture as they see it using the same X vs. Y format. Regardless of whether these dimensions are referred to as dilemmas, paradoxes, polarities or tensions, what this says to me this says that there is an emerging consensus on the nature of culture in organisations, and it can be expressed in the form of a set of mindset/behaviour balances with extremes at both ends.

Smith and Lewis in particular are very keen to define the subtle distinctions between dilemmas, paradoxes and tensions. But the main point for me is that the best and most reputed experts in the field appear to be agreeing on the fundamental nature of organisational culture.

I’ve set out their models below, and again it is clear that there is a considerable degree of similarity between their dimensions and those of Cameron & Quinn, Hofstede and my own Org Culture Framework.

Wendy Smith and Marianne Lewis’ model of organisational culture:



Erin Meyer's eight culture dimensions:

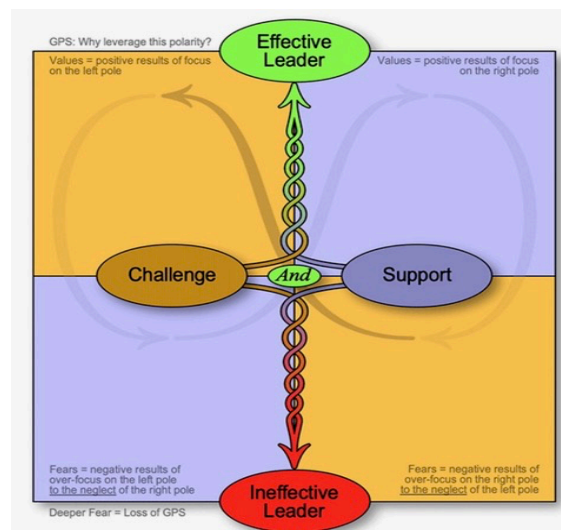
- Communicating: low-context vs. high-context
- Evaluating: direct negative feedback vs. indirect negative feedback
- Persuading: principles-first vs. applications-first
- Leading: egalitarian vs. hierarchical
- Deciding: consensual vs. top-down
- Trusting: task-based vs. relationship-based
- Disagreeing: confrontational vs. avoids confrontation
- Scheduling: linear-time vs. flexible-time

As with Hofstede and Cameron & Quinn, there are clear similarities between the dimensions in these models and the Org Culture Framework. For example, Meyer's Evaluating, Leading and Deciding dimensions are similar to my Freedom of Speech, Leadership Style and Group Emphasis dimensions respectively. And Smith & Lewis' Global and Local, Emerging and Planning, Ends and Means, Work and Life and Democratic and Authoritative dimensions are similar to my Thinking Scale, Time Horizon, Work Structure, Working Flexibility and Leadership Style dimensions.

It seems clear to me that there is an emerging consensus around the content and character of culture in organisations. The main difference seems to be the organising principle that underpins how it is described. With the OCF, I relate every dimension back to a common "degrees of freedom" concept, and I believe the FtT, FtA and FtD areas make it easier for teams to connect culture back to the work they do, operating model and strategy.

However Smith & Lewis (and Tushman) also raise an interesting point around whether it is possible to navigate the tensions between opposing ends of a culture dimension, and as a result be able to create a culture that can demonstrate **both** characteristics. They call this Both/And Thinking, hence the title of their book and the word "and" appears in the description of each culture dimension.

An American consulting outfit called Polarity Partnerships have also adopted this philosophy and proposed that it is possible to navigate around the different polarities of culture, using the ampersand "&" symbol and a motion infographic to illustrate this movement. A thumbnail view of this infographic is shown below, but it's best to view it on their website:



Personally I find this an interesting area for investigation. I've often encountered genuine business and cultural trade-offs in organisations; but I've also encountered denial of these trade-offs by senior leaders who ignore feedback around contradictions, creating unhealthy tensions and stress.

Having said this, whilst I don't believe that it is possible for the **culture** of a business area to **simultaneously** be at one end of a dimension and the other, I have witnessed managers flexing their leadership styles to adapt to different circumstances – and this having a noticeable impact on the culture within their area. And of course a manager always has the option of allocating different responsibilities to different roles and people e.g. one person responsible for short term tactics, and another for longer term strategy. So, whilst I don't believe that you can “have it all” culturally and exhibit every characteristic simultaneously (in the same way that Treacy and Wiersema flag that there are unavoidable strategic trade-offs and choices to be made around value proposition) I do believe that leaders can flex the “degrees of freedom” afforded to their teams to think/act according to the situation.

This is basic situational leadership theory, but I would suggest that this kind of flexibility is only possible if the leader of an area is willing and able to flex their style. And I would also suggest that this is more likely if they are already creating cultural conditions that are balanced (around the centres of the scales) rather than at the polar extremes which often means behavioural inflexibility.

Getting specific, I would guess that an area which is characterised by higher scores on the Freedom to Differ dimensions – which in essence are about how much variability of thought and action is permitted; **the flexibility of the norms themselves** – the greater the ability of an area to flex its culture as illustrated by the Polarity Partnerships graphic. And I would guess that the Leadership Style dimension is the most influential of these dimensions.

Rather than speculate further, I believe that this is an area that would benefit from further research, and as a result I've proposed a number of hypotheses to put the AND/OR question to the test. Please see the Research area of this website if you are interested in commenting on this, or participating in a potential study.

Non-trait approaches – assessing organisational effectiveness and practices that reflect culture

For completeness, I will finish this analysis of approaches to organisational culture by mentioning two other popular outfits and diagnostic tools. These tend to adopt more conventional employee survey approaches e.g. asking participants to Agree-Disagree on a Likert scale against statements which refer to a range of organisational behaviours and practices that reflect the prevailing culture. They are different from the trait approaches mentioned above which frame culture in relation to tensions/dilemmas based on a centre-pointed behaviour scale.

I am a big fan of these kind of surveys and what they can do to enhance employee voice and employer awareness of cultural strengths and weaknesses. However, they do tend to cover similar ground to traditional employee surveys, albeit with a heavier weighting towards questions that covers issues relating to team & organisational effectiveness such as purpose, goals and decision making.

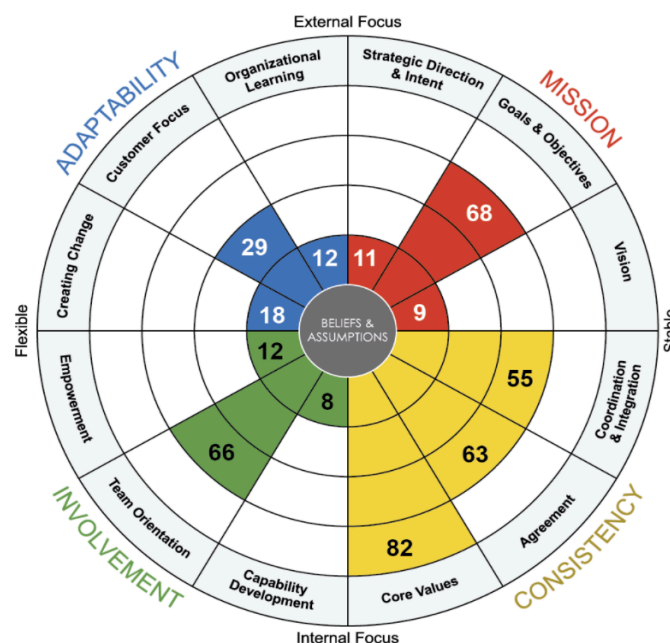
What they don't do so well is shine a light on the deeper cultural undercurrents and various tensions/dilemmas at play – in particular issues relating to degrees of control and the distribution of power which can be tricky topics to surface, and often remain unspoken. Sometimes this is a result of low psychological safety and a particular leader's style, and sometimes this is the result of a cultural reluctance to talk about power and control e.g. where degrees of freedom are low, often linked to differences in national culture. A key aim of the Org Culture Survey is to make these discussions more approachable and accessible, based on a business imperative around achieving strategic alignment and organisational agility.

The two models I'll highlight here are from Dan Denison, whose framework is based on Cameron & Quinn's culture model, and Glint who are a well-renowned employee survey organisation, now owned by Microsoft. They are set out below, and quickly it can be seen that they cover a wide range of topics, including strategic direction, vision, purpose, goals, and capability development. The Glint model also calls out Adaptability, which I consider to be an outcome of deeper culture, linked to the Freedom to Differ dimensions.

Overall I'd characterise these as "organisation effectiveness surveys". They cover both "what" and "how" factors; and in relation to the "how", both softer (mindset, culture, behaviours, ways of working) and harder (policies, processes, structures, systems) aspects of organisational life. They tend to cover a wider remit of issues at a higher level, but don't address the undercurrents and inherent tensions of culture in as much detail or in the same way.

That's where I'm going to finish this short tour. Of course there are many other org culture frameworks and diagnostic tools out there – for example the Goffee & Jones and Human Synergistics International models – but I didn't consider them to be as robust as those discussed here, and the links to organisational strategy are less clear.

Dan Denison's model of organisational culture:



THE DENISON MODEL

The Glint model of organisational culture:



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