

Performex

CLARIFYING LINE/STAFF/SUPPORT RELATIONSHIPS

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WHO IS ACCOUNTABLE FOR THE RESULTS?

Who is accountable? This is a key question in sorting out the working relationships within a business. When friction arises between individuals or between departments, when corporate staff, support groups, and operating units are at odds, the problem is unclear lines of authority.

At issue here is the line/support staff relationship - who makes the final decision and who provides support or advice and service? The concept "who is accountable?" has its origins in the military. For example, the combat officer is the line officer. Since he is ultimately accountable for attaining the military objective, he has command authority. He receives advice and service from staff officers and is free to accept or reject their counsel.

The line/staff relationship is a well-tested concept. Armies of the Roman Empire recognized "line authority" thousands of years ago and conquered the world. Alexander the Great may have been the first to precisely define line-staff relationships. The Romans adopted and perpetuated the distinction, and the Roman definition of the line/staff relationship is still very much alive today. This was necessitated by influential Roman soldiers who wanted status but didn't want to be close to the action. These Roman soldiers occupied most of the support or supply positions in the military, and because they had the ear of Rome, a combat commander often found it difficult to refuse their advice.

Since this staff advice often conflicted with the position adopted by the top line command, confusion frequently resulted, sometimes accompanied by a disregard of the orders from the line command. Recognizing the danger, Julius Caesar made it very clear that the soldiers doing the fighting were the line units and that the authority

flowed from Caesar through the line chain of command to the soldiers. No line officer was allowed to look upon staff advice as a command. He was free to accept or reject staff advice at his discretion, always aware that he remained responsible for the military objectives assigned to his unit.

In business, the same terms - line, staff, and support - have been used to describe the relationships people assume as they work together to achieve results. The effectiveness of that effort hinges on a clear understanding of accountabilities. Line people are involved with activities directly related to the accomplishment of the unit's goals. Who is "line?" Typically there are three functions that make up line units. They are: Sales, R&D, and Operations. It takes these core competencies to satisfy customer requirements. Even these can be outsourced leaving but one, i.e. a sales and distribution company. If this is the core competency of the business, all other functions are in a staff or support role. Defining the core competencies of the business (the line), i.e. those that add value, is a vital first step.

Staff and support groups are involved with activities that contribute to the attainment of the line's goals indirectly, generally through advice, counsel, support, and service provided to the line. And, of course, each of these groups have their own project work impacting their own departmental goals.

Typical questions to ask are: Who is accountable for defining and ensuring that business intelligence data is relevant and accurate? Who is accountable to hire, train, or terminate an employee? Who is accountable for the quality control?

Conflicts between line and staff support often arise when the roles of each group are not clearly defined. Understanding is crucial, since the degree of authority granted to specialized staff can vary widely, ranging from simply providing information or advice, to the right to give orders directly.

Disputes may be the result of a lack of communication, poorly defined staff responsibility, disproportionate emphasis on specialized staff interests or uneven workloads. Each of these trouble spots can be mitigated or eliminated if line and support staff work together to create a climate that promotes teamwork.

Theoretically, every manager or supervisor is in a line relationship to his or her subordinates and all subordinates are in a staff relationship to their superiors. They illustrate this relationship functionally when they hold "staff meetings." In the same sense, managers can also act as "staff" to other team members, providing advice and recommendations. Identifying line and staff roles in any of these situations will depend on who is accountable for achieving the final end results.

DEFINING EXPECTATIONS

Line and staff support groups can work together effectively when expectations are clearly defined and communicated. How do you ensure that expected results are achieved? First, you must define the results that are expected. Providing subordinates and staff with a clear understanding of your expectations is positive people management.

There is an important parallel here between working with the people inside your organization and negotiating with an outside vendor. To assure delivery from an outside supplier of the right product, at the right time, and at the right price, you would first discuss your needs and expectations and then negotiate a contract based on the supplier's capabilities. A subordinate is, in essence, an inside vendor, a sub-contractor. The same pattern of negotiation can be used between line and support staff so that expectations are clearly understood. Staff members need to know what is expected of them, just as outside vendors do. The line is responsible for identifying their requirements to staff. What information is needed? Which reports? How often?

What then, is the function of staff? Staff provides analysis, research, counsel, assistance, technical support, maintenance, monitoring and evaluation that cannot be accomplished efficiently by the line. Entire departments often perform staff support functions, accounting or maintenance, for example. These departments occupy an ongoing, continuing staff relationship to the line.

The line, on the other hand, has the decision-making authority necessary to achieve the goals for which the line is accountable. Staff provides advice, counsel and service to help line achieve those goals. The line must be open and receptive, but has the right to refuse recommendations and advice. Because of this, staff members know they are performing well when their advice is accepted and it leads to achievement of line results. Both line and staff have the right of appeal to a common superior when authority is disputed or when overall results are seriously affected.

TYPES OF STAFF FUNCTIONS

There are three basic types of staff: personal, specialized, and service.

Personal staff

Comprised of individuals acting in a service capacity to one superior, such as the assistant to the president. Its assignments may be very specialized or may include general troubleshooting for the line manager.

Specialized staff

Members provide expert advice and assistance to managers who lack knowledge or technical ability on a particular subject. The accounting and personnel departments are examples of specialized staff who offer advice to line managers. In a pure line-staff relation, the managers are free to accept or reject the counsel. The degree of authority granted to specialized staff can vary widely, ranging from pure advice and counsel to the right to give orders directly to those over whom they have no line authority. This is where most of the conflicts arise. Staff often attempts to achieve their own agendas by implying "the boss wants this." Further, top management often uses staff to communicate decisions that are their responsibility. While this may expedite action, it causes confusion.

Service staff

Provides focused attention to a phase of operations that a line manager might not have the time, special skills or equipment to oversee adequately. Also, efficiencies can be achieved if the services in question are provided from one organizational element that can be staffed with specialized employees and supplied with the necessary equipment. IT, maintenance, and even engineering departments in a firm can be examples of service groups.

Many service departments are not strictly advisory; at times, it is mandatory to use their services, for example, when it has been stipulated that the service organization

must repair all product. A maintenance department can be strictly advisory in some instances; a recommended routine maintenance schedule is an example. Similarly, many staff units provide some services besides their chief, advisory function.

For the sake of clarification, one can classify a department as either staff, service, or support depending on its most customary activity. If the department usually offers expert opinions as opposed to services, it is classified staff. On the other hand, if its main activities are service-related, with only occasional advice-giving, it is considered a support function.

THE NEEDS OF STAFF AND LINE

How important is it for line managers to adopt effective staff relationships? What impact does it have on productivity? One way to evaluate is to monitor the impact of management behaviors which are not effective. For example, how is staff affected when a line manager does not define goals, ignores the staff's point of view, fails to give recognition and feedback, and publicly criticizes staff or support groups? Generally the result is insecurity, frustration, anger and resentment. When these feelings predominate, staff performance can be impaired. If company goals are not shared, the staff may not care about achieving them. It may withhold its best effort or perhaps sabotage the efforts of the line manager.

By contrast, effective management behaviors generally produce more positive teamwork. Staff members have a right to understand their role within the organization. They want line managers to be clear and concise about expectations and provide recognition and feedback. Staff members want to be consulted in their areas of specialization and to be evaluated on their performance. In return, line managers need whole-hearted support from their staff people. They want to be kept informed and they want their point of view to be heard. They want enthusiastic participation in decision-making. They want their goals to be understood. And they want recognition. In short, line managers want from their support staff the same things the staff wants from the line.

SUMMARY

Just as in Roman times, it is efficient to have common services and technical expertise available for support to the line. We often have entire departments, such as accounting, IT, HR, QA, production control or maintenance, in staff or service positions to the line. These departments are in an ongoing, continuing staff relationship to the line.

Instead of focusing on the traditional roles (boss/subordinate) within an organization, place the focus on accountability and teamwork. Shared responsibility is the result of a common goal and a clear understanding of the interrelationship between functions. Staff members are consultants, not servants. They are advisors, not adversaries.

In summary:

- Line and staff originated as military terms and were adopted by business and other organizations. In the military, the combat officer is the line officer who is ultimately accountable for attaining the military objective. He has command authority and receives advice and service from staff officers.
- We use the terms line and staff to describe the different relationships people assume as they work together to accomplish results. The terms tell us who has the right to make the final decision (line) and who provides advice and service (staff).
- Line has command (decision-making) authority necessary to reach the goals for which line is accountable.
- Staff provides advice and service to help line in reaching goals.
- The person who has final, or command authority with respect to achieving business goals is in a line relationship to those goals.
- Line/staff relationships are not static. We play different roles as relationships change.
- Manager and other employees often act as staff to their peers, especially with the evolving cross-functional team structure.