1. <https://www.gallup.com/workplace/242192/mastering-matrix-management-age-agility.aspx>
2. <https://www.mckinsey.com/business-functions/organization/our-insights/revisiting-the-matrix-organization#>
3. <https://www.mckinsey.com/business-functions/organization/our-insights/the-helix-organization>
4. Summary from above links:

- Gallup analytics finds 84% of U.S. employees are matrixed to some extent

- matrix structures by themselves do not provide significant gains; must be implemented well

- *well implemented* matrix structures increase engagement

- Gallup also found keys to success are not just the structure and processes, but the quality of leadership: *relationship focused, egalitarian, collaborative*

- effective collaboration includes prioritizing clarity around roles and expectations, down to individual level (individual OKR's would help with this) as well as emphasizing purpose

- company culture that is customer focused is another related success factor

- McKinsey *Helix* model is a specific kind of matrix structure that they maintain is effective. It separates and prioritizes *capabilities management* and *value creation management.*

Company case studies

* [Nike](https://bizfluent.com/facts-6887850-nike-s-flat-organizational-structure.html)

[9 Types of Organizational Structures](https://blog.hubspot.com/marketing/team-structure-diagrams)

[Do You Have a Well-Designed Organization? (HBR)](https://hbr.org/2002/03/do-you-have-a-well-designed-organization?referral=03759&cm_vc=rr_item_page.bottom)

Particularly #6 and sidebar “How Units Connect”:

Some of the biggest organizational challenges involve coordination among units. In evaluating a design, you need to pay close heed to unit-to-unit links, which take six basic forms:

*Shared Know-How Links*

Sharing best practices, leveraging expertise in functional areas, pooling knowledge about how to succeed in specific geographic regions, or sharing product or market know-how

*Shared Tangible Resources Links*

Creating economies of scale and eliminating duplicated effort through the sharing of physical assets (such as an R&D lab) or resources (such as people)

*Pooled Negotiating Power Links*

Generating economies of scale or other benefits through common purchases or joint negotiation with stakeholders (such as customers, governments, and universities)

*Coordinated Strategies Links*

Aligning the strategies of two or more units by, for example, coordinating responses to a new competitor

*Vertical Integration Links*

Coordinating the flow of products or services from one unit to another in order to reduce inventory costs, enhance product development, increase capacity utilization, or improve market access

*New-Business Creation Links*

Fashioning new businesses by combining know-how from different units through teams, internal joint ventures, or other alliances