Leadership Under Extreme Conditions: A Human Resource Analysis of Ernest Shackleton's Expedition

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Abstract

This paper analyzes Sir Ernest Shackleton's leadership during the Imperial Trans-Antarctic Expedition through a human resource management lens, using the Investors in People framework. Despite the expedition's failure to achieve its original goals, Shackleton's people management became a historic example of leadership under extreme adversity. The analysis examines how leadership behaviours shaped the crew's risk posture, adaptive capacity, and exposure to both capability strengths and gaps under volatile conditions, identifying patterns without attributing causal influence to specific decisions. Findings reveal high maturity in sustaining morale, building trust, and providing emotional stability, yet highlight structural shortcomings in delegation, leadership development, transparency, and anticipatory capability-building. Shackleton's approach is portrayed as both robust and limited: emotionally intelligent and stabilizing, but highly centralized in ways that narrowed the team's option-set when conditions deteriorated. The paper concludes with actionable recommendations to strengthen empowerment, feedback culture, and transparency — offering insights into how organizations can build resilience and expand strategic options when operating in environments dominated by uncertainty.

Introduction

In 1911, Norwegian explorer Roald Amundsen reached the South Pole ahead of Britain's Robert Falcon Scott, who died in the attempt. It was a massive setback for the British, who had dominated the exploration world up to that point. Eager to restore their reputation, Sir Ernest Shackleton launched the *Imperial Trans-Antarctic Expedition* (ITAE) in 1914 with 27 other crew members, aiming to cross the continent from sea to sea. At the dawn of World War I, this ill-fated expedition marked the end of the great era of polar exploration.

More than a century later, Shackleton's expedition is widely studied as a case of crisis leadership and remains highly relevant in today's uncertain, rapidly changing world. Although the mission failed, he brought every crew member home alive, a testament to his remarkable physical, psychological, and organizational adaptability under extreme conditions.

This report uses Shackleton's expedition to explore how leadership behaviours shape a team's risk posture and adaptive capacity in environments dominated by uncertainty. To structure this analysis, the report uses the Investors in People (IiP) framework as an analytical lens, grouping observed behaviours across key people-management indicators to surface patterns that clarify how leadership decisions expand or constrain the range of viable options available under extreme conditions.

Background: Timeline of the Expedition

1914 – Departure Sir Ernest Shackleton set sail aboard the Endurance with 27 men, aiming to cross Antarctica from the Weddell Sea to the Ross Sea. The expedition departed London in August 1914, shortly after the outbreak of World War I.

January 1915 – Trapped in Ice While navigating the Weddell Sea, the Endurance became trapped in pack ice before ever reaching the continent. For months, Shackleton maintained morale through routine, optimism, and direct engagement with the crew to prevent psychological decline during prolonged immobility.

October–November 1915 – Leaving the Ship After being crushed by the ice, the Endurance sank on 21 November 1915. Shackleton ordered the men to establish Ocean Camp on the ice and reframed the mission, shifting the objective from exploration to survival. He led by example, sharing rations and hardships equally to reinforce solidarity and fairness.

April 1916 – The Open-Boat Journey As the ice broke apart, the crew launched three lifeboats and reached Elephant Island. Knowing rescue was unlikely, Shackleton selected five men to accompany him on an 800-mile journey across the stormy Southern Ocean in the 22-foot *James Caird* to reach the whaling stations of South Georgia, one of the most demanding small-boat voyages in recorded history.

May 1916 – Crossing South Georgia After two weeks at sea, Shackleton's team landed on South Georgia's uninhabited coast. Shackleton, Worsley, and Crean then trekked for 36 hours across the island's glaciers to reach help at Stromness Station without maps, rest, or modern navigational tools, a feat often described as one of the most remarkable emergency crossings ever attempted.

August 1916 – Rescue of the Crew Following several failed attempts blocked by sea ice, Shackleton finally rescued all 22 men stranded on Elephant Island on 30 August 1916. Every crew member survived after nearly two years of isolation.

1917 – Return to England The crew returned to England amid World War I. Though the expedition never achieved its geographic objective, Shackleton's leadership became a timeless model of resilience, morale management, and crisis navigation, cementing his place in the history of extreme environments.

Methodology

This paper uses the Investors in People (IiP) framework to structure the analysis of Shackleton's leadership and people practices during the Imperial Trans-Antarctic Expedition (1914–1917), organizing the evidence into clear themes that support a focused and coherent examination of his behavioural patterns. This approach is designed to translate historical events into contemporary organizational insights without overinterpreting the causal role of individual actions.

The framework is organized around three main pillars:

- **Leading** – how leaders inspire, motivate, and provide direction.
- **Supporting** – how people are empowered, involved, and trusted to perform.
- **Improving** – how the organization builds capability and continuously develops its people.

Each pillar includes a set of indicators described across five maturity levels:

- Not met
- Developed – in place and understood
- Established – engaging and activating
- Advanced – generating positive outcomes
- High-Performing – embedded and always improving

Shackleton's leadership behaviours and decisions are analyzed qualitatively against these indicators. Evidence is drawn from documented accounts by expedition members and biographical sources to classify Shackleton's organization (the Endurance crew) within each area based on observed behaviours. This structured approach provides a consistent lens for comparing historical actions with contemporary people-management standards, allowing behaviours to be examined systematically without implying causal links between decisions and outcomes. The goal is to extract broader insights about leadership practice under extreme uncertainty rather than to evaluate historical success or failure.

> All facts in this report are extracted from a series of books written by, or based upon the writings of, members of the expedition: (Alexander, 1998), (Fisher & Fisher, 1957), (Huntford, 1975), (Hurley, 1948), (Hussey, 1949), (Lansing, 1959), (Mill, 1923), (Orde-Lees, 1916), (Shackleton, 1919), (Smith, 2015), (Worsley, 1924) and (Worsley, 1931).

Findings and Analysis

Leading

Creating Transparency and Trust

The objectives of the ITAE were unambiguous and outcome-oriented: crossing Antarctica from the Weddell Sea to the Ross Sea, documenting the journey, and restoring Britain's polar prestige (The Times, 29 December 1913).

Shackleton reinforced this clarity by consistently providing a coherent vision to his crew, from recruitment onward. Even if his famous newspaper advertisement is likely apocryphal, it captures the ethos associated with his approach: "*Men wanted for hazardous journey. Low wages, bitter cold, long hours of complete darkness. Safe return doubtful. Honour and recognition in event of success*" (Watkins, 1949). Shackleton received many applications and deliberately filtered out the "mad" and "hopeless" applicants who did not fit the culture he intended to build. His communication grew even more explicit as conditions deteriorated, and when it became obvious the expedition had shifted from exploration to survival, Shackleton recast the mission's purpose with equal unambiguity: return to civilization alive.

Trust-building came primarily through Shackleton's personal engagement. He spoke individually with crew members, showed genuine interest in their strengths, and consistently placed their welfare above his own. This behaviour contributed to a strong pattern of trust and loyalty. As Worsley later wrote in 1931, "*We would have gone anywhere with him without question just on his order*." Such devotion aligns with a cumulative pattern of relational leadership grounded in credibility, fairness, and emotional awareness.

This reservoir of trust was reflected in the crew's behaviour. They accepted high-risk decisions with remarkable confidence — such as sliding down a South Georgia slope in the cold and dark — interpreting reassurance, competence, and benevolence from Shackleton's earlier actions. The crew's later willingness to rejoin him on subsequent expeditions further illustrates the depth and durability of this trust capital.

From a human-resource perspective, within the IiP framework, these behaviours show characteristics of the **High-Performing** level in how clarity, consistency, and relational reliability were handled.

Motivating People to Deliver the Organization's Objectives

Shackleton recruited most of his men within minutes of meeting them, so it is unlikely that the crew began the expedition with an in-depth understanding of the mission's objectives. However, once on board, he compensated for this initial gap by communicating goals clearly and ensuring the crew understood what they needed to do to achieve them. For instance, the men immediately jumped overboard with picks and shovels when a crack appeared in the ice, enlarging it to free the ship and reach open water. They also recognized the lifeboats as their "*ultimate salvation*", demonstrating alignment between stated purpose and operational behaviour.

A distinctive strength of Shackleton's approach was his systematic reliance on observable evidence. He routinely measured distances, calculated food requirements, and adjusted course accordingly, modelling a literal version of the PDCA (Plan–Do–Check–Adjust) cycle. This rational framing appears to have reduced ambiguity and contributed to shared confidence in the continuity of the plan, even under extreme uncertainty.

Shackleton also motivated his team by addressing their fundamental needs: physiological, safety, love and self-esteem (Maslow, 1943). He recognized that in a survival context, psychological regulation was a prerequisite for physical endurance. His practice of serving hot meals whenever a man showed signs of weakness, without revealing who was struggling, preserved dignity and was consistently associated with restored morale. When the ship was abandoned, Shackleton managed the emotional transition with equal care: raising awareness, easing acceptance, reducing anxiety by stepping beyond his formal role, and providing reassurance through constant presence and optimism. Eventually, the crew internalized and embraced their new mission of returning home by other means.

His influence extended beyond routine motivation. Through emotional containment, personal courage, and relentless optimism, he reinforced behaviours that sustained cohesion and endurance. The 36-hour crossing of South Georgia with two exhausted men — who followed him without complaint — illustrated the extent to which his credibility functioned as a behavioural anchor, shaping commitment even under acute strain. As Worsley wrote, they followed "*the example of [their] leader, [and] did [their] utmost to avoid any cause of annoyance*" (Worsley, 1924).

From a human-resource perspective, these behaviours show characteristics of the **High-Performing** level in how motivation and emotional support were handled.

Developing Leadership Capability

Frank Wild, Second in Command, carried a substantial share of operational tasks, and the crew trusted him deeply. However, when left in charge on Elephant Island, he revealed significant gaps in leadership and management capability. For example, he failed to gather sufficient food to prepare for the winter, relying on the continued presence of seals and penguins rather than establishing a contingency plan. When the animals migrated, tensions and stress rose among the men.

Similarly, Captain Frank Worsley, though highly skilled as a navigator, was often wild, erratic, and impulsive. Shackleton frequently felt the need to monitor him closely and eventually reduced his authority after an early episode where he failed to maintain discipline on the ship. Taken together, these cases illustrate a pattern: Shackleton relied heavily on strong personalities who excelled in narrow domains but lacked balanced managerial competence.

Line managers are crucial enablers of change (Paauwe et al., 2013), yet Shackleton did not invest in systematically cultivating their leadership capability or defining expectations for their roles. His deputies were chosen largely for character, loyalty, or narrative appeal rather than for demonstrated judgment, foresight, or people-management skill. This limited the emergence of distributed leadership, creating a dependency on Shackleton himself as the sole integrator and stabilizing force.

From a human-resources perspective, these behaviours exhibit characteristics of the **Not Met** level in the development of leadership capability: potential deputies were neither assessed nor prepared for leadership responsibilities, leaving gaps that became apparent as soon as Shackleton was not physically present.

Overall Performance Review

The behaviours observed for the *Leading* pillar show characteristics of the **Advanced** level within the IiP framework.

In a "High-performing" organization, managers would know precisely the extent to which they are expected to lead, manage, and develop their people. Shackleton's leadership excelled in clarity, motivation, and emotional stewardship, but the organization lacked the managerial infrastructure required for truly high-performing practice. In a well-developed system, leaders would recruit more capable managers and explicitly define expectations. These managers would demonstrate predictable, consistent behaviours, actively encourage feedback, and help prevent overreliance on a single figure to anchor the organization.

Supporting

Empowering People

Shackleton provided support and information so that his people could work effectively and develop their skills. For instance, when a seaman made a mistake while manoeuvring the ship and expected Shackleton to be furious, he quietly helped him correct the error and never mentioned the incident again. Shackleton understood that his men were learning, and dwelling on mistakes would only undermine confidence.

However, these behaviours only show characteristics of the **Developed** level in how autonomy, responsibility, and individual initiative were handled. Indeed, Shackleton was omnipresent on the ship and constantly requested updates, leaving little room for autonomy. In the rare cases where others took matters into their own hands, he often reprimanded them. For example, when Frank Hurley, the photographer, returned to the ship to retrieve negatives, Shackleton issued a severe scolding, even though handling films and photographs fell squarely within Hurley's responsibilities. Shackleton was similarly reluctant to delegate leadership tasks; he even refused to let others resolve issues while confined to his tent with acute sciatica.

This discomfort with independent action may be linked to Shackleton's military background and an era that placed less emphasis on participative leadership than today. It also reflects a leadership model built around personal vigilance rather than distributed responsibility, which restricted opportunities for initiative and limited broader ownership within the team.

Participating and Collaborating

A recurring pattern in Shackleton's approach was selective consultation with centralized decision authority. Wild, Worsley, and Hurley were regularly consulted on strategic decisions (Hurley was included in this "directive committee" largely so that Shackleton could keep an eye on him). Nevertheless, Shackleton consistently retained final authority and seldom integrated challenging perspectives. For instance, he ordered a march toward Paulet Island despite Worsley's strong objections, and later insisted on attempting another march even when sentiment among many crew members was divided.

With the broader crew, Shackleton often acted unilaterally, without consulting those directly affected. Despite whalers advising him to wait because of dangerous ice floes, he chose to depart for Antarctica without sharing this information—a decision that increased the group's risk exposure. He also ordered the killing of most animals during the journey, including the dogs and the carpenter's cat, a choice that generated substantial resentment and was experienced as emotionally destabilizing by several crew members.

Taken together, these behaviours indicate a consultation structure that was narrow in scope and weak in influence. Shackleton sought input selectively, but did not create conditions in which alternative viewpoints could meaningfully shape decisions. From an IiP perspective, these behaviours show characteristics of the **Developed** level: consultation occurred, but participation remained restricted, and dissent was neither integrated nor valued as a source of adaptive insight.

Making Decisions

Decision-making on the expedition exhibited a pattern of delegated execution paired with concentrated control. During the expedition, Shackleton repeatedly gave his people responsibilities. On "Ocean Camp", he divided the crew into five tents. He put people of strong character in charge and trusted them to ensure discipline and maintain high morale. Also, when he had to depart Elephant Island, he left Wild in charge of watching his interests "*on [their] return to England,*" saying that he had "*every confidence in [him]*" (Lansing, 1959). He similarly asked Hurley to take full responsibility for managing the films and negatives. Yet although he distributed tasks, he did not involve others in defining the scope or limits of their authority, and he did not always adhere to the boundaries of the roles he assigned.

However, Shackleton was also consistently reluctant to share information that would have enabled more informed collective judgment. As discussed above, he withheld the whalers' warnings about ice conditions and downplayed the seriousness of the ship's entrapment. These behaviours reduced the crew's access to the reasoning, risk assessments, and uncertainties underlying his decisions, even when greater openness might have supported better collective judgement.

He also closely monitored those who challenged him, limiting their ability to express dissent. After McNeish (the carpenter) confronted him, Shackleton deliberately distanced him from the group. This pattern was systemic: on Elephant Island, Orde-Lees (skier and motor expert from the Navy) grew increasingly frustrated as Wild routinely dismissed his suggestions (Orde-Lees, 1916). By suppressing contrary views rather than providing channels for constructive challenge, Shackleton curtailed the team's access to alternative perspectives at moments when adaptation required broader input.

These behaviours show characteristics of the **Developed** level in how judgment, information sharing, and critical challenge were handled in practice. Shackleton enabled others to act within tightly defined responsibilities, but his reluctance to share information and tendency to marginalize opposing viewpoints diminished the crew's ability to contribute meaningfully to high-stakes decisions.

Overall Performance Review

Taken together, the behaviours observed for the *Supporting* pillar show characteristics of the **Developed** level within the IiP framework. Shackleton created a stable and supportive environment, but he did not establish the conditions for shared decision-making or constructive challenge. Autonomy remained extremely limited, questioning was often suppressed, and information flow was tightly controlled.

In a better-performing organization, people would take the lead without being perceived as rebels. Shackleton would be more transparent, involve everyone on the ship, and listen to what they have to say. Independent-minded individuals would be treated as contributors to insight and innovation rather than being marginalized. Such practices would strengthen collective judgement, reduce the risks associated with over-centralized authority, and broaden the team's capacity to respond to emerging challenges.

Improving Capabilities

Understanding People's Potential

According to Orde-Lees, Shackleton "*[knew] one's limitation better than one [did] oneself*" (Orde-Lees, 1914). However, this intuitive insight did not translate into a systematic assessment of skills or future capability needs, which limited the organization's preparedness for the demands of the journey. For example, crossing Antarctica would have required competence in skiing and dog-sled travel, yet the crew received no training in either area before departure — a fact that greatly surprised Orde-Lees, the only competent skier among the crew. Even if they had reached land, their chances of achieving rapid overland travel would have been severely reduced. Such omissions reveal a deeper gap: Shackleton diagnosed strengths informally, but did not translate mission requirements into explicit capability expectations.

These behaviours show characteristics of the **Not Met** level in how people's potential was understood, assessed, and anticipated.

Supporting Learning and Development

Throughout the journey, Shackleton ensured that idle time was productive and sought to make the most of challenging conditions. As a result, the crew gradually began to function as a learning organization, experimenting and transforming experience into knowledge (Senge, 1990). They eventually learned how to drive dog sleds, which proved crucial for moving gear and boats on the ice, and developed their hunting skills, which were essential for their survival in harsh conditions.

However, these learning efforts emerged reactively in response to immediate pressures, rather than a deliberate capability-building strategy. Had the expedition unfolded as intended, the crew would have reached land lacking the technical skills required for efficient overland travel, revealing a dependence on improvisation rather than anticipatory preparation.

From a human-resource perspective, these behaviours show characteristics of the **Established** level in how learning and development were supported: the organization adapted effectively in the moment but lacked mechanisms to identify future requirements, plan skill acquisition, and link development to longer-term objectives.

Deploying the Right People at the Right Time

Shackleton demonstrated a strong intuitive grasp of his men's strengths and routinely relied on personal knowledge to allocate responsibilities. When unexpected challenges arose, he quickly and effectively reassigned roles. For example, he selected McNish, the carpenter, to join the *James Caird* because of his seamanship, and relied on Hurley's improvisational skills to repair and adapt equipment with minimal tools. These choices reflect an ability to reconfigure available capabilities under rapidly shifting conditions, a key feature of dynamic capability (Teece et al., 1997).

However, the team's overall capability profile was formed and bounded by earlier omissions in skill development and recruitment, which narrowed the range of possible deployments in the first place. For instance, the absence of an experienced dog driver meant Shackleton could not draw on specialized skills when efficient over-ice travel became critical. As a result, even well-judged deployment decisions operated within a reduced option-set defined by gaps that had not been anticipated or addressed upstream.

From a human-resources perspective, these behaviours show characteristics of the **Established** level in how people were deployed: Shackleton adapted assignments effectively and responded quickly to situational demands, but the organization lacked the deeper capability base required to deploy the right person for the right role consistently.

Overall Performance Review

The overall performance level for this *Improving* pillar shows characteristics of the **Developed** level within the IiP framework. Shackleton enabled learning and made effective use of individual strengths in the moment, but capability development remained largely reactive, emerging from necessity rather than design.

A better-performing organization would have anticipated capability needs earlier, provided structured opportunities to build the skills required for its strategic objectives, and established clearer mechanisms for diagnosing gaps before they became constraints. It would also have aligned recruitment, development, and deployment so that people were prepared not only for immediate tasks but for the broader set of challenges inherent to the mission.

Discussion

Popular accounts of Shackleton's expedition often portray him as a hero, emphasizing his courage and humanity while overlooking the mission's complete operational failure. This narrative focus can obscure the underlying organizational patterns that shaped the crew's experience. Applying the Investors in People framework offers a structured way to examine these behaviours, distinguishing evidence from interpretation and enabling a clearer view of how leadership practices operated under extreme uncertainty.

The analysis highlights several consistent patterns: Shackleton excelled at sustaining morale, building trust, and providing emotional stability in crisis, reinforcing the crew's resilience and cohesion under shifting conditions. At the same time, it exposed structural limitations within the organization, particularly in terms of leadership development and delegation. Decision-making remained highly centralized, and feedback from subordinates was limited. These findings suggest that while Shackleton excelled at personal influence, his approach reinforced reliance on his judgment and narrowed the diversity of available perspectives for adaptation.

These dynamics also illustrate how leadership choices influence a team's exposure to risk. Preparation for known challenges, such as skiing, dog handling, or navigating ice floes, was inconsistent, reducing the organization's ability to draw on specialized capability at critical moments. In contrast, Shackleton's emphasis on character, stamina, and psychological resilience increased the team's ability to absorb shocks once the crisis began. He also positioned the team to benefit from asymmetric bets, such as the open-boat voyage to South Georgia, where the downside was limited, but the potential upside was transformative. In this sense, his decisions enhanced certain forms of robustness while constraining the set of options available for dealing with technical or environmental volatility.

These patterns did not deterministically dictate the expedition's fate, but they framed the conditions under which decisions were made, influencing what remained possible once circumstances deteriorated. In settings dominated by uncertainty, improvisation and resilience can sustain a team for long periods, but they cannot replace the broader option-set created through foresight, preparation, and more distributed capability.

Recommendations

Shackleton was a leader who could get people out of trouble in an extraordinary way. Every person who worked with him praised his leadership, and many contemporaneous accounts credit his conduct as a decisive factor in the crew's survival. However, his limited transparency and uneven anticipation of future needs reduced the organization's preparedness in key areas and exposed the team to capability gaps as conditions evolved. He acted like an overprotective father who genuinely wanted to take care of his children but believed he always knew best, leaving them unprepared to be on their own.

The following graph summarizes the organization's maturity levels across the three IiP pillars.

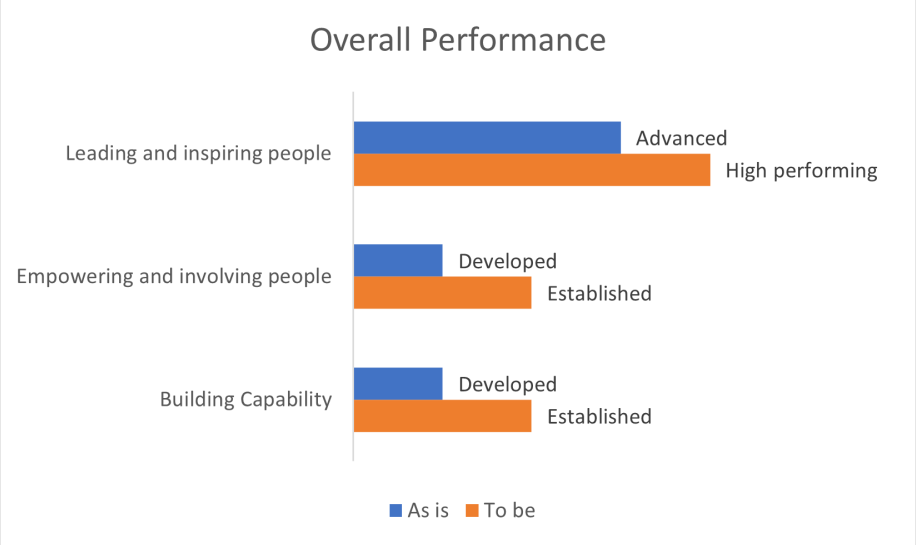

Figure 1: Organization's overall performance

This section proposes recommendations based on the observed patterns, identifying ways the organization could strengthen its people-management capability, build resilience, and improve its overall risk posture across the IiP pillars.

Leading by Example

During this expedition, the organization faced rapidly changing situations. Shackleton played a crucial role in sustaining momentum and focus by maintaining high levels of energy, visibility, and emotional steadiness throughout the process (CIPD | Change Management, 2018). Research also shows that leaders who model creative and adaptive behaviour make themselves "*available for creative emulation, which in turn produces more creativity in followers*" (Jaussi & Dionne, 2003). Maintaining these behaviours would reinforce confidence and stability, particularly when external conditions deteriorate faster than plans can adjust, helping the organization preserve a wider set of viable responses.

Implementing a No Blame Culture

The crew functions as a high-reliability organization (HRO), where any error "*could lead to the destruction of the organization*" (Roberts, 1990) and thus requires "*nearly error-free operations all the time*" (Weick & Roberts, 1993). In such environments, adopting a structured "no-blame" approach strengthens psychological safety, creating an "*atmosphere of trust in which people are encouraged, even rewarded, for providing essential safety-related information*" (Reason, 1997). Research shows that HROs implementing this kind of culture improve communication quality, increase knowledge sharing, and enhance preparedness for unexpected events (Provera, Montefusco, & Canato, 2010). Embedding such a culture would expand the organization's sensitivity to weak signals and emerging risks.

Encouraging Feedback

Shackleton did his best to mute the voices of people who disagreed with him. This pattern limited the organization's ability to draw on diverse viewpoints and weakened collective judgment in high-stakes situations. (Gratton, 2011) emphasizes that open innovation is key for organizations seeking to develop effective and adaptive strategies. It requires creating space for people at every level to contribute to strategic discussions and challenge assumptions.

Encouraging dissenting views and incorporating diverse contributions enables the organization to discover more innovative ways to achieve its objectives. Fostering a culture where participation is encouraged and constructive challenge is treated as information rather than disruption supports creativity and continuous improvement (Robinson, 2001). Over time, a more inclusive decision environment would reduce dependence on a single leader's intuition and allow the organization to operate as a learning system in which collective intelligence consistently exceeds individual contributions (Senge, 1990).

Increasing Transparency

This report highlighted that Shackleton lacked openness and transparency in sharing relevant information and his reasoning. Research shows that transparent leadership can encourage original problem-solving and strengthen alignment by giving people access to the rationale behind decisions (Yi et al., 2016). Sharing information, explaining decisions, and expressing genuine concerns or uncertainties fosters clearer understanding and reinforces trust.

Moreover, (Gratton, 2011) notes that participation creates greater value when employees have access to rich and accurate data, including information that leaders might usually withhold. Greater transparency would allow people to anticipate challenges earlier, calibrate their efforts more effectively, and contribute more meaningfully to collective decision-making, broadening the range of informed responses available when conditions shift.

Identifying Future Needs

Shackleton communicated extensively with his crew and developed a strong understanding of them as individuals, a practice that reinforced cohesion and allowed some adaptability. However, he did not systematically assess the organization's future capability requirements, which limited his ability to proactively prepare people for emerging demands or align development with longer-term objectives. The recruitment process also tended to favour character over role-critical expertise, creating notable capability gaps at key moments.

Tools such as an ESTEMPLE analysis can help identify future capability needs in a structured way, enabling leaders to define the skills required, recruit accordingly, and design development efforts that prepare people for both expected and volatile conditions. A forward-looking assessment practice would strengthen readiness while reducing avoidable dependence on improvisation.

Delegating

Evidence has shown that Shackleton sometimes struggled to delegate, particularly in matters involving leadership or strategic judgment. Greater empowerment and autonomy would have enabled his people to take ownership and develop the capability needed for complex, high-stakes situations. For instance, assigning full responsibility for implementing certain decisions to other crew members could have strengthened both competence and confidence across the team, broadening the set of options available when difficulties arose. Research also indicates a positive relationship between delegation and "*both idea generation and application behaviour*" (de Jong & Den Hartog, 2007), underscoring how shared responsibility strengthens adaptability and innovation. Building broader decision authority would also reduce bottlenecks caused by over-centralized control.

Summary

The figure and table below summarize the key recommendations, outlining their estimated implementation effort, potential organizational impact, and the IiP indicators they support. Together, they offer a structured basis for prioritizing interventions that enhance people-management capability and strengthen organizational resilience.

Figure 2: Recommendations ROI

#	Recommendation	Relevant indicator
1	Implementing a “no blame” culture	Supporting
2	Encouraging and valuing feedback	Supporting
3	Sharing all relevant information	Supporting
4	Sharing true feelings	Leading
5	Identifying future needs	Improving
6	Recruiting competent and relevant people	Improving
7	Delegating the implementation of decisions	Supporting

Conclusion

This analysis of Sir Ernest Shackleton's leadership through the Investors in People framework highlights both his extraordinary strengths and organizational shortcomings. Shackleton demonstrated exceptional emotional intelligence, communication, and courage, successfully maintaining morale and cohesion under life-threatening conditions. However, his leadership was also highly centralized and reactive, with limited delegation, transparency, and strategic foresight. These patterns curtailed the crew's autonomy and learning capacity, illustrating the organizational limits of a model that depends on individual heroism rather than more distributed capability.

Shackleton's legacy endures as a lesson in balancing inspiration with empowerment. Effective leadership requires not only guiding people through crises but also preparing them for independence, adaptation, and change. His example shows that resilience and empathy must be complemented by openness, collaboration, and long-term capability-building to create organizations that grow stronger under pressure, broadening the range of favourable options available when conditions shift rather than merely surviving.

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