



# In Sync: Unlocking Collective Action in a Connected World

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*“You didn’t see me on television, you didn’t see news stories about me. The kind of role that I tried to play was to pick up pieces or put together pieces out of which I hoped organization might come.”*

— *Ella Baker*

Civil rights leader Ella Baker was famous for eschewing monolithic top-down approaches, preferring to work behind the scenes to effect change, building on or combining existing efforts and engaging with the broadest set of stakeholders. To mobilize the vote, for example, she prodded civil rights activists to go beyond inspirational speeches and

assemble all the “pieces” required, such as voter identification, education, and transportation.

Organizations (civil and commercial alike) frequently struggle against internal and external inertia, complexity, distraction, and fractiousness to get things done. Civil society often sees business as a paragon of discipline, with its emphasis on goals, measurement, efficiency, and accountability, and looks to it for lessons in how to effect action. But for today’s complex, dynamic, multiple-stakeholder problems, business also has much to learn from social activism.

Multidimensional matrix structures, excessive layers, complex procedures, competing agendas, and internal politics can all scupper the execution of apparently robust plans. Indeed, an explicit objective of many organizational transformation programs is to remove such barriers to execution. But merely removing barriers is not enough to bring about change—as anyone who has witnessed the failure of a high-profile initiative can attest. In large organizations and societies, enacting change requires many people to synchronize new beliefs and behaviors. Because it is difficult to know what will motivate diverse individuals to act differently, and to predict the collective result when they do so, traditional linear approaches to change often fail.

In theory, digital technology should make things easier by increasing the reach, speed, and ease of communication. In practice, however, we see the same failures of collective action in digital contexts. With business and societal challenges **increasing the need for synchronized change**, it is important for leaders to understand how to make collective action work in an increasingly connected world.

## **THE LIMITS OF PROJECT MANAGEMENT**

Traditional project management applies **a classical approach** to problem-solving. Large problems are divided into smaller ones, on the assumption that the sum of the solutions to the parts will constitute an overall fix. These smaller problems are solved by collecting pertinent facts, analyzing root causes, identifying logical solutions, and encapsulating them in durable plans. The main challenges then become removing obstacles to change (such as complex processes or structures) and managing implementation in a disciplined

fashion. This is done by setting clear, quantifiable goals; creating plans that cascade down to specific actions; assigning organizational accountability for each part of the plan; and tracking implementation and impact using key performance metrics.

This familiar approach is well suited to challenges that can be decomposed, solved analytically, and executed within a single organization, such as streamlining a production process, reducing costs, or reorganizing. However, **many problems are more complex**, such as those involving changing contexts, interdependencies between various elements, diverse agents, or a scope that reaches beyond the boundaries of an organization.

Problems are often not decomposable: if we break them down and solve for each part, the result may not constitute an overall solution. And they are often not analytically tractable, because in a complex system, any one action potentially changes other agents' perceptions and actions. As a result, interventions cannot be boiled down to an unchanging set of simple instructions. Furthermore, even if we could identify the ideal solution, merely broadcasting it to participants might not motivate them to act, or to do so in a coordinated and effective manner. This problem is exacerbated when coordination must extend beyond a single organization and influence and control are diluted. For example, we know that reducing carbon emissions is required to slow or reverse global warming, and we know with some precision what each country, industry, and individual would need to do to achieve this, **yet we are still seemingly unable to mobilize collective action**. (Paradoxically, our biggest success in reducing emissions to date has been as an unintended side effect of dealing with COVID-19.)

Therefore, we must broaden our approach beyond traditional project management. And to do that we need to look to other domains where collective action is required, such as social activism.

## **REQUIREMENTS FOR EFFECTIVE COLLECTIVE ACTION**

Sociologist Charles Tilly proposed that to be effective, a social movement must exhibit four key characteristics: its proponents must see the cause as **worthy**, they must be **united** in their stance, they must be sufficiently **numerous** to make a difference, and they must be **committed** to making change happen.<sup>1</sup> To this, others have added that the proponents

must have sufficient **diversity** for the cause to be of broad appeal.<sup>2</sup> This is not the only framework for looking at collective action, but it has the merits of being easily applicable, focusing on the social dimension of action, going beyond narrow economic considerations, and being readily applicable to both corporate and social contexts.

The framework immediately helps us understand some ways in which collective change initiatives often fail:

**Failures of Worthiness.** A cause must be seen as worthwhile by those who would join it, but perceived worthiness can be undermined in several ways.

- **Triviality.** If an initiative is seen as insignificant in comparison with competing causes or with individual aspirations, it is unlikely to create engagement. In business parlance, the ultimate purpose of the cause must be articulated, not just the actions associated with it. Today's employees increasingly seek not only economic security but also personal meaning in work, so if an initiative does not contribute to the greater good or help them realize personal aspirations and values—or if this deeper purpose is not articulated clearly—it will not be compelling. For example, a cost-cutting effort may not be seen as worthwhile unless it is paired with a clear vision of how it will help serve the firm's economic and social purpose.
- **Instrumentalism.** Almost every issue in business today has some political aspect, which means that intentions will be closely scrutinized. If a cause is perceived as being merely a convenient pretext for personal gain or some other ulterior motive, then it is unlikely to gather support. In a corporate context, people can be compelled to act through hierarchical authority, but grudging compliance will likely not create lasting commitment or effective change. Furthermore, corporations increasingly need to deploy influence beyond the boundaries of their organizations to shape their economic and social context. Moreover, one should expect that messages may be deliberately co-opted and distorted by others, requiring constant reiteration and clarification. As former president of Colombia, Juan Manuel Santos, confided in us, “Although we were ultimately successful, one of our major missteps in driving the peace process was hesitancy in reiterating our message, and naivety in underestimating the extent to which it would be deliberately distorted by others.”

**Failures of Unity.** If proponents do not speak and act in unity, they may send mixed messages and undermine the ability to gain support from a wider constituency.

- **Private Inconsistency.** In public, leaders will usually manage to present a common front, but the true degree of unity will be judged from private interactions. Confiding dissenting opinions to others in private may establish individual trust, but it comes at the expense of public trust in the initiative. Duplicity can undermine an initiative from the outset, although this may not be obvious from official discussions and representations.
- **Misaligned Mental Models.** Members of a successful cause need to be committed not only to a course of action but also to a common purpose and a common mental model of how intended actions will result in the desired change. Otherwise, the cause is susceptible to “working in practice but not in theory,” as Ben Bernanke famously quipped. This may not seem like a problem at first, but over time it is likely that new actions will be required as new challenges emerge, testing unity at a deeper level. This raises what philosophers call the intersubjectivity problem (How do I know that you are thinking what I am thinking?), which can be addressed by being explicit and precise about mental models, goals, and assumptions. For example, decarbonization efforts may be challenged by differing implicit assumptions regarding the acceptability of nuclear power as an alternative.

**Failures of Number.** If a cause does not reach sufficient scale—or, in the early stages, if participants do not believe that it can—it will not succeed.

- **Narrowness.** Causes that are too narrow to address a broad common interest will fail to gather scale. Often a cause may be part of a larger cause with broader appeal, so sometimes a new initiative is best folded into a broader one.
- **Proliferation.** The larger the number of causes, the less likely that any one cause will gain critical mass. It’s common for every change champion to assume that a new, unique initiative is required to fulfill their goals. While less egotistically satisfying, sometimes it is better to follow Ella Baker’s injunction to build on an existing initiative rather than start a new one. The proliferation misstep can be seen in

initiatives to set standards for sustainable forestry—many competing standards are each supported by a subset of stakeholders, without any one gaining critical mass.

**Failures of Commitment.** Change inevitably faces many obstacles, and without sustained commitment and the appearance of commitment, an initiative is unlikely to endure and succeed.

- **Lack of Persistence.** Although leaders must generally maintain some flexibility in pursuing their goals, showing too much readiness to compromise or move onto the next initiative will undermine perceived commitment and others' willingness to enlist. Enthusiasm flows naturally with the excitement and novelty of a new initiative; the truer test of commitment is when **novelty has worn off, ennui has set in, and progress has stalled**. Declaring victory too soon on the basis of one or two completed actions can also stunt a movement's impact.
- **Cheap Signals.** A vociferous commitment is not necessarily a lasting or convincing one. Words are cheap, and commitment is better demonstrated by signals that require more sacrifice from those doing the signaling. For example, many leaders endorsed the recent Business Roundtable initiative for businesses to serve a broad set of stakeholders, but companies have differed greatly in the extent to which they have backed this up with actions in areas like environmental and labor rights<sup>3</sup>. "Statements" might help build initial momentum, but they don't necessarily signal a willingness or ability to work through the toughest and most critical aspects of a problem. An example of a credible signal is the voluntary withdrawal of tobacco from CVS stores, in line with the company's purpose of promoting health. It cost CVS billions of dollars in lost revenues before eventually spurring new health-related growth.
- **Actionism.** Organizations can overemphasize being action-oriented and invest heavily in the machinery and language of action—including Gantt charts, milestones, project teams, performance metrics, pulse checks, steering committees, and project charters—which can sometimes have the unintended effect of deflecting attention

and energy away from taking on the toughest tasks. Busy does not necessarily mean effective.

**Failures of Diversity.** To be successful, a cause needs to demonstrate that it can eventually appeal to a broad audience, and that this ability can be inferred from the diversity of current adherents. Lack of diversity early on can undermine a movement.

- **Preaching to the Choir.** Causes can sometimes appear to be successful because they engage a relatively homogeneous audience that is already aligned on its core beliefs. For example, attendees at sustainability events often demonstrate an impressive degree of alignment and conviction. A more stringent test would be to attract the engagement and support of influencers who are disinterested or skeptical of the cause in question.
- **Preaching to the Leaders.** Proponents of an initiative may focus their efforts on winning over the top leaders, such as the C-suite, heads of state, or policy makers. However, employees or citizens at all levels will generally be the ones amplifying the message and implementing a change or feeling its effects, so if they are not also on board with an initiative, it is unlikely to succeed. Successful social movements mobilize grass roots as much as grass tops.

## **COLLECTIVE ACTION IN A DIGITAL WORLD**

Digital technology can transform many physical challenges into information problems, and in so doing greatly reduce the cost and effort necessary to create change. By leveraging technology, the following basic elements of collective change can all be executed more rapidly, at lower cost, with less delay, and to broader audiences:

- Creation of a change agenda
- Dissemination of agenda
- Coordination of collective action
- Tracking of collective impact

- Collective engagement to evolve the agenda
- Recruitment of new members

However, digital technology does not in itself solve the fundamental challenges of worthiness, unity, number, commitment, and diversity—in fact, it also creates several new challenges.

Lower transaction costs facilitate the proliferation of initiatives and communications, which dilutes the average worth of each and makes the challenge of breaking through the information clutter harder. For instance, online petitions have dramatically reduced the friction involved in collecting signatures, which in turn has lowered the perceived impact of individual petitions.

In a world focused more on screens than on interpersonal interactions, acts of digital speech can be easily mistaken for effective action and commitment. As journalist and author Tom Friedman has remarked, today’s digital activism may amount in many cases to little more than “firing digital muskets into the Milky Way.”

It’s certainly easy to reach a large number of followers on digital platforms. But this is counterbalanced by a lower likelihood of deep engagement. We should not mistake likes or clicks for self-initiated action or lasting commitment.

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And the network effects associated with technology are making the world a more polarized place, where affiliation is more tribal and mutual mistrust higher. This increases the risk of preaching only to the converted. While this may give the appearance of unity, it

can easily mask a lack of diversity. Most social media platforms prioritize content that is in line with preexisting interests, so many users are exposed only to content they agree with. As a result, they can believe that there is a high level of agreement with their opinions, even if they are marginal when viewed from a broader perspective.

## **UNLOCKING THE MYSTERY OF COLLECTIVE ACTION**

As corporations grow larger, as our digital reach expands, and as business activity encroaches upon social and planetary limits, our challenges are increasingly collective in nature. We cannot apply the convenient, mechanical recipe of “problem-analysis-plan-action” to such challenges. Effective collective action is not simply project management writ large or project management by digital means.

We don’t yet have a definitive playbook for effective collective action in an interconnected world, but we can derive some useful principles from social activism and systems science, as well as from observing the failure and success of complex change initiatives (See “Putting It All Together: 96 Elephants”):

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### **PUTTING IT ALL TOGETHER: 96 ELEPHANTS**

The Wildlife Conservation Society’s “96 Elephants” campaign is an example of a successful initiative that combines many of the elements discussed in this article. Faced with mounting pressure on elephant populations from poaching, the WCS launched the initiative, which was ultimately successful in closing down ivory markets in China and the US, with the active collaboration of both countries. The narrative of saving elephants from extinction was a highly vivid and worthwhile one to a broad audience—likely much more so than had WCS targeted poaching in general. The campaign focused on simple actions that citizens could take, like pledging not to buy ivory, writing letters to congressional representatives, or donating funds. One of the masterstrokes of the campaign was to position it as a bilateral issue on which US and China could show unity. The campaign was amplified to reach critical numbers by rolling out legislative precedents across states using templated laws, by promoting the cause to US citizens via WCS’s network of affiliate zoos, and by an official program of factory closures in China.

By working legal mechanisms, WCS could ensure that measures were enshrined in law. Another key aspect of the campaign was that it focused on uniting very diverse constituencies—from state legislators, to congressional representatives of both parties, to political leaders in China and the US, to African leaders, to regional conservation societies and ordinary citizens—in a synergistic manner. Finally, even as it leveraged some digital tools and approaches, WCS was not distracted from the fact that many of the key influence levers in this case—including the support of governors and politicians such as then Secretary of State Hillary Clinton in drafting legislation and diplomacy—were decidedly interpersonal. As WCS CEO Cristián Samper said, “Not everything we do comes together like this, but this was a focus initiative; we were all fully committed to seeing it through, and we worked the system from grass roots to grass tops to make sure that the highly diverse stakeholder set was fully united throughout.”

- 1. Make it easy for someone to act.** Instead of focusing mainly on decoding what actions logically need to take place, focus on motivating voluntary action taking. Understand what people must believe, and how they can be inspired, influenced, or incited to change their behaviors. Provide educational platforms, role models, mobile apps, and other support tools to enable people to easily take action toward the desired outcome. For example, the NationSwell Council, a community of service-minded leaders, engages members with “The One Thing” they can do to further a social initiative.
- 2. Convey the worth of your initiative by focusing on the purpose underpinning plans and goals.** A strongly supported purpose can function as an intrinsic motivator that drives self-initiated behaviors in a much more powerful way than extrinsic motivators.
- 3. To create unity, don’t just transmit information but tell stories.** Stories can be powerful tools that go beyond facts by creating holistic meaning, assimilability, familiarity, vividness, and emotional appeal. The most emotionally compelling stories include characters, memorable images, lessons, and a call to action.
- 4. Broaden the number of people who support you by building on preexistent initiatives.** This not only ensures that your initiative starts with a significant support base

but also allows you to leverage existing processes, communities, and resources where appropriate to accelerate impact.

**5. Communicate commitment by highlighting and celebrating examples of costly signals and pivotal actions.** Committing to goals publicly, putting skin in the game, and taking on the toughest challenges are costly but effective signals of commitment. In nonprofit organizations, the increasing levels of commitment can be made explicit, from being a member, to donating money/time, to advocating for policy change.

**6. Realize diversity in your support base early on.** Communicate with and enlist dissimilar people and skeptics. Create spaces in the agenda for people to add their adaptations consistent with the mission. This increases the chance that your initiative will reach critical mass without later running into resistance from groups with conflicting interests. It might also expand the initiative in creative ways you had not considered.

**7. Leverage the unique strengths of technology to sustain new forms of collective action.** Use technology to facilitate collective action, but regard it as a “force multiplier” rather than something that in itself guarantees success. There is no number of clicks or likes that will guarantee people act. And often the mechanisms of power—such as the legislative process—are decidedly nondigital.

For instance, technology drastically lowers friction for large-scale asynchronous collaboration, which has made initiatives like Wikipedia possible. The Wikimedia Foundation catalyzed collective action by developing a clear vision (creating a freely accessible, massively comprehensive encyclopedia) and making crowdsourcing collaboration tools widely available. Volunteers have leveraged these tools to create the largest and most accurate repository of freely available knowledge, through bottom-up action.

To help sustain movements over time, the knowledge of an organization’s history and outcomes can be archived, so present change agents build on their predecessors’ success instead of repeating the failures. Similarly, archiving can synchronize subcommunities of action.

**8. Lead for collective action.** There's no collective action without the right leadership. Effective collective action is not brought about by charisma alone, nor by compulsion, fear, or excellence in project management. The jobs to be done in orchestrating collective action include understanding and articulating a common purpose, understanding the mechanisms of power and the bottlenecks in a system, communicating in a persuasive manner to a diverse audience, persisting in the face of obstacles, and evolving approaches as circumstances change. These jobs are likely to demand different traits than those of the traditional top-down leader, such as humility, being comfortable in one's own skin, the ability to establish trust with a wide range of personalities, adaptability, integrity, and emotional intelligence. Effective leadership of collective action may also need different types of leadership profiles in the different stages of a movement or initiative.

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Change is becoming more incessant and complex, requiring new approaches that transcend traditional project management. By learning from social activism, especially its focus on creating and propagating the will to act, leaders can more effectively bring about change across a diverse set of stakeholders. In the words of Ella Baker, "The major job was getting people to understand that they had something within their power they could use."

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