THE AGE OF THE EXPERT IS HERE

MASTER EXPERT

HOW TO USE EXPERTSHIP TO ACHIEVE PEAK PERFORMANCE, SENIORITY AND INFLUENCE IN A TECHNICAL ROLE

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The Age of the Expert

EXPERTS ARE BECOMING MORE and more important to the organizations that employ them. Increasingly, we live in the Age of the Expert.

Most organizations rely on an increasing population of talented technical experts who do ever more specialized work. This work typically keeps the organizations functioning. In other words, the expert's work is *mission critical,* even though, for a considerable portion of the organization's workforce, their work is often invisible. Experts are increasingly at the epicenter of innovation and value creation in their organizations. If they aren't, they ought to be.

Ask any chief information officer, chief risk officer, head of engineering, or indeed the chief of any technical function, and they'll tell you that finding the right technical *experts* is extremely difficult and often very expensive. Thus, hanging on to the best experts and keeping them happy is imperative.

However, our research and our experience of working with many technical experts around the world shows that many experts are *not* happy.

Experts are often deployed in the same technical role for many years, roles that frequently become unchallenging and uninteresting for the expert over time. Experts are often constrained by their workload and the lack of understanding of their ability to add extra value—value they know they could create for their organization *if* they were given the chance. Experts often lack any semblance of a well-thought-out career path. People leaders have well-developed *leadership* pathways in most medium to large organizations, while experts typically have no *Expertship* pathways.

In short, many high-performing and high-potential experts are *career stuck*.

This book is all about helping experts in this predicament get unstuck.

It's about helping experts around the world achieve their aspirations, fulfill their very significant potential to make a difference, and find fulfillment, challenge and passion in their work.

It's a book that challenges expert readers to become Master Experts.

> *"Around the world, experts are not as happy at work as they should be."*

The Edward Predicament

EDWARD IS A BUSINESS analyst in a finance department and has been with his organization for seven years. Edward's job has constantly evolved over the years. He started out putting together accurate reports for divisional heads, but recently, he has been undertaking much more complex tactical and strategic financial analysis for these same stakeholders. Edward loves the analysis aspect of his work and wants to be in a position to be part of the conversation the wider organization has about what to do with the insights raised by the data he has collected and analyzed. He wants to be seen as a businessperson who is also a financial analyst, rather than being seen only as a financial analyst. Over the past two years, because of the quality of the work he's clearly capable of, these senior divisional heads have asked Edward to do more and more analysis, almost doubling his workload. Because he loves the work and believes it will lead to a more senior position, Edward has fulfilled all requests.

When we first met Edward, he had recently had his annual performance review with his manager, Alex. He told us that this annual review had been a mirror image of the six that had gone before. Alex had scored Edward a mid-level performance ranking (a "3", which is described as "meets expectations"). Given the quality of his work and the doubling of his workload, Edward is fuming about the rating. He argues that he delivers work far beyond his position description almost every week. He manages a far higher workload than his peers and is completed trusted by Alex to manage complex tasks. Edward believes, at a minimum, he should be scored a "4" ("exceeds expectations") or even a "5" ("significantly exceeds expectations").

Defining who experts are

Our definition of an expert is a knowledge worker who has a deep domain knowledge in a particular specialty. Many experts don't regard themselves as experts and feel uncomfortable being described as such, but that's how others think of us. We say "us" because the authors of this book are perceived to be experts in our field. We're experts on experts. All experts have knowledge in an important field and are generally highly respected for having such knowledge and experience by the wider organization. Experts hail from a very wide range of technical domains, such as science, law, engineering, marketing, medical, human resources, technology and so on. At first glance, these may seem like quite different knowledge domains with little in common, but first appearances are deceptive. Technical experts, regardless of their domain, have many things in common, as we will discover.

Edward tells us that the annual performance review is virtually the only performance conversation he has with his manager each year. He tells us that "Because I'm performing, because I work independently, because I cause no problems, because my stakeholders are happy with my work, because I am in fact a high performer and low maintenance, my manager focuses on putting fires out elsewhere, knowing he doesn't need to spend time on me." Edward reports that the review discussion centers around key performance indicators that were set at the beginning of the year, which are now out of date. Many more tasks and undertakings have been added, none of which are reflected in the structured process of the annual review. We hear this quite a lot from high-performing experts.

> *"Edward has come to believe he will never be promoted."*

When we ask Edward why he thinks Alex, his manager, only scores him a "3", Edward provides a number of theories. Firstly, he thinks that his manager doesn't really understand the complexity of the work he now completes on a day-to-day basis. Secondly, he believes his manager has virtually no visibility of the more complex and challenging work Edward does for senior business divisional leaders. Thirdly, given the first and second theories, Alex does not

really understand how Edward's skills and the value he adds have increased. Finally, Edward admits that he believes his manager is a little "old school" and that Alex scores almost all of his reports a "3", so Edward would need to do something extraordinary and very visible to get a higher rating. This is another sentiment we hear quite often from high-performing experts.

Most of the meetings Edward has with his manager are short, sharp, and task-related. The items Edward wants to discuss aren't on the agenda. These are:

- Why does he get allocated more and more work without either additional reward or any recognition?
- Why has he scored a mid-ranking rating when all of his senior stakeholders clearly have high confidence in Edward's abilities and potential by entrusting him with increasingly complex and important analysis?
- Why isn't Edward's career trajectory a topic of regular conversation?
- Why, in fact, does his manager show *no interest* in how Edward is feeling about his role or career path?

> *The Great Paradox of Experts: the more expert you are, the less likely you are seen to be capable of or available for greater responsibilities.*

When we ask him if he has raised these issues directly with his manager, Alex, he tells us that he does so repeatedly and that Alex promises to explore these issues soon, but he never does. Edward explains that Alex awkwardly ends these conversations as quickly as he can.

Edward has come to believe he will *never* be promoted.

He lists many reasons for this contention. Firstly, there is no obvious successor in place. He's the only person in the organization who does precisely what he does, which is a typical scenario for experts. Secondly, he feels he's taken for granted by his manager and the wider organization. He believes that everyone just assumes he has no ambition. "They think that because I enjoy the parts of the work that involve detail, I'm going to be happy to be a technical analyst for the rest of my career," he tells us. Thirdly, there is no defined career path for him unless he decides he wants to lead a team of people in the finance department. Edward isn't sure this is a path he wants to take, and since he's got no experience with leading people so far, he doubts he would ever be offered or entrusted with such a role.

He is *career stuck*.

Edward is highly ambitious. He's keen to progress to greater level of responsibility, a more fulfilling role, and he believes he's capable of adding significantly more strategic value to his stakeholders and the organization.

He wants to grow his influence and his income. He *knows* he can add so much more value to his organization. But he can't see a way forward. It would be fair to say that when we met Edward, he was extremely frustrated and considering his options. He believed that leaving the organization was possibly his only way out of his present predicament.

> *"The more brilliant the expert becomes, the more career stuck they can be."*

The Great Paradox of Experts

EDWARD'S SITUATION IS ALARMINGLY common. There are millions of experts around the world just like Edward. They're career stuck and feel they could add much more value if provided the opportunity.

And there are thousands of organizations that aren't getting the full organizational value from their experts that they could and should.

Edward is an example of what we call the *Great Paradox of Experts*. The more expert he becomes, the less likely it will be that he will be promoted to wider responsibilities. He's becoming increasingly difficult to replace and the organization grows more and more dependent on him in his *current* role. The last thing the organization wants is for anything to change. Edward is a technical star, and this is what the organization wants him to remain, regardless of what Edward wants.

This Great Paradox of Experts is something we have continuously encountered while working with experts. The more brilliant some experts are at their chosen specialty, the more career stuck they become. They have reached an apparently impervious *technical ceiling*.

> *"The next step is to invest in building mastery of enterprise skills."*

Typically, how experts tend to resolve this issue is in one of two ways. The first solution is they leave the organization, believing the only way to get promoted is at another enterprise. This is the *grass is greener on the other side of the fence* philosophy, which, of course, may or may not be true. The second solution is they stay at their current organization but become withdrawn, cynical, and increasingly unhappy.

Both of these resolutions are poor for the organization, as the experts become high maintenance and difficult to manage or have to be replaced. Neither one is necessarily the optimal resolution for the expert either.

But there is a *third way*, and that's why we have spent three years writing this book. Thousands of experts have already adopted this third way, often with outstanding personal and organizational rewards.

In order to break through these technical ceilings, experts need to change the way in which they think, operate and connect. Experts like Edward need to progress from performing at *Expert* level to what we describe in detail in this book as *Master Expert* level. Key transitions include:

- A shift from tactical support to strategic support.
- A shift from departmental focus to an organization-wide focus.
- Replacing jargon-filled communication with cut-through, plain-language messaging that everyone in the organization can understand.
- A shift from designing solutions for the now to designing solutions for the future.
- Replacing transactional stakeholder relationships with transformative stakeholder relationships.
- A shift from a reactive workload strategy to being proactive about which work is prioritized.
- Replacing a mostly internal focus with a much broader external focus.
- A shift from delivering ordinary value to their organization to delivering extraordinary value.

In short, they need to build their mastery of Expertship—the practice of being the very best expert they can be.

The Path to Expertship Mastery

THE PATH TO MASTERY is littered with gifts. Great fulfillment in the work we do as experts. Greater recognition of the value of the work we do. Greater influence over those who shape strategy and can provide funds and resources. Greater learning and less repetitive work. Greater challenge and greater achievement.

Mastery is achieved, that is, breaking through the technical ceiling is achieved, by simultaneously maintaining technical excellence and supplementing technical skills with *enterprise skills*. In many organizations, these are called "soft skills," but we don't like that name because there is nothing soft about them.

What are these enterprise skills? While we describe these in detail in Chapter 2, here is a brief overview. They include: advanced stakeholder management skills, elevated change agility skills, and best-in-class collaboration skills and techniques. Additionally, there are comprehensive

market context skills, which means understanding the complex environment in which our organization exists, advanced consulting skills, advanced influencing skills and strong commercial or community acumen.

In order to progress past being a technical analyst, Edward needs to learn this new set of skills that will help him leverage his technical abilities to a much greater extent. In order to contribute value to those business conversations, he needs to understand the business, his business colleagues, and his business's customers and competitors. In fact, until he masters this knowledge and these skills, he can't add great value.

Edward, as many experts have, has, up to this point in his career, mostly invested in building his technical skills. And he has done this brilliantly. The next step, however, is to invest in his enterprise skills.

Master Experts are masters of both sets of skills (see Figure 1.1), allowing them to escape the constraints of technical ceilings.
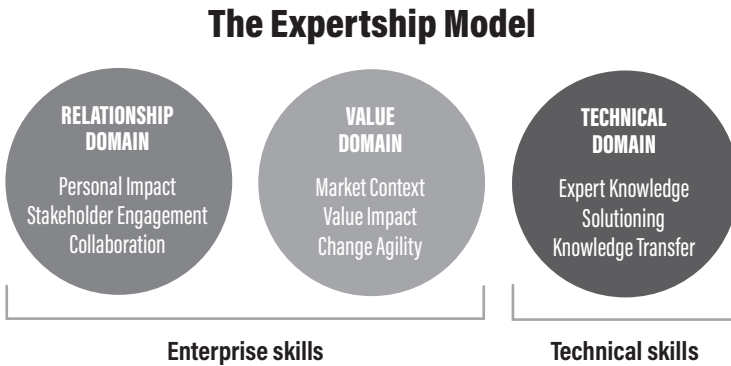
The Expertship Model

RELATIONSHIP DOMAIN
Personal Impact
Stakeholder Engagement
Collaboration

VALUE DOMAIN
Market Context
Value Impact
Change Agility

TECHNICAL DOMAIN
Expert Knowledge
Solutioning
Knowledge Transfer

Enterprise skills   Technical skills

FIGURE 1.1: Technical and Enterprise Expert Skills

Why Do Technical Ceilings Exist?

AS EXPERTS, WE MIGHT consider the existence of a technical ceiling as profoundly unfair and clearly someone else's fault—like Edward's manager, for example, or those folks in human resources.

Sadly, some of the blame lies at our door, however unwittingly. Experts can give off confusing signals that are misunderstood by the rest of the organization.

For example, experts are rarely seen by the rest of the organization as ambitious. This is because most experts don't aspire to be people leaders. In fact, many of the experts we work with couldn't imagine a more appalling role, filled with vacuous meetings and not getting work done. The problem

is that the definition of ambition in many organizations is defined by how rapidly you rise through the ranks and how many employees report to you. Executive potential is defined by the scope of control over employees rather than by the potential to add extraordinary value, which is the role many experts play or aspire to.

In a recent survey conducted by the authors, 87 percent of experts said they felt they could contribute more value at a more senior level if only they were given the opportunity to do so. Our experience in working with experts is that most are very frustrated that they lack the influence, authority, and resources to be able to transform productivity and enterprise capability. If experts lacked ambition, they wouldn't be frustrated.

To make matters worse, in many organizations, experts are typecast as people who lack the social or management skills to operate outside their own specialty or to fulfill senior roles within the organization. Many managers and human resources folk believe that experts are "not good with people," and some openly say so with irritating regularity.

These colleagues have formed this view based on observations over time, where they have seen experts favor cold hard facts and clinical analysis to the exclusion of relationship building and maintenance. But it's not that experts are inherently handicapped or lacking the skills to address this common shortfall. Experts are, in most cases, left-brained. Essentially, we're instinctively attracted to and focused on procedural, factual, detailed and rational content, which is often the very reason why experts are very good at certain aspects of their jobs.

> *"It's a trait of many experts that*
> *we love a good argument."*

Our experience is that once armed with the right tools and skills, experts can be brilliant at building high-value relationships with non-technical people across their organizations. They just need to be convinced that mastery of these skills is important and then understand how to master these skills.

Another strongly held view of experts is that they have poor collaboration skills. In other words, we aren't easy to work with. Well, in fairness, many of us aren't, but again, this isn't because somewhere in our DNA, someone decided we were born difficult. The majority of experts tend to be quite introverted. We're quiet and independent. We like working alone. And, because we're experts, we can see into the future and predict problems with the proposed solutions our colleagues bring to us. Combine these three factors and suddenly we can appear to be, without realizing it, a group of sullen, uncommunicative and difficult people.

One of the authors worked in a mobile applications development organization some years back. His experience of highly technical IT folk was completely different from the description above. In meetings, the designers and engineers were animated, passionate, and if anything, overly communicative. In fact, it's a trait of many experts that we all love a good argument. We value debate, the exchange of ideas, and possibly being found to be wrong because it leads to more learning. This team was very supportive of new ideas and solutions.

But often, this is a side of experts that only our own technical peers see. Experts can, when provided with the right environment, tools and motivation, be as effective at building relationships and displaying emotional intelligence as any of their non-technical colleagues in the organization.

A further damaging but popularly held perception is that experts care more about their profession than they do about their employer. In other words, when introducing themselves to others, they may be more inclined to identify as "I'm in IT" (or finance, or law) than "I work for XYZ organization."

Experts are hired by organizations for their expertise. But the more we use our expertise, the more it seems we can become distanced from the rest of the organization. We can be typecast as specialists because that's consistent with our behavior. We're accused of being unable to see the bigger picture because, in some instances, other people's interactions with us are only at the technical level. In some cases, of course, because we're so focused on the technical side of our role, this accusation of failing to see the big picture may be true.

> *"Many experts operate and interact with the organization almost entirely from a technical perspective."*

This image of experts becomes self-reinforcing. The organization sidelines us and, as a consequence, we feel unloved, unwanted, undervalued and taken for granted. So, we hang out with others who are similarly sidelined, our tribe. And because we relate to the tribe more than the whole employee group, when we're asked at a barbeque what we do, instead of saying we work for XYZ firm, we say we "work in IT." This misconception about how experts relate to the organization has serious implications for both experts and their managers. We discuss this in much more depth throughout this book.

Finally, another common criticism of experts is that we operate in our own little technical bubble, and we don't understand "the organization." Here's the thing: a high proportion of the experts who attend our programs are "guilty as charged." They demonstrate a significant lack of critical knowledge

about their organization and its strategic challenges and competitors (or, in the case of the public sector, substitutes).

This criticism is often valid because most experts focus on the acquisition and application of *technical* knowledge. They operate and interact with the organization almost entirely from a *technical* perspective. If they attend courses to expand their knowledge and skills, these will usually be on the technical side. This appears to make sense because of the role experts are typically asked to play: providing objective, emotionless analysis by leveraging facts and data and offering their technical expertise.

It's a classic Catch-22: the expectations of experts' contribution are restricted to technical inputs based on their area of specialty, and so that's where we focus our attention in terms of knowledge and skills acquisition, which guarantees we'll not be invited, expected or permitted to make broader contributions.

How Do Enterprise Skills Help Experts Break Through the Technical Ceiling?

WE HAVE NOW WORKED with more than a thousand technical experts from a wide range of professions, and we've got some wonderful news. Experts, in our experience, once convinced of the value of mastering enterprise skills, approach doing so with military precision. In the vast majority of cases, this results in extremely positive outcomes. This is because experts, by their very nature, are smart. We're also usually capable of great focus and are ambitious to make a greater difference. Many experts are surprised at the transformative nature of mastering a much broader skill set.

> *"This is a book you never knew you needed about things you never imagined were important."*

Richard Silberman, an insurance broker, told us: "Before I came across Expertship, I honestly thought there was something wrong with me. Expertship helped me realize that I am far from being alone. There was nothing wrong with me. I just hadn't learned the right skills."

Sweta Telkar, an SAP applications expert, told us: "Expertship has done a lot for my confidence. It helped me understand my positive and negative traits, and helped me be more in tune with myself. I had always felt that I was unable to articulate what I wanted to say. Exposure to Expertship has done a lot for my confidence. To be more effective, it was about me having enough business knowledge to be able to challenge the business. It helps us all realize our potential."

Aphra Hanlon, a program integration manager, told us: "Expertship taught me that just because you're articulate, that doesn't necessarily make you a good communicator. Different people think differently and have different motivations. A study of Expertship taught me how to communicate with other people on their terms."

Kellie Wills, a senior messaging engineer, told us: "Understanding Expertship really turned on a light for me. It made me realize there was so much more to being a technology person than the technology. I really got a lot out of the stuff on Personal Impact, which is essentially how other people see you."

Dave Brown, a project director, told us: "So often in my career, I have felt that the other person didn't understand what I was saying, while at the same time, I had a feeling I didn't understand them. A study of Expertship really changed that. Expertship has given me tools I can really use."

Lidia Jukic, senior corporate counsel, told us: "I found studying Expertship enabled me to develop a way of thinking that made for a more collaborative environment. I didn't previously appreciate just how much I have the potential to influence change in the organization. It equipped me with the insights and the tools to become a much more effective member of both the legal team and the overall organization. It helped me refine my skills and become a trusted advisor."

Tony Horton, a senior Unix administrator, told us: "I absolutely believe a study of Expertship changes people's lives. I realized I need to stop being 'the guy who can't be wrong.' I feel now that my relationships with people at work are way better, and I am more accepting of other people."

Tony also did us the honor of reading a beta version of this book, and when we asked him to write a short description of it, he wrote this: "The book you never knew you needed, about things that you never imagined were important. Finally understand why things are so hard to get done, and what you need to do to make it easier."

> *"There are three levels of Expertship, and Master Expert is the highest level."*

All of these executives have applied themselves to make the transition from expert to Master Expert. And the progress they have made in their careers is a testament to the fact that what's holding experts back isn't nature but nurture.
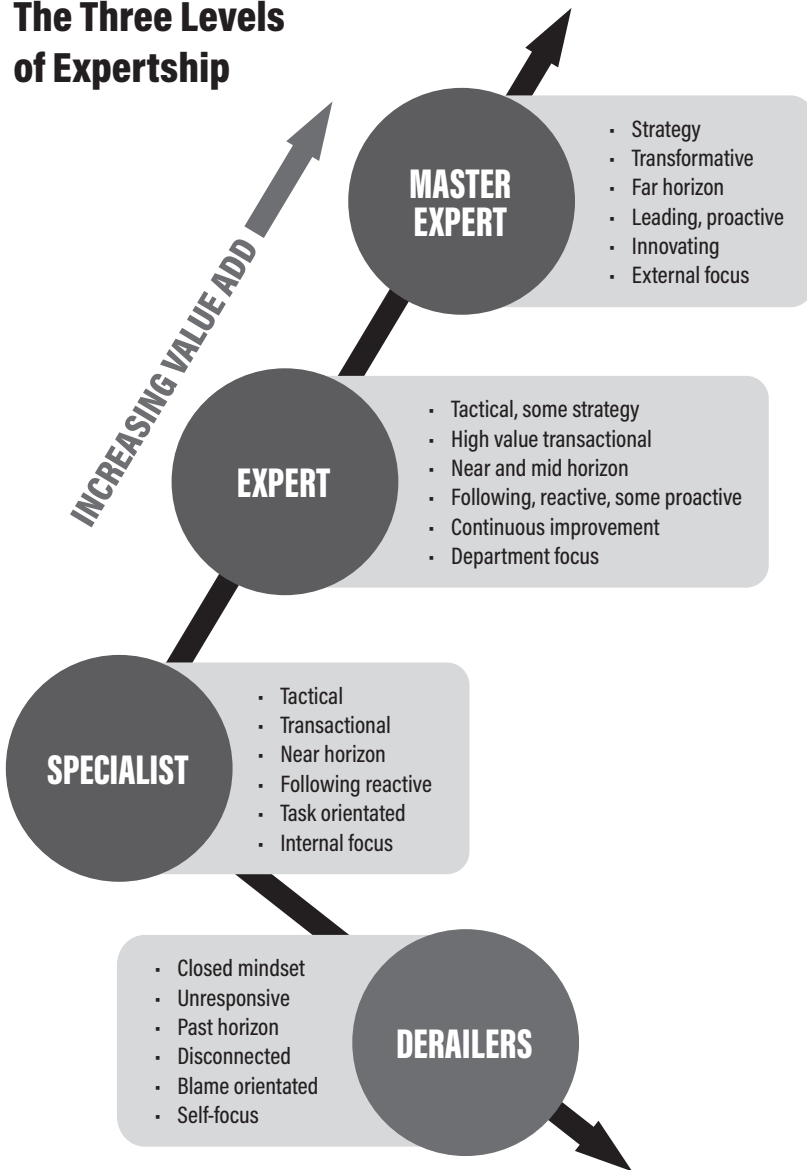
The Three Levels of Expertship

INCREASING VALUE ADD

MASTER EXPERT
- Strategy
- Transformative
- Far horizon
- Leading, proactive
- Innovating
- External focus

EXPERT
- Tactical, some strategy
- High value transactional
- Near and mid horizon
- Following, reactive, some proactive
- Continuous improvement
- Department focus

SPECIALIST
- Tactical
- Transactional
- Near horizon
- Following reactive
- Task orientated
- Internal focus

DERAILERS
- Closed mindset
- Unresponsive
- Past horizon
- Disconnected
- Blame orientated
- Self-focus

FIGURE 1.2: The Three Levels of Expertship

A Model for the Age of Experts

THIS BOOK EXPLORES THE three levels of Expertship, defined in our Expertship model (see Figure 1.2). This model describes what high-value contributions are possible when a combination of technical and enterprise skills is deployed. During Edward's review process, his manager, Alex, does have a capability framework, which is a description of behaviors that make experts successful, to refer to. Most organizations have such a framework for people leaders, but not for their experts. With the publication of this book, we remedy this problem.

Many experts arrive at our programs, and indeed at these very pages, believing they're as expert as they can be. They have arrived at this conclusion by measuring their technical prowess against all others. Their assessment of their status doesn't include measuring their mastery of enterprise skills.

The concept of being a Master Expert is new to many but quickly makes sense. Most experts we work with have very clear goals.
- They want to reduce or eliminate their low-level work and operate at a more strategic, value-adding level.
- They want to be more influential in their organization and beyond.
- They want to be involved, front and center, in transforming their organization through innovation.
- They want to be involved in initiatives that can make a difference.
- They'd like a career path that reflects this greater ability to make a contribution beyond purely technical advice.
- They'd like to be seen as a Master Expert in the organization and more broadly in their field.

If these aspirations resonate with you, then this book was written for you.

We often start our programs by asking experts to undertake a self-assessment, and we suggest you also do so when starting to read this book.

You'll see the assessment in Figure 1.3. We invite all of our participants to read the descriptions in the boxes carefully and then circle the box that's most appropriate to the level at which they're currently operating.

The assessment is a simple one based on the Expertship model, which is the underpinning model in this book. The Expertship model has three domains: Technical, Value, and Relationship. Each of these domains has three capabilities.
- **Technical Domain**: Expert Knowledge, Solutioning, and Knowledge Transfer.
- **Value Domain**: Market Context, Value Impact, and Change Agility.
- **Relationship Domain**: Personal Impact, Stakeholder Engagement, and Collaboration.

	RELATIONSHIP DOMAIN		
	Personal Impact	**Stakeholder Engagement**	**Collaboration**
MASTER EXPERT	Highly empathetic and inspirational. Takes ownership for business outcomes. Manages own and others' emotions effectively. Drives for results.	Proactively builds networks across and beyond the organisation. Strategic partner status. Manages conflicting priorities.	Models teamwork, collaboration and focuses on outcomes. Communicates excellently across stakeholders. Presents brilliantly. Diplomat - negotiates win-win outcomes.
EXPERT	Empathetic. Takes ownership for technical outcomes. Manages own emotions effectively. Engages beyond minimum results.	Builds effective relationships within immediate domain. Trusted technical partner status. Manages conflicting departmental stakeholder priorities.	Active team member. Expert advisor. Communicates well as functional representative. Presents efficiently. Negotiates from technical position.
SPECIALIST	Aims to establish personal credibility. Takes ownership of allotted tasks. Developing ability to manage own emotions. Delivers acceptable results.	Manages a small, effective network related to current mandate. On-demand technical supplier status. Struggles with conflicting priorities.	Active individual contributor. Technical advisor. Communicates as a technical staffer. Rarely presents. Responds to results of negotiations.
DERAILING	Disengaged and cynical. Blames others for unachieved outcomes. Poor at managing own emotions.	Operates within a limited network. External networks focused on profession. Talented but difficult to deal with.	Disconnected and distant from team. Communicates using impenetrable jargon. Seeks outcomes that are personally favourable.

VALUE DOMAIN			TECHNICAL DOMAIN		
Market Context	Value Impact	Change Agility	Expert Knowledge	Solutioning	Knowledge Transfer
Advanced knowledge of global organisation. Strategically and politically savvy. Understands competitors. Deep customer focus. Across global trends.	Generates long-term, strategic, business-orien-tated recommen-dations. Focuses on creating long-term customer value. Shapes solutions that deliver competitive advantage	Promotes positive change culture. Change catalyst. Articulates compelling case for change. Leads change. Confidently addresses concerns.	Advanced, comprehensive knowledge. Thought leader. Next practice.	Complex problem identification. Anticipates problems. Leads the shaping of technical and business solutions to future proof the organisation. Innovative.	Champions culture of knowledge sharing; sharing freely. Coaches technical cohort and wider organisation. Prioritises own and others' personal growth.
Advanced knowl-edge of local organisation. Customer focus. Strategically limited. Limited and local competitive focus. Across local trends.	Generates short-term, strategic, business-orien-tated recommen-dations. Focuses on cre-ating immediate customer value. Shapes solutions that deliver tech-nical advantage.	Models supportive change mindset. Identifies and promotes change initiatives. Executes change with professionalism and commitment.	Comprehensive knowledge. Current. Best practice.	Accurately identifies most problems. Swift response. Shapes timely and accurate technical and business solutions. Adaptive.	Promotes value of knowledge sharing; sharing when asked. Coaches technical cohort. Owns personal growth and encourages others.
Departmental knowledge. Tactical focus. Professional not market insights.	Delivers short-term, tactical, technical- orien-tated recommen-dations. Focuses on creating internal customer value. Shapes solutions that deliver internal technical benefits.	Models an ability to embrace change. Identifies and promotes individual change initiatives. Contributes dutifully.	Developing knowledge. Current. Early practice.	Accurately identifies common problems. Reactive response. Shapes technical solutions. Systematic.	Recipient of knowledge sharing. Deploys a directive training style. Owns own personal growth.
Siloed view of role and department. Internal focus. Operates in technical bubble. Trend blind.	Delivers techni-cal solutions with little long-term value. Inability to create customer value. Delivers short-term technical fixes.	Demonstrates a closed mindset towards change. Actively resists change initiatives. Reacts subjectively and emotionally.	Incomplete knowledge. Out-of-date. Past practice.	Identifies problems from past experience. Slow response. Jumps to known solutions. Inconsistent.	Resists knowledge shar-ing activities. Fails to contrib-ute to coaching/ sharing. Considers emerg-ing experts a threat.

FIGURE 1.3: The Expertship Self-Assessment

We encourage you to score yourself against each of these nine capabilities. You have four levels to choose from: Derailing Expert, Specialist, Expert, and Master Expert.

In order to complete the assessment, you will read the various behaviors that need to be commonly demonstrated at each level and then determine the level at which you're currently operating. Since this is a self-assessment and no one else will see it, be tough on yourself.

Of course, each expert will have their own strengths and growth opportunities, but we often see experts hover their pens over the *Master Expert* level, before choosing to circle the box below it, *Expert*, instead. In each instance, the Master Expert level requires us to commonly demonstrate elevated contributions to our team and organizations.

It's very rare that an expert would consider themselves at the *Derailing Expert* level, but in many instances, the experts we work with hold their hands up to one or more derailing behaviors. It's quite possible to rate ourselves at *Expert* level and yet still have a derailing behavior that we need to expunge.

Having had these stretch performance standards set by the Expertship model, most of the experts we work with almost immediately aspire to get to *Master Expert* level.

Indeed, the most common reaction to being shown the Expertship model is for experts to ask us why no one had shown them this performance model for experts previously. A few years ago, the authors could find few organizations that had adopted this type of performance chart for their high-value individual contributors, but more and more organizations in this age of Experts are recognizing the need to introduce such a capability framework to allow for career pathing for experts. Some have simply adopted this model.

The Edward Evolution

DURING OUR WORK WITH Edward's organization, and with Edward himself, we introduced the Expertship model to both Edward and his manager, Alex. It now continues to form the basis of all career and personal growth conversations that Edward is involved with. Alex has used the model as a basis for conversations with a broad range of experts in his finance department.

In the early conversations that Alex had with Edward, Edward concluded he didn't have a particular desire to be promoted into a people leadership role, but he did want to be promoted—rewarded and recognized—for his greater technical contribution. He also wanted to rise above being someone who provided analysis and be more involved in decision-making in the organization. Edward wanted to transform his relationships with divisional heads from being a supplier to a partner.

In order for Edward to achieve these goals, there needed to be a clearer understanding of how his work should be both assessed and rewarded, with both his manager and the wider human resources team.

With Edward's permission, we spoke at length to his manager, Alex, who told us that providing feedback for the very technical individual contributors in his department was the most difficult part of his entire job. Alex cited a range of reasons for this being the case. He admitted that when it came to the very technical aspects of Edward's role, for example, he didn't have either visibility or technical know-how to be able to adequately assess Edward's work, just as Edward suspected. With all of his individual contributors, Alex worked on the basis that if there were no complaints from his individual contributors' stakeholders, things were fine. This is where the "meets expectations" rating emanated, the score that had riled Edward to such a great degree.

> *"By explaining how we worked with Edward and Alex, readers will get a sense of how to use this book."*

When it came to how Edward operated as a colleague, we heard Alex state several concerns. Alex explained that, from his perspective, Edward operated very autonomously and rarely interacted with other members of the department. Alex told us that Edward had a reputation among his finance colleagues as being aloof and too busy to be interested in what everyone else was doing, or indeed help in times of high demand. Alex also expressed concerns about Edward's attitude toward him as a manager. "He's very independent and quickly gets defensive when I ask him what he's working on," Alex told us.

We asked Alex how he had communicated this feedback to Edward. Well, he hadn't. Why not? Alex was concerned about how Edward would react. In fact, he was sure Edward would react negatively. Alex didn't want to rock the boat and wasn't really sure how to address the issues about teamwork, since nothing about this was part of Edward's key performance indicators.

This state of affairs is very typical. On the one hand, we have a high-performing, dedicated but autonomous technical expert, and on the other, an uninformed and nervous manager. This is how what we call "feedback-free zones" occur. Many experts experience them.

He could see that in the technical domain, he performed very well, operating at full Expert level and with some elements of operating at Master Expert level. But Edward could also see that he had performance gaps. He was low in Market Context and also in Collaboration.

	RELATIONSHIP DOMAIN		
	Personal Impact	Stakeholder Engagement	Collaboration
MASTER EXPERT	Highly empathetic and inspirational. Takes ownership for business outcomes. Manages own and others' emotions effectively. Drives for results.	Proactively builds networks across and beyond the organisation. Strategic partner status. Manages conflicting priorities.	Models teamwork, collaboration and focuses on outcomes. Communicates excellently across stakeholders. Presents brilliantly. Diplomat - negotiates win-win outcomes.
EXPERT	Empathetic. Takes ownership for technical outcomes. Manages own emotions effectively. Engages beyond minimum results.	Builds effective relationships within immediate domain. Trusted technical partner status. Manages conflicting departmental stakeholder priorities.	Active team member. Expert advisor. Communicates well as functional representative. Presents efficiently. Negotiates from technical position.
SPECIALIST	Aims to establish personal credibility. Takes ownership of allotted tasks. Developing ability to manage own emotions. Delivers acceptable results.	Manages a small, effective network related to current mandate. On-demand technical supplier status. Struggles with conflicting priorities.	Active individual contributor. Technical advisor. Communicates as a technical staffer. Rarely presents. Responds to results of negotiations.
DERAILING	Disengaged and cynical. Blames others for unachieved outcomes. Poor at managing own emotions.	Operates within a limited network. External networks focused on profession. Talented but difficult to deal with.	Disconnected and distant from team. Communicates using impenetrable jargon. Seeks outcomes that are personally favourable.

VALUE DOMAIN			TECHNICAL DOMAIN		
Market Context	Value Impact	Change Agility	Expert Knowledge	Solutioning	Knowledge Transfer
Advanced knowledge of global organisation. Strategically and politically savvy. Understands competitors. Deep customer focus. Across global trends.	Generates long-term, strategic, business-orientated recommendations. Focuses on creating long-term customer value. Shapes solutions that deliver competitive advantage	Promotes positive change culture. Change catalyst. Articulates compelling case for change. Leads change. Confidently addresses concerns.	Advanced, comprehensive knowledge. Thought leader. Next practice.	Complex problem identification. Anticipates problems. Leads the shaping of technical and business solutions to future proof the organisation. Innovative.	Champions culture of knowledge sharing; sharing freely. Coaches technical cohort and wider organisation. Prioritises own and others' personal growth.
Advanced knowledge of local organisation. Customer focus. Strategically limited. Limited and local competitive focus. Across local trends.	Generates short-term, strategic, business-orientated recommendations. Focuses on creating immediate customer value. Shapes solutions that deliver technical advantage.	Models supportive change mindset. Identifies and promotes change initiatives. Executes change with professionalism and commitment.	Comprehensive knowledge. Current. Best practice.	Accurately identifies most problems. Swift response. Shapes timely and accurate technical and business solutions. Adaptive.	Promotes value of knowledge sharing; sharing when asked. Coaches technical cohort. Owns personal growth and encourages others.
Departmental knowledge. Tactical focus. Professional not market insights.	Delivers short-term, tactical, technical-orientated recommendations. Focuses on creating internal customer value. Shapes solutions that deliver internal technical benefits.	Models an ability to embrace change. Identifies and promotes individual change initiatives. Contributes dutifully.	Developing knowledge. Current. Early practice.	Accurately identifies common problems. Reactive response. Shapes technical solutions. Systematic.	Recipient of knowledge sharing. Deploys a directive training style. Owns own personal growth.
Siloed view of role and department. Internal focus. Operates in technical bubble. Trend blind.	Delivers technical solutions with little long-term value. Inability to create customer value. Delivers short-term technical fixes.	Demonstrates a closed mindset towards change. Actively resists change initiatives. Reacts subjectively and emotionally.	Incomplete knowledge. Out-of-date. Past practice.	Identifies problems from past experience. Slow response. Jumps to known solutions. Inconsistent.	Resists knowledge sharing activities. Fails to contribute to coaching/sharing. Considers emerging experts a threat.

FIGURE 1.4: Edward's Self-Assessment

We have provided Edward's self-assessment against the Expertship model in Figure 1.4.

Over the course of six months, Edward and Alex transformed their relationship and their effectiveness as a finance team.

They built a Personal Growth Plan (see Chapter 50, *Building a Personal Growth Plan*) for Edward, and Alex was able to provide Edward with many opportunities to build up his broader knowledge of the market context of the business and its strategy (see Chapter 26, *Why Market Context Matters So Much*). Edward himself was determined to study both his own organization (see Chapter 27, *Becoming a Student of Your Organization*) and its competitors (see Chapter 28, *Becoming a Student of the Competition*). Alex and Edward agreed that Edward should play a more active role in collaborating with other colleagues in finance, and that in doing so, he would improve the outputs he provided for his stakeholders (see Chapter 22, *The Many Team Roles of Experts*). They also discussed building proactive stakeholder engagement plans for key divisional heads and agreed to undertake a Stakeholder Health Check (see Chapter 12, *Expert Stakeholder Strategy*) on a few stakeholders where the relationship was potentially broken or sub-optimal. Finally, for this first Personal Growth Plan, they agreed Edward should review how he currently spent his time and where he believed he ought to (see Chapter 9, *The Expert Energy Engine*), and also deploy some tactics to make this happen (see Chapter 10, *The Art of Saying No*). We might note that every growth objective Edward chose was building his *enterprise skills* rather than his *technical skills*. This is very typical of the Personal Growth Plans we see from experts.

Alex himself agreed that he had some growth to work on. He agreed that he needed to listen more carefully to his team and stakeholders (see Chapter 20, *The Power of Listening*), and that he needed to become much more active in helping his team plan and develop their careers (see Chapter 49, *Building a Talent Factory*).

In explaining how we worked with Edward and Alex, readers will get a sense of how to use this book. You can read it from start to finish, or, and most experts deploy this approach, you can self-assess and then turn directly to the chapters on the relevant topics. The book is designed to be a flexible reading experience.

Our Mission: Change the Expert World

CHANGING THE EXPERT WORLD by helping every expert evolve into a Master Expert is a big objective. We estimate that there are 40 million technical experts in the world, so this is quite a lofty goal. Our approach to this mission is attempting to help one expert at a time.

The challenge for many experts is that the burning platform, the immediate need to learn and deploy advanced enterprise skills, isn't readily apparent. As we discussed earlier, there is a danger that experts will play the victim, expecting others to change before they do.

In Samuel Beckett's famous play, *Waiting for Godot*, two characters (Didi and Gogo) wait for the arrival of someone named Godot, who never arrives. We sometimes see this scenario play out for experts. Many of us are waiting for the wonderful day, at some unknown time in the future, when everyone else in the organization will suddenly have an epiphany and realize that we're outstanding contributors, worthy of adoration and investment, who should be elevated to rock star status.

In our programs, we meet many experts who hold this view. We typically start this conversation:

Facilitator: *So, you've chosen to wait for the rest of the organization to see the error of their ways and change their thinking about experts?*
Expert: *Yes.*
Facilitator: *How long have you had this as your strategy?*
Expert: (Pause) *Er, ten years or so.*
Facilitator: *How successful has this strategy been? Seen any changes?*
Expert: (Further pause) *Er, no. No change. It's going badly.*
Facilitator: (Deliberately long pause, allowing the expert to contemplate the significance of their answer) *Given the current lack of progress, would you be open to considering an alternative strategy?*
Expert: (Grudgingly) *I suppose so.*
Facilitator: *Are you sure? You don't sound sure. Perhaps you could continue with your current strategy and something will change soon?*
Expert: (Having processed the conversation because they're smart) *I wasn't sure, but now you've put it like that, continuing with the same strategy would be madness, right? So, what's the alternative?*

Einstein once said that insanity is doing the same thing over and over and expecting a different result. This is, in effect, what many experts are doing. And Einstein was right—it's insane!

The first mindset experts have to change is *our own*. Then, and only then, will we be in a position to influence a change in mindset in others about the way in which experts are experienced and valued across every organization. That's our modest mission with this book: a global change that helps every expert be the best expert they can be and helps organizations everywhere acknowledge their value accordingly.

Let's begin.

TAKING ACTION

Growing Our Expertship

THROUGHOUT THIS BOOK, AT the end of each chapter, we will make some suggestions for actions you might wish to take to build your Expertship skills. Here is the first:

▶ START WITH A ROBUST SELF-ASSESSMENT

Later in this book, we describe a variety of assessments you can undertake to establish the current level of your expertship. But we recommend starting with some personal reflection. Undertake the same exercise that Edward did. Assess where your current behavior sits on each of the nine capabilities of Expertship by using the grid in this chapter. Ask yourself:

- After examining the behaviors at each level of each capability, where do my *typical* behaviors rank? Specialist, Expert, or Master Expert?
- As much as I would like to be generous to myself, am I being robust in my assessment? Do I really exhibit those Master Expert behaviors every working day?
- Looking at the lowest ratings, what skills and behaviors do I need to master in order to be able to rate myself, in the future, at a higher level? (If you aren't sure, read the relevant chapters of this book (see Chapter 3 for a guide).