

# “Making the Shift” - From Technical Expert to Organizational Leader

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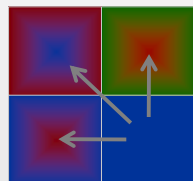
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**Making The Shift**

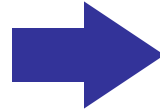
## Making the Shift: Moving from “technical” expert to business leader

- Setting the stage for ‘Making the Shift’
- It must be a choice
- Three shifts
  - » Expertise to credibility
  - » Doing it all to working through others
  - » From tactics to being strategic
- Summary

- Scientists, Engineers, IT professionals, functional experts and others working in a technical or expert capacity within their organization
- Mid-level to Sr. level managers and leaders with strong expert skills
- Technical leaders with little to no peer group within their own organization

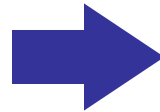
# What does it take?

- **Doing it all alone**



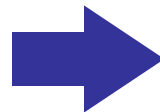
- **Managing and enabling the work to be done by others**

- **Being the smartest person in the room**



- **Developing smart thinkers who get results**

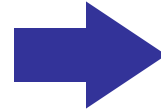
- **Avoiding conflict**



- **Developing effective people skills**

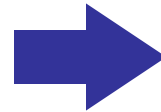
# What does it take?

- **Being tactical**



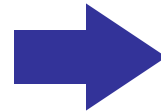
- **Developing broader business perspective**

- **Focused on the “what” of the work not the “who”; Thinking people skills are for others to worry about**



- **Developing critical relationships to increase one’s visibility and impact on the organization**

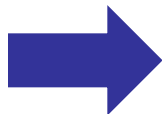
- **Ignoring politics**



- **Recognizing how decisions are made and being able to navigate the organization**

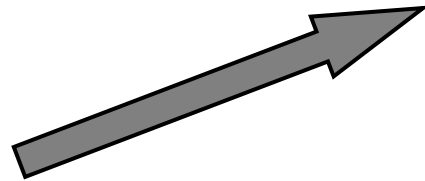
# Why is this important?

- Business is complex and requires having different experts contribute and work together effectively
- The pace of change is increasing and requires more alignment
- Competition is higher needing faster execution on the “right stuff”

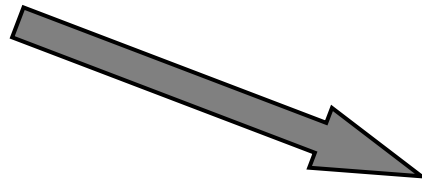


**Companies and organizations need people to develop into broader roles**

# Making the Shift needs to be a Choice



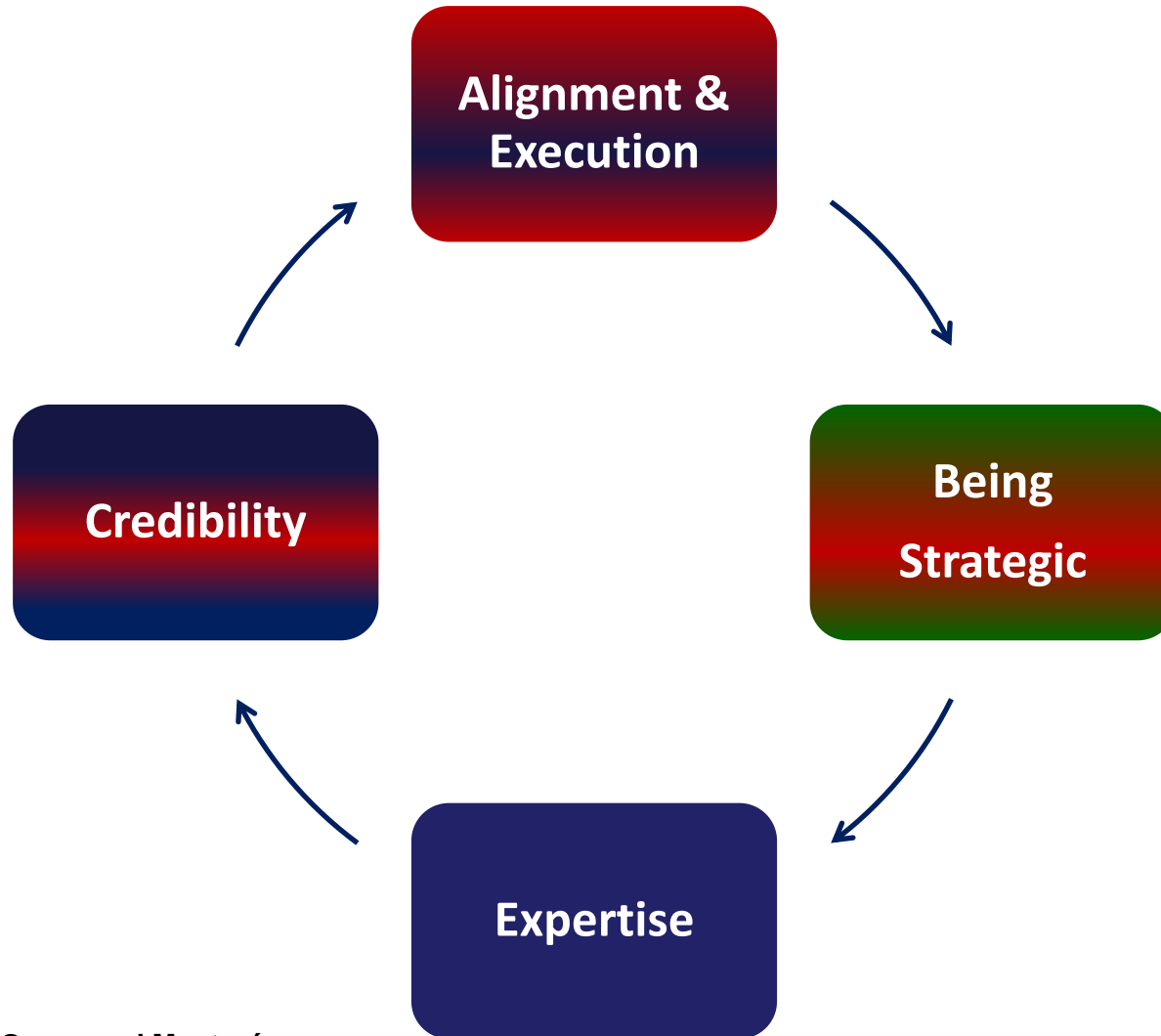
The Leadership and  
Management Track



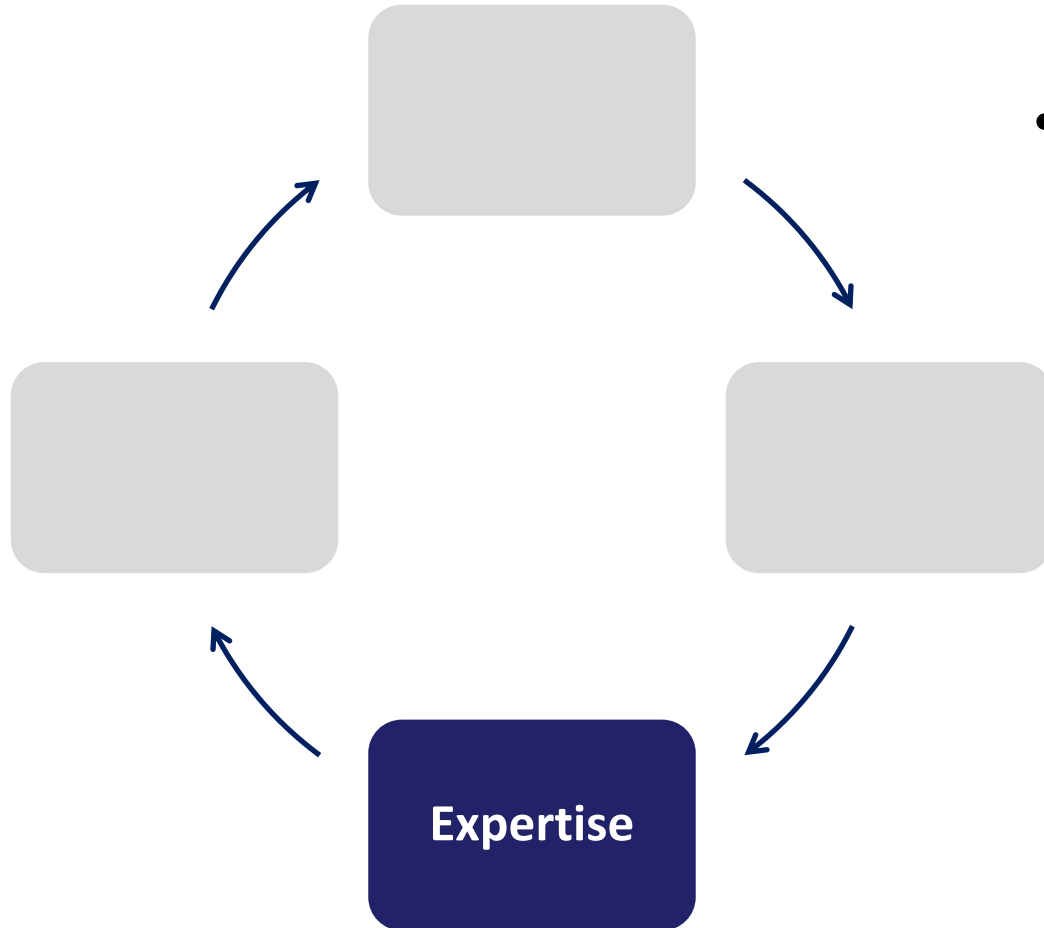
The Technical Track  
- Still need Credibility



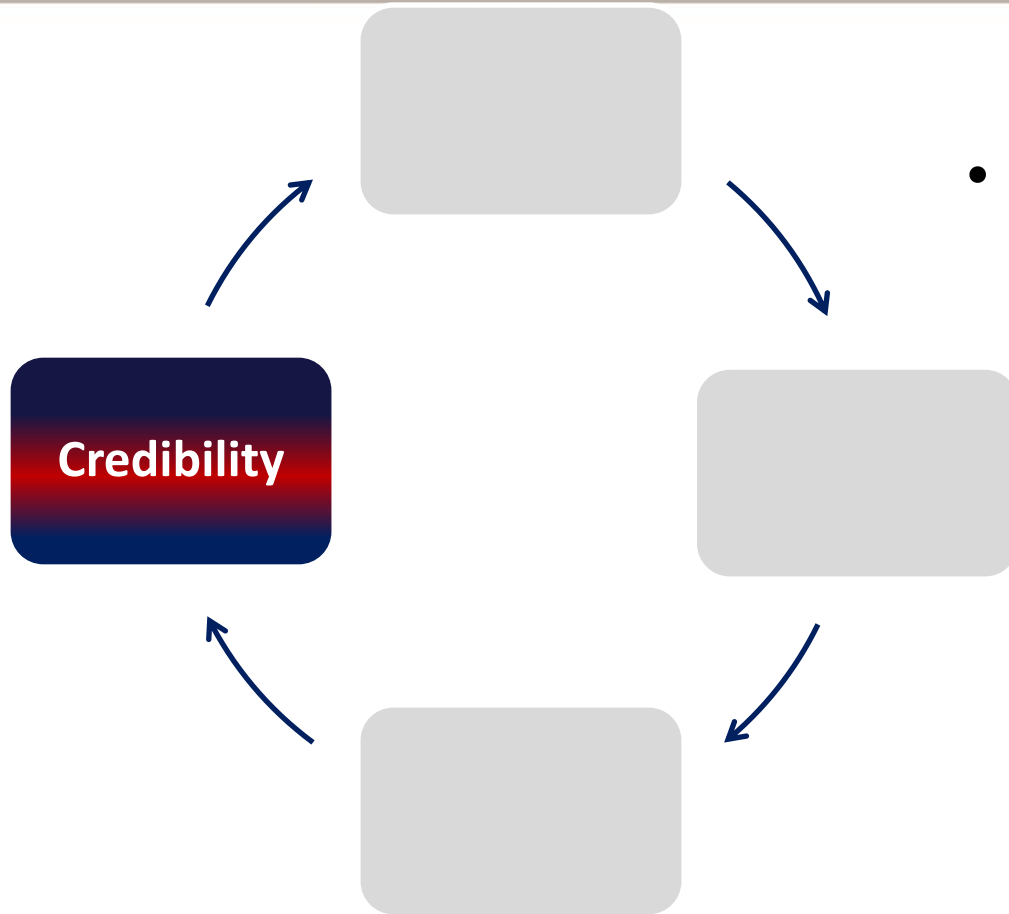
# The Mentoré Model\* - The Shifts



# It all starts with expertise.



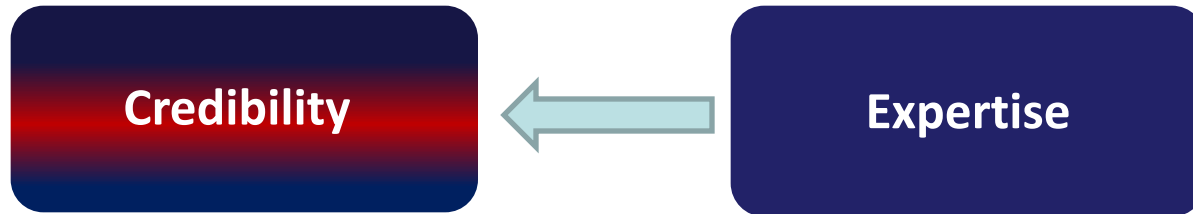
- An individual needs to build technical competence and develop a track record of successful performance



- A leader needs to build credibility and trust in order to develop a base of power and influence and increased visibility in the organization

Credibility – Relationships, “The Who”

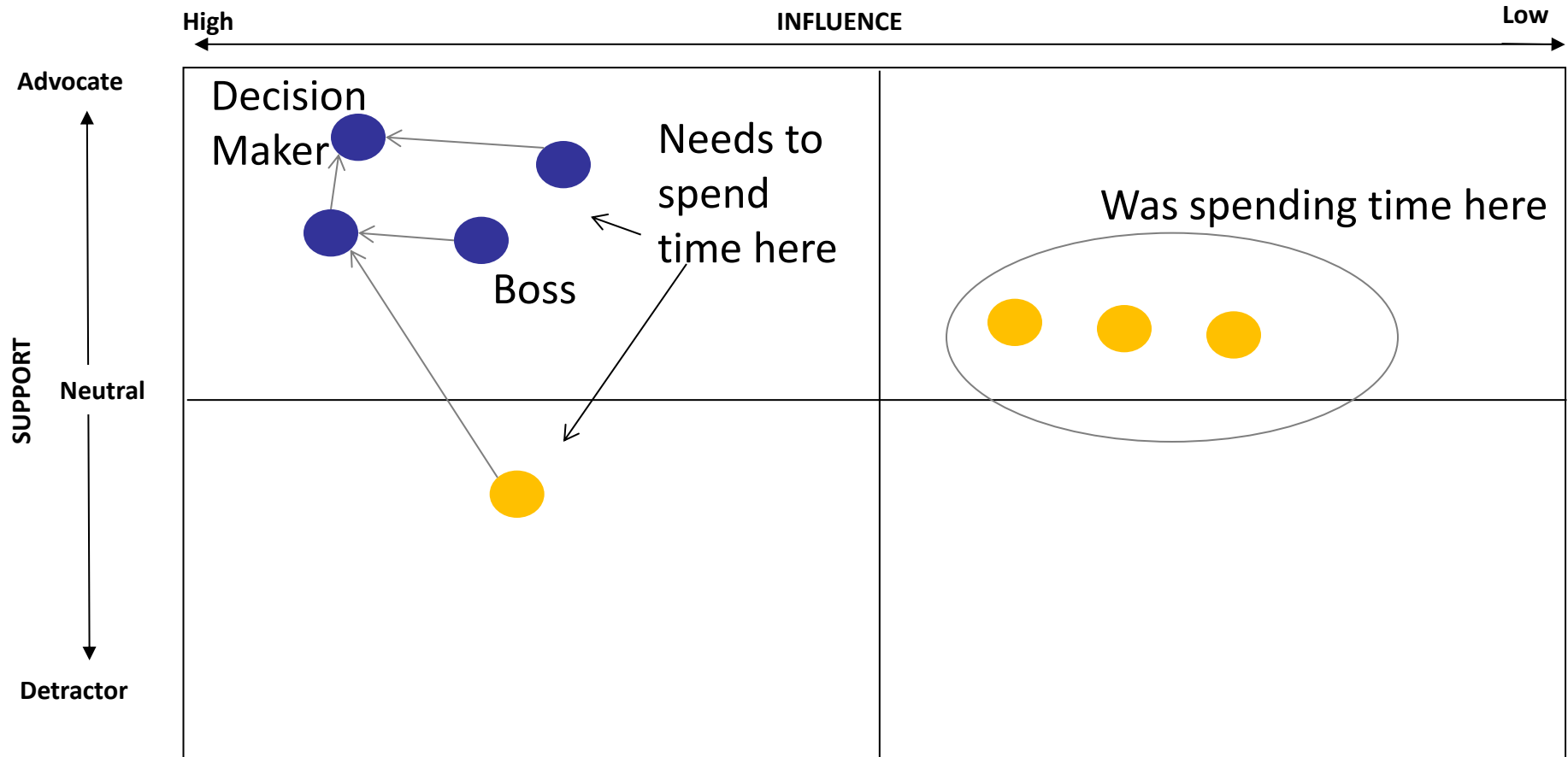
# How To Develop Credibility: Build A Base



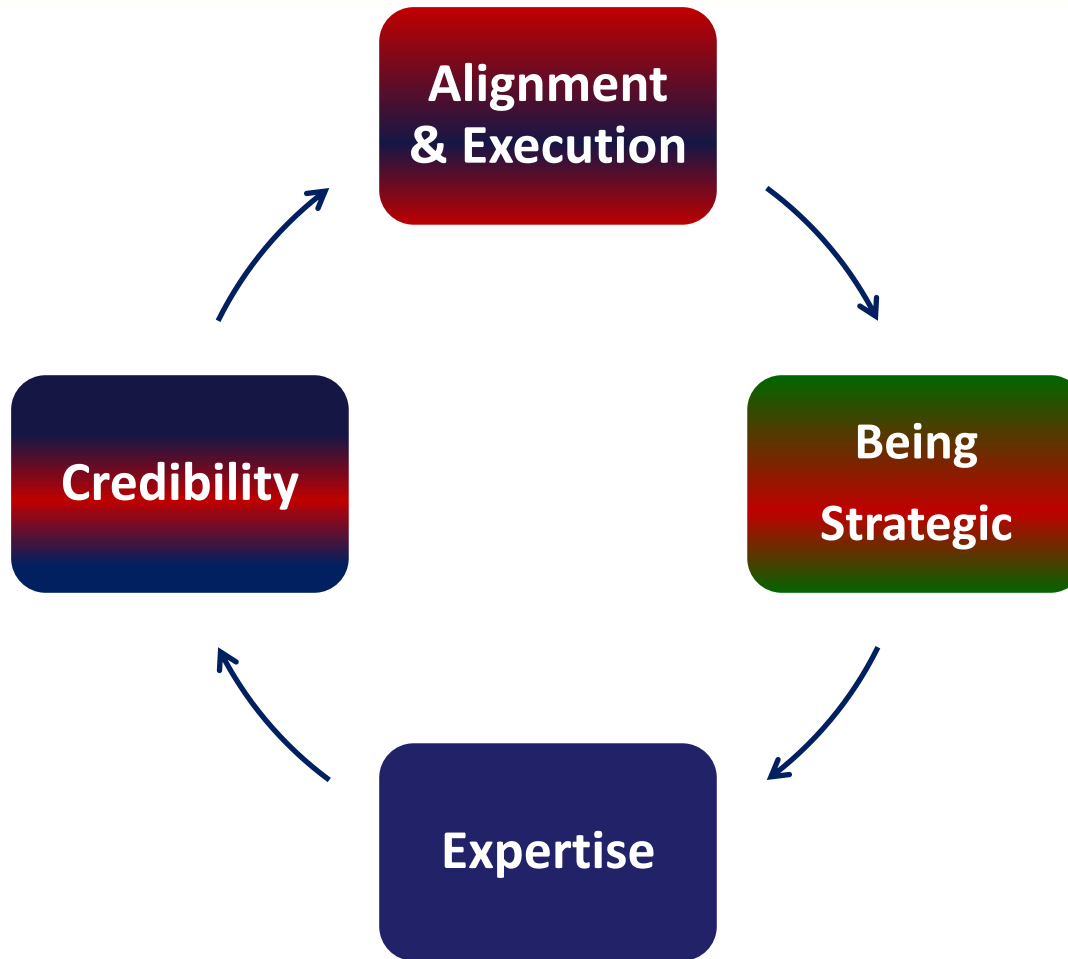
- Build off a base of Technical Expertise
- Demonstrate a history of sound judgment
- Commit and deliver - Over and over again
- Image
- Presence
- Connections

- Expertise
- Credentials
- Reputation
- Track record of success

# Example: The Influence Plan – Map it out!



# The Shifts



**With Credibility in hand we move to Alignment and Execution**

# Alignment & Execution

**Alignment &  
Execution**

**Being  
Strategic**

- A leader's impact on the organization is measured by his or her ability to maximize individual and team performance and deliver results

**Credibility**

**Expertise**

“Working through others”

What does it take: A leader's ability to execute is based on his/her ability to work through others successfully.

## Alignment & Execution

- At Your level – Lead by Example
- At a team level - **Team Perspective**
  - “On-the-field” view
  - Need to understand and utilize a set of team fundamentals whether as a leader or team member
- At an organizational level - **Strategic Perspective**
  - A “press box” view
  - Culture
  - Systems, Processes and Organization
  - Change Management



# Example: Standards for Team Performance

- **Clear Goals and Objectives** – *the mission is clear*
- **Timelines** – *established clear, doable timeframes and milestones*
- **Open communication** – *free flow of information*
- **Decision making** – *informed decision making at lowest level possible*
- **Trust** – *openly shared information with no agendas*
- **Dealing with conflicting views** – *the road to creative problem solving*
- **Mutual accountability** - *people deliver on their commitments*
- **Setting expectations** - *openly addressed and reset as needed*



# Example: Assess the team – think at the team level

Illustration – Just one Dimension of a team

	Open Communication	
We sometimes hold back saying what is the ugly truth in deference to a prettier half-truth	1 2 3 4 5 Rarely Often	Open honesty and dear intentions are generally the rule of thumb here

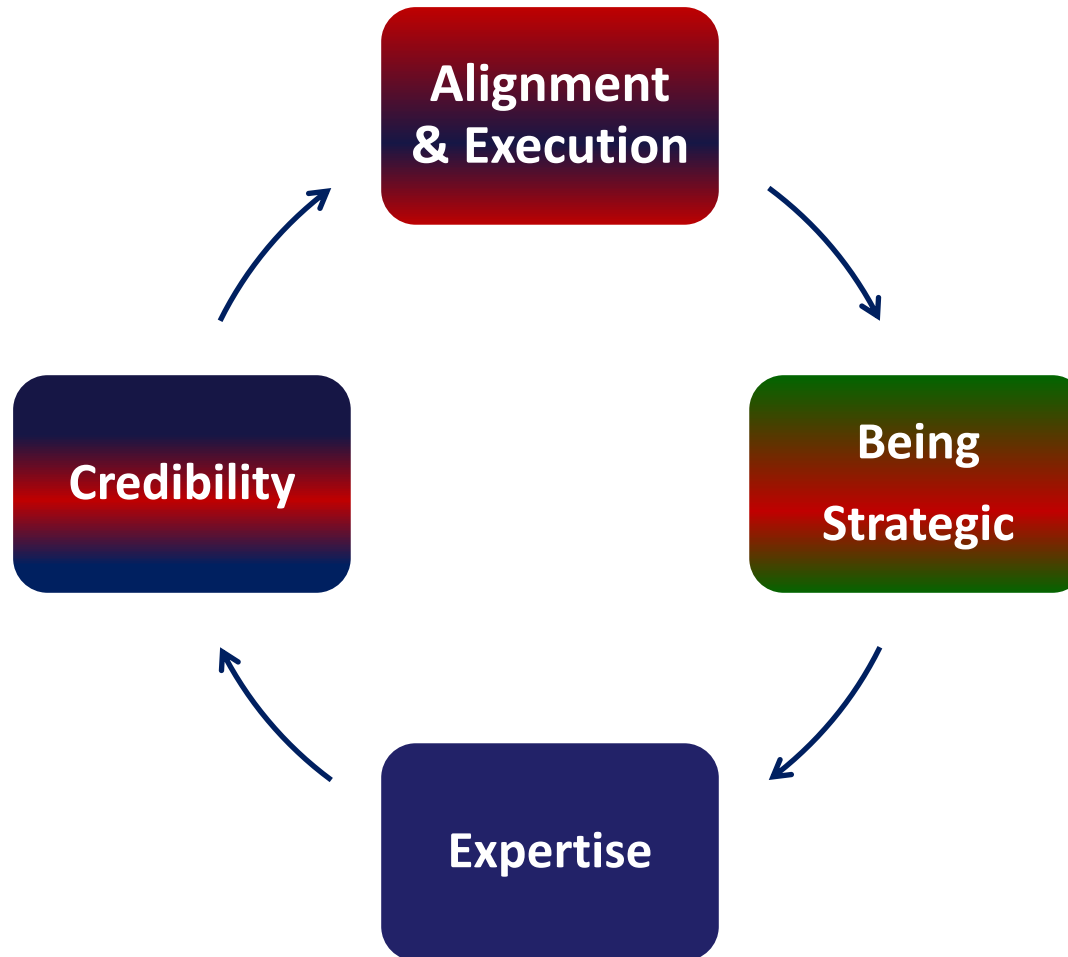
Tip: Use your organization's team definition

# Example: The Critical step for technical people

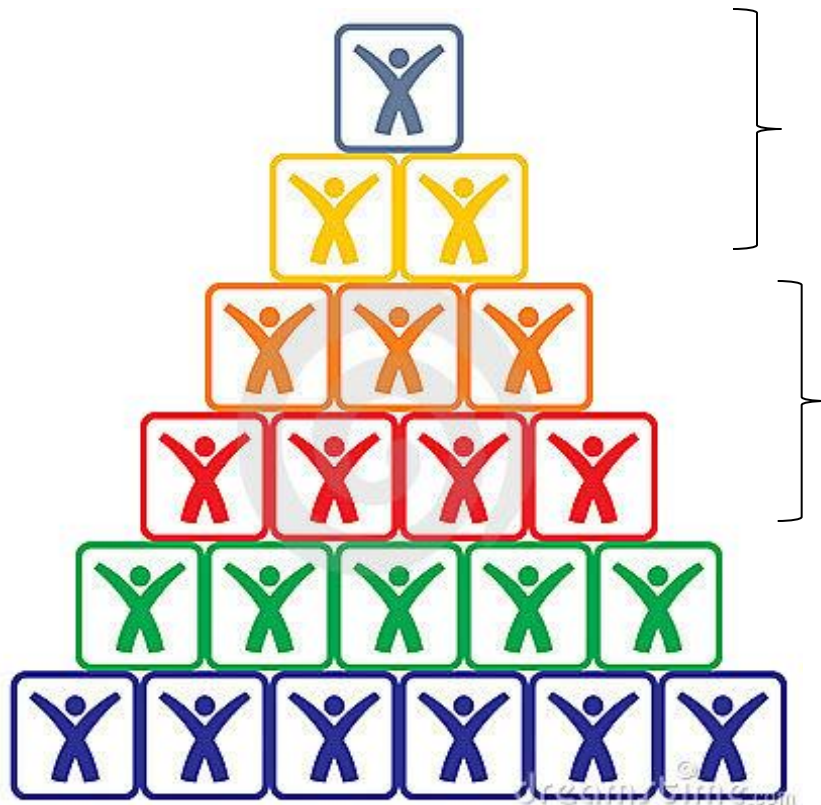
## Take Action

<b>What's Working?</b>	<b>What's Not Working or Missing?</b>	<b>Remedies and Actions Required?</b>

# The Shifts – The Third and Final Shift – Being Strategic



# Critical point: Strategy vs. Being Strategic



Organizational strategy sits here

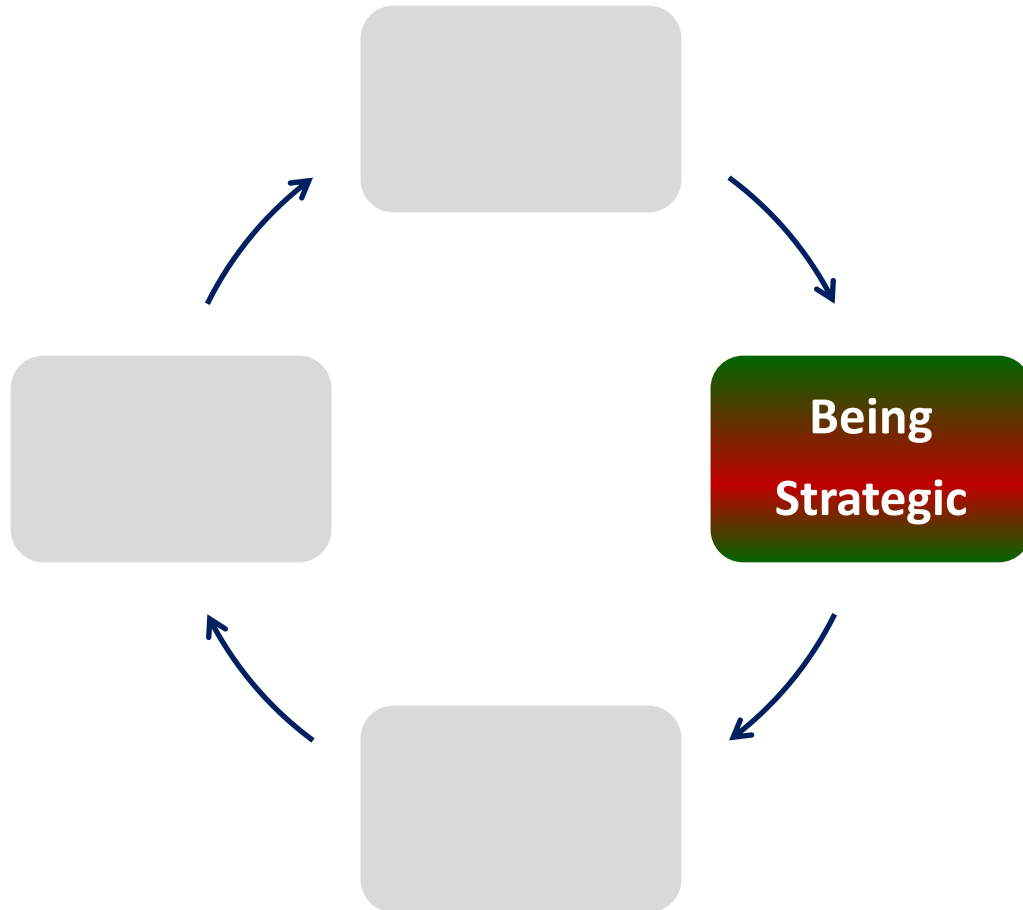
Our population in here needs to be as strategic as possible

# How “Big” is the Big Picture?

- How broad an understanding depends on where you/your organization sits in the business
- At the very least, it entails an understanding of your internal customers
  - » Those to whom you provide products and services
- The business itself
  - » What drives the business
  - » Value proposition, core competencies, competitive differentiators
- The marketplace
  - » The business environment
  - » Competitors



# Being Strategic



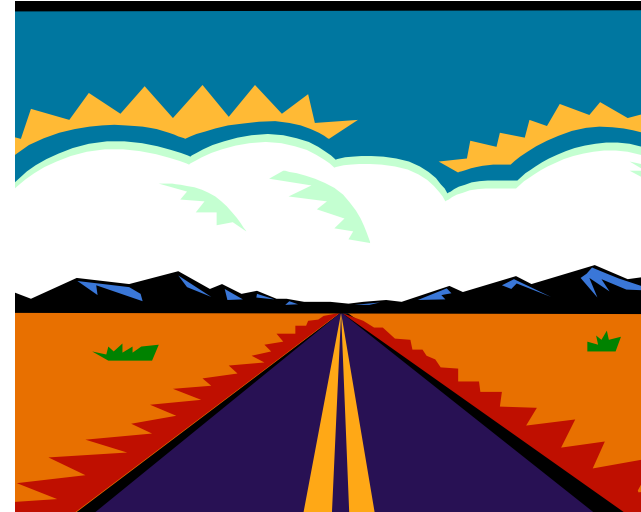
- An effective leader looks out beyond one's own organization to the business and the marketplace to understand what the business needs to do to compete effectively, now & in the future

# Example: Strategic Vision

Intended to look at what ***you and your organization*** are doing at a higher than operational level

Answers the questions ...

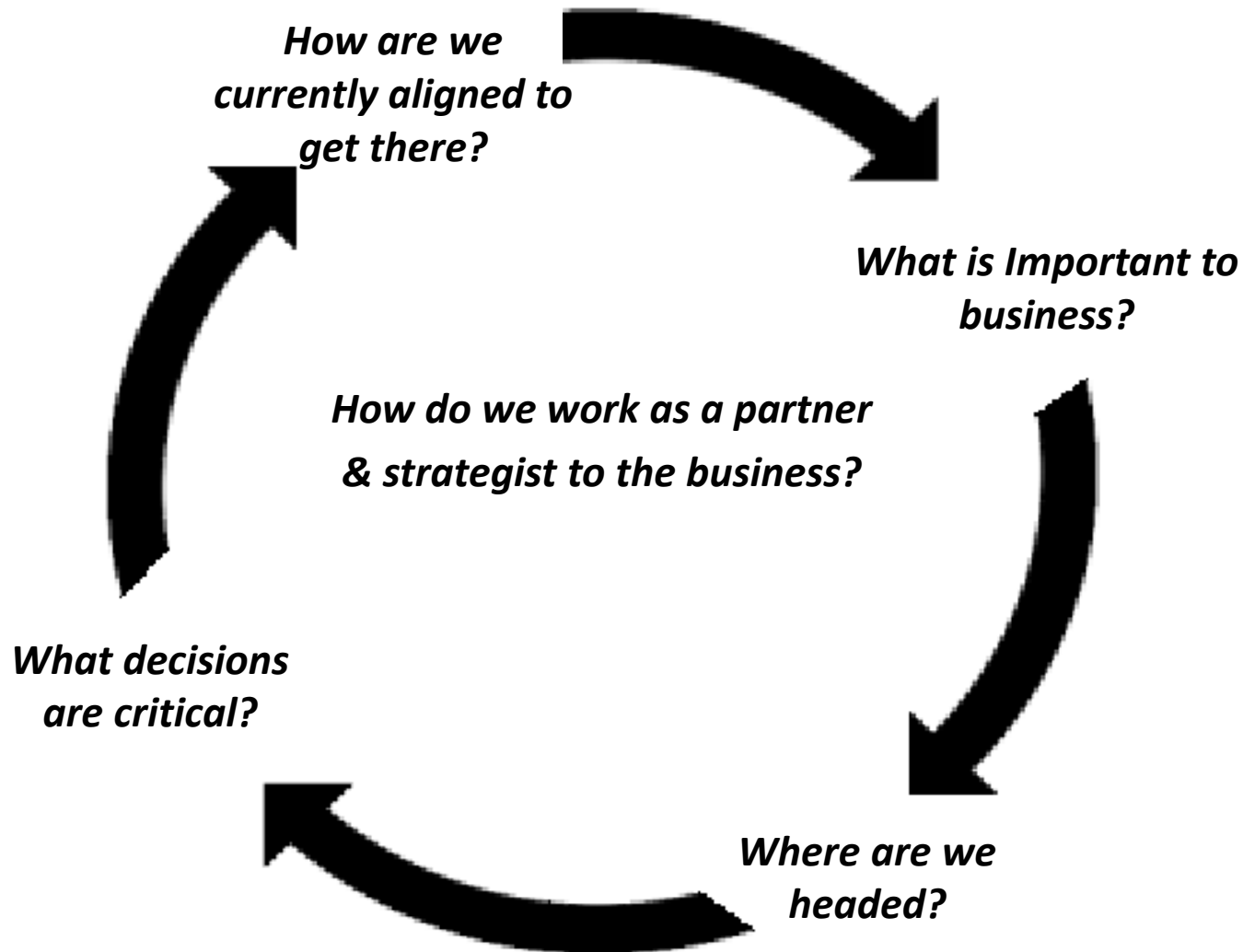
- » ***What are you trying to accomplish?***
- » ***Why are we doing it?***
- » ***How do you add value to your customers and the business?***

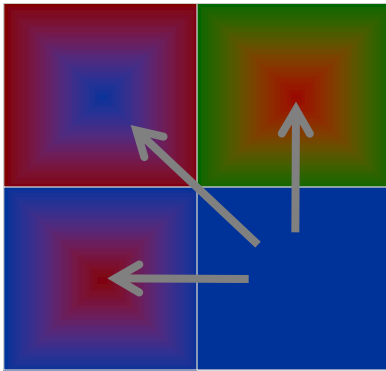


**Key Point: Paints a picture of what you are doing**



# The Strategic Questions





*Making The Shift*

- Common challenges
- Making the shift should be a choice
- The Three Critical Shifts
  - Expertise to Credibility
  - Doing it all to working through others
  - From Tactics to Being Strategic
- Put it into action - Examples

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