

The Specialist Career Track

How to unleash the power of specialist talent

Introduction

Many technical specialists aspire to managerial roles for all the wrong reasons: status and career progress, rather than capability and motivation to lead. The main reason is, because the specialist career path has not been developed with the same sophistication as the managerial career track in many companies. A lot of value gets lost by companies promoting their best specialists into managerial roles, without properly reviewing their managerial capability.

The leadership pipeline (Charan & Drotter, 2001) has resonated well with the business community for almost a decade for its description of the career track for leaders. It has informed many talent management practices and proven its value by informing the design of countless leadership development initiatives. In a large development program for over 900 specialists (legal, technical, marketing, risk, compliance, relationship managers and product specialists) over a five year time period we have found that there is a clear pattern of career transitions for specialists as well. The transitions can be described as three career stages, based on the specialists' contribution to clients and strategy: technical specialist (called the 'individual contributor' in the leadership pipeline), trusted advisor and strategic business partner.

In other contexts, the concepts of a 'trusted advisor' (Maister, 2000) and 'strategic business partner' (Ulrich, 1996) have received a lot of attention, but not in the specific context of specialist development. In this article we describe the three different career stages and the two fundamental transitions needed to move up the career ladder, without necessarily taking on managerial responsibility. These transitions are fundamental because the different career stages require different skills, values and time horizons, similar to the transitions in the leadership pipeline. The description of a coherent and generic career path for professionals enables us to focus development and address some critical organizational development issues.

Simultaneously, the development effort can offer an excellent opportunity to co-create a strategic understanding with specialists and Senior Management involved and help them all to focus their work and prioritize. All participants of this open strategy dialogue are often enthusiastic about the process and the outcomes. It merges the often positivistic, linear and deterministic strategic statements of the company with the emergent, messy, emotional and complex reality of business life. It makes everybody more visible as a human being. It builds relationships and trust and generates the energy to work on a shared ambition.

Section 1: Three career stages

Dimensions which create turning points: strategy & clients

Each career of a knowledge worker starts off by learning the technical dimension of the profession. Whether the specialist is a Java web developer, HR consultant, junior marketer, an advertiser, an accountant or a lawyer, there is a world of professional knowledge and skills to be mastered, in order to become a true technical expert. This body of professional knowledge is in many professions so vast that one could spend an entire career learning new knowledge and skills, without moving to the next career stage. The focus of a technical¹

¹ In this article the word 'technical' refers as a generic term to any kind of knowledge intensive profession such as: legal, sales, marketing, compliance, operations and IT, finance, risk, HR and engineering.

specialist is rooted in the positivistic domain. The focus is on 'getting it right', learning the tricks of the trade, often assuming that there is a right answer, a best technical solution, a superior outcome. The old guild learning model is still productive here: the specialist works on (small) technical challenges with a more senior specialist checking the end result, providing assistance and immediate feedback to the work at hand. In this context the advocacy of the senior specialist about the profession is appropriate. You could call 'profession' the first guiding principle of the specialist career track. Many large corporates and professional service firms have invested considerably in outlining these levels of expertise in order to distinguish different technical specialist levels: junior, middle, senior and align job profiles, remuneration and development accordingly. As there are an abundance of tools and concepts available to make this technical progress visible and tangible, we will put it aside in this article. We fully acknowledge its essential contribution to the discussion of the specialist career.

In this article we focus on two other guiding dimensions which have a fundamental impact on the work that professionals do, the development of their careers and their overall contribution to the organization: strategy and clients. It is often the lack of strategic understanding of the company or the limited perspective of client needs that halts a specialists' career. Or put in more positive words: if technical specialists understand how they can best contribute to strategic priorities and create more customer value, they can make a step change in their career towards becoming a 'trusted advisor' and later on to becoming a 'strategic business partner'.

Understanding customer requirements

It takes one look at your mobile phone to understand what is not meant by 'understanding customer requirements'. The mobile phone is full of applications and gadgets that 90% of the users will never use. Features which make great sense from a technical perspective, but much less so from a customer perspective. This technical perspective (in this example an engineering perspective) is a first starting point of a specialist career. The specialist explores the breadth and depth of his/her technical expertise. (S)he learns what is technically possible and what is the best technical solution. Designing new features for a mobile phone is a simple example. At some point however there is a limit to what the professional expertise can bring to the business challenge. In case of the mobile phone there is a realization that new features only, will not create a better phone in the eyes of the customer.

This is a turning point in a technical career because all technical knowledge now needs to be put in a much broader context of the customer requirement. The challenge for each technical specialist becomes to look at the whole of the company and the customer request rather than just their own part of the technical profession. Therefore they need to collaborate with other functions who do not share the same technical language, expertise and background. The interaction with clients and peers from other functions will need to shift dramatically from the technical expert focus to a customer/company focus.

Further up in the specialist career track lies yet another turning point with regard to customer requirements. At the top level of the specialist career, the specialist understands the broader context of customer requirements and company strategy. Simultaneously (s)he is able to view these requirements through the long term evolution of his/her strategic technical expertise and the trends across a group of clients. (S)he develops a strong view how their profession can help to accelerate the realization of company ambitions, even if this deviates from current customer requirements. The top level customer contribution is to envision what future client needs will be, especially the needs that clients cannot formulate themselves yet. It is also likely that the clients will become more senior: C level relationships. In this environment a broad business understanding and broad client interest become more important than the details of the technical profession. Simultaneously, these clients expect their counterparts to have a compelling point of view of the contribution of their profession to the business as a whole.

Here is an example: At the first stage (technical specialist) a young lawyer is contributing to the completion of all legal documents around the merger of two companies. At the second stage (trusted advisor) she develops the skill to time when and how the legal documents should be introduced between her two merging clients. At the third stage (strategic business partner) she translates the evolution of international M&A jurisdiction to new legal process steps for a successful merger for her firm and her clients.

Understanding company strategy

The other guiding dimension of a technical career is the contribution of the specialist to the strategy of the company. At the first stage a technical specialist is using and expanding their technical **know-how** and skills in the company setting with little impact on the strategy of the firm. At the second level specialists are contributing to the *realization* of the strategic direction. It becomes important for them to know what the direction is and how they can contribute through the focus and prioritization of their work.

At the top level the specialist is expected to contribute to strategy *formulation* through his knowledge of his functional domain and his creative ideas how the company can create value from the developments in his function.

Another example: a finance specialist may start to contribute to a new costing system in the company using his specialist costing know how. At the second stage he may work on a strategic assignment with the lean project team and HR to bring down the overall cost level and create a more cost conscious culture in the company. At the top level, he foresees new European financial regulation coming and he spots competitors who have organized their balance sheet and long term debt more efficiently. He presents his ideas convincingly in the board and formulates a project plan with action steps to reorganize the balance sheet and anticipate the new regulation at the same time.

Section 2: The specialist transitions

	Technical specialist ²	Trusted advisor	Strategic Business Partner
Skills	<ul style="list-style-type: none"> • Technical proficiency • Using company tools & processes • Self management • Relationship building • Delivering results 	<ul style="list-style-type: none"> • Dialogue • Deep influencing • Virtual teamwork • Building personal relationships 	<ul style="list-style-type: none"> • Stakeholder management • Cross border collaboration with external partners • Business knowledge & strategic thinking
Time Horizon	<ul style="list-style-type: none"> • 0 – 6 months 	<ul style="list-style-type: none"> • 6 months – 2 years 	<ul style="list-style-type: none"> • 1 – 2 years or more
Values	<ul style="list-style-type: none"> • Technical focus • Analytical, problem solving approach • Getting it right, technically best solutions 	<ul style="list-style-type: none"> • Client focus • Holistic systemic approach • Integrated solutions 	<ul style="list-style-type: none"> • Outside – in focus • Value creation, problem creation • Innovation, next practice • Applying cross border ideas

Becoming a trusted advisor

David Maister (2000) views trust as the key differentiator between a technical specialist and a trusted advisor. As a technical specialist you demonstrate your credibility and reliability through excellent technical results and demonstrated knowhow. At the trusted advisor level, the specialist will need to show his ability establish personal relationships ('intimacy') beyond their **know-how** and technical results. In our development programs this proved to be a paradigm shift. The technical specialist has deeply incorporated the positivistic paradigm in which there is a right and wrong answer, immediate problem focus, linear cause-and-effect relationships, single best technical solutions and a conversation style based on advocacy at best and arguing at worst. The transition to a trusted advisor requires **building** personal relationships based on skills such as dialogue, deep influencing and in global firms: virtual teamwork. Underlying is a greater sense of self awareness, which highlights strengths and weaknesses in applying these skills.

The more challenging part is probably to internalize the values around a holistic, systemic approach and the creation of integrated solutions based on a customer focus, rather than on ideas which may be technically

² Adapted based on: from Charan & Drotter: The leadership pipeline (2001)

superior. It is often a deep sense of identity that is touched when the profession is no longer the starting point for a solution. Imagine the case of engineers in Operations & IT, who have built software applications for years to support their company's products and services. They now learn that the number of applications has to be reduced dramatically in order to reduce cost, complexity and to enable the function to keep servicing the business at competitive standards. It means that the remaining applications will be more generic and have less (advanced) features than their previous applications used to have. It requires different skills and values to understand the need for change and the different contribution a trusted advisor will make. Some specialists make the explicit choice to remain in the technical domain. Their ambition will then need to be to further specialize along the technical specialist dimension, in order to prevent younger or external people to take over their roles.

Becoming a strategic business partner

Dave Ulrich (1996) coined the term of a strategic business partner in the context of redesigning the Human Resource function. The strategic business partner's main role is to engage in "organizational diagnosis, in order to align the functional (HR) strategy with the business strategy". In Ulrich's view these business partners are helping to ensure the success of business strategies through speed of implementation, effectiveness or meeting customer demands.

In our definition the strategic business partner does not only align functional strategies with the business strategy. The strategic business partner also has a compelling point of view how value can be created through new insights and practices from his functional expertise. An example from a global machinery company: a new senior R&D professional joins the machinery company. He is surprised by the number of different machine types that are being produced. He is also intrigued by the fact that the Japanese machinery factory runs its own machine portfolio with completely different specifications and features from the European machinery portfolio. On top of this the list of R&D priorities is long and shows a poor implementation rate. After a few months he also hears from a sales colleague that the company is unable to service their global clients. He shares his surprises with the General Manager and starts laying out the benefits of a global machinery portfolio: one (more focused) R&D project, better offering and servicing of global clients, lower production costs. Jointly they put together the business case for one global machine portfolio and a road map for implementation.

The relationship with clients changes again at the strategic business partner level. It is likely that the relationships become more senior, both internally and externally. The value that is being delivered to external clients becomes more indirect: this value does not meet immediate client needs, but rather serves their long term interests. In the case of the R&D professional, his immediate 'clients' are internal rather external. It requires a great deal of strategic thinking and business knowledge to spot these opportunities. It is more likely that the strategic business partner has acquired this knowledge and thinking capability externally rather than internally. Therefore he needs have an information rich external network that keeps him up to date. Much of the challenge to really make his ideas happen, he will need to map stakeholders and influence them to adopt his ideas. Building C level relationships is a key ability: feeling at ease in boardroom environments, being able to have an engaging conversation in which one builds trust and feels at ease to challenge early on as well.

It is a rare combination of skills and knowledge and therefore it is very well possible that the strategic business partner is not a full time employee in one company. They may be external consultants or hold positions at universities, research labs or knowledge centers. If the strategic business partner are employed, it is likely that they become direct advisors to the board or that a senior management role is being considered. In professional service firms, strategic business partners may well become the industry thought leaders who write and speak about their latest insights and thereby generate much sought after free publicity. They position the company as a thought leader in their field and thereby generate business as a spin off.

Implications for organizational development

The core benefit of this model for a professional career path is that it allows true specialists to progress in their careers, without taking on managerial responsibility. Unfortunately many technical specialists aspire to managerial roles for all the wrong reasons: status and career progress, rather than capability and motivation to manage. The main reason is, because the specialist career path has not been developed with the same sophistication as the managerial career track in many companies including professional service firms. A lot of value gets lost by companies promoting their best specialists into managerial roles, without properly reviewing their managerial capability. It leaves many people unhappy: direct reports for receiving poor leadership, bosses who see their newly assigned managers fail and last but not least technical specialists who become out of touch with what they do best: creating value through their technical expertise.

The framework for the specialist career track also informs the design for a very successful development program. In a separate article this program will be fully reviewed. It will be very useful to test these findings and the framework for specialists career tracks in other industries, especially professional service firms.

Literature

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*Gert-Jan van Wijk is the initiator of 'the **world we work in**' a global network for executive learning and an associate of London Business School and 'de Baak Management Centre VNO-NCW'.*