

# Technical Experts to Strategic Leaders

Dr. Alan M. Patterson, President  
Mentoré



MENTORÉ

# Poll

What is your position?

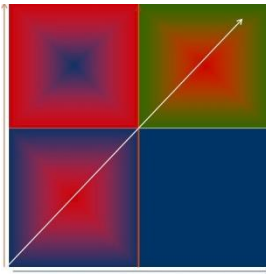
- a. HR or Training Manager or above
- b. Trainer
- c. Individual contributor in technical function
- d. Manager or above in a technical function

# Today's Objectives

- Describe the roadmap from technical expert to strategic leader
- Discuss the necessary shifts in mindset and behavior
- Describe four exercises for immediate application

# Leader Evolution

*Technical experts succeed because they apply their knowledge and expertise to achieve results.*



*Strategic leaders, however, succeed because of their ability to create the conditions for others to succeed.*

# Poll

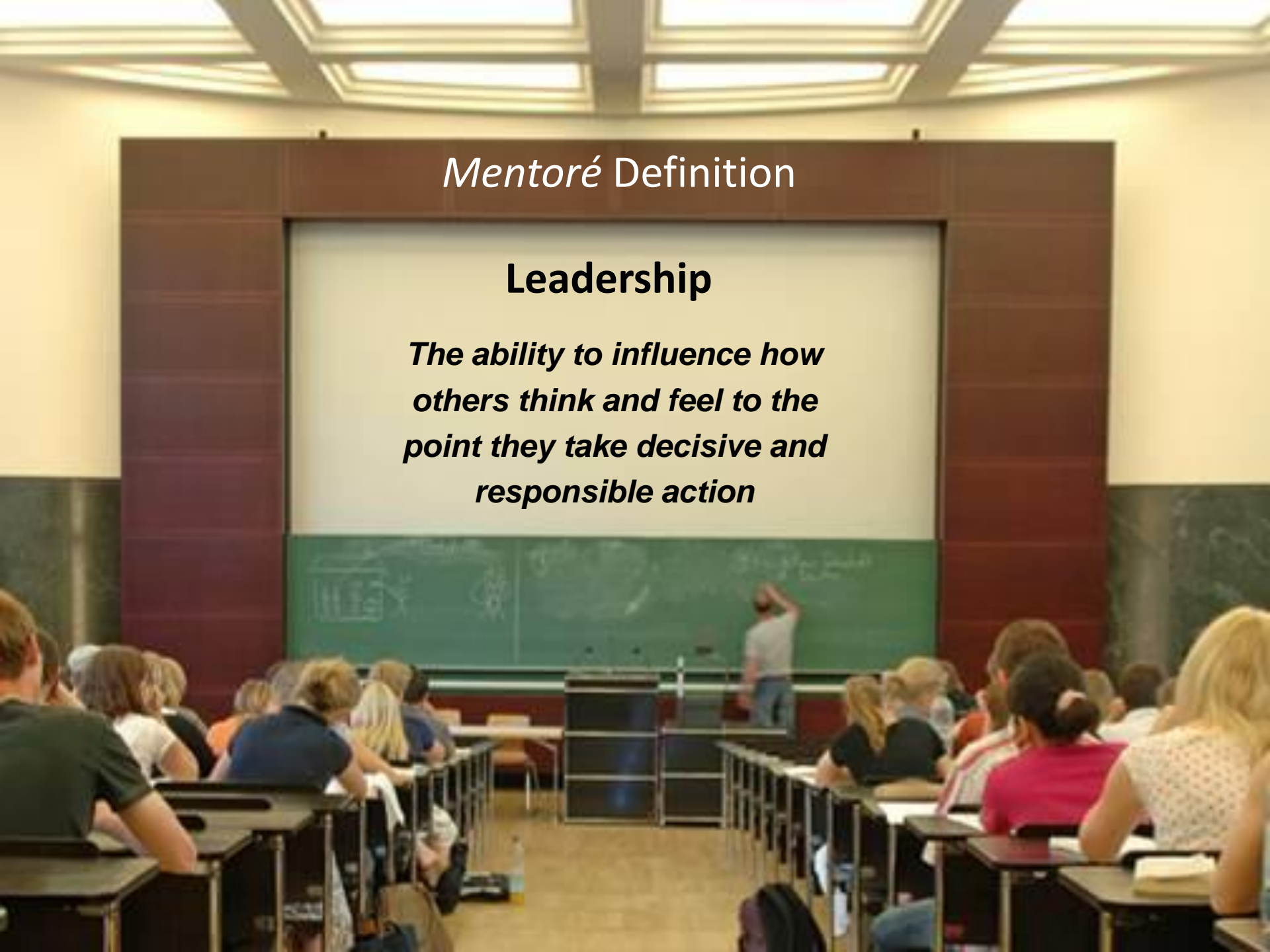
What is the biggest challenge you see for individuals moving from technical experts to strategic leaders?

- a. Lack of leadership training & development
- b. Inability to delegate effectively
- c. Lack of role models
- d. Failure to build and manage relationships successfully

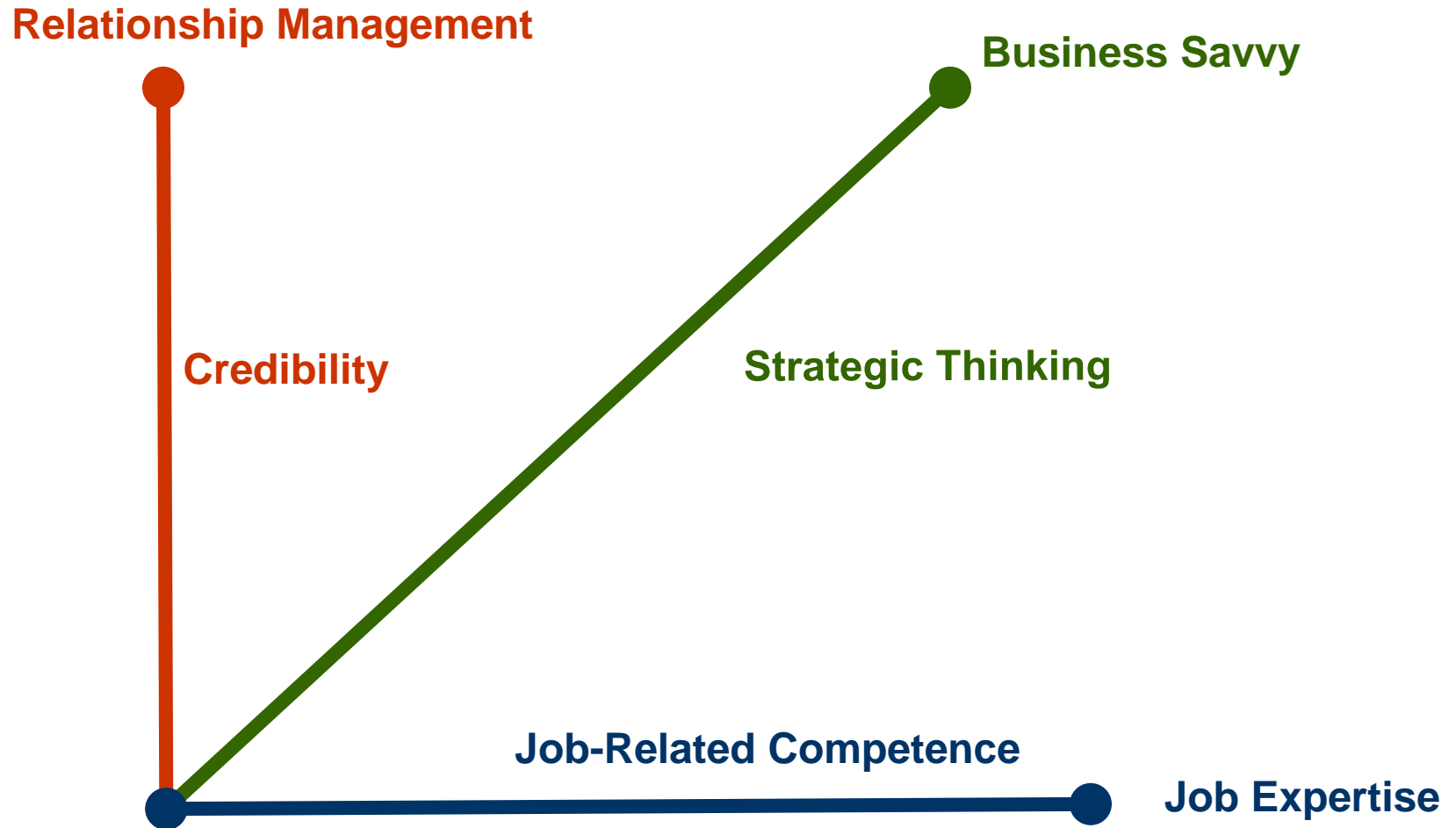
## *Mentoré* Definition

### **Leadership**

*The ability to influence how others think and feel to the point they take decisive and responsible action*



# Leadership Dimensions



# The Mentoré™ Leadership Stages of Development

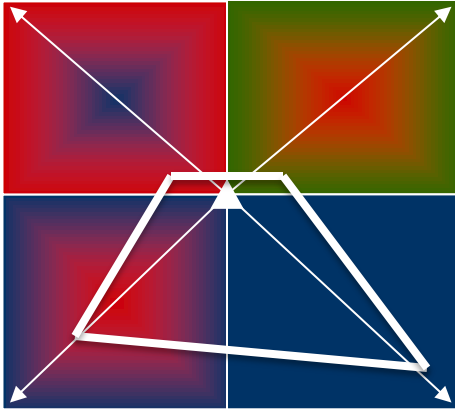




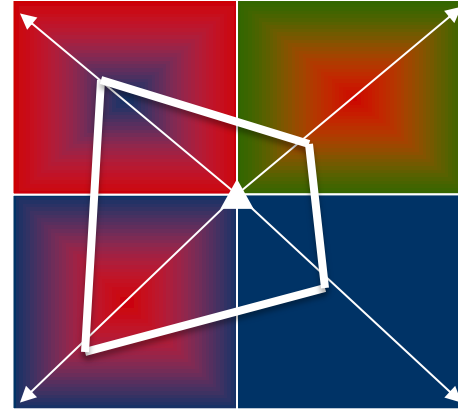
# Leadership Roles & Responsibilities

<p style="text-align: center;"><b>Alignment &amp; Execution</b></p> <ul style="list-style-type: none"><li>• Manage team performance</li><li>• Improve quality &amp; operational efficiency</li><li>• Manage change across the organization</li><li>• Implement large scale projects</li><li>• Develop talent</li></ul>	<p style="text-align: center;"><b>Strategy</b></p> <ul style="list-style-type: none"><li>• Monitor trends : marketplace, customers &amp; competitors</li><li>• Develop and deploy strategy</li><li>• Develop strategic partnerships</li><li>• Develop new ventures</li><li>• Consult to the business</li></ul>
<p style="text-align: center;"><b>Credibility</b></p> <ul style="list-style-type: none"><li>• Stay in front of customers</li><li>• Expand networks</li><li>• Increase visibility to senior management</li><li>• Add credentials</li><li>• Lead cross-functional projects</li></ul>	<p style="text-align: center;"><b>Expertise</b></p> <ul style="list-style-type: none"><li>• Learn the job</li><li>• Stay up to date in field</li><li>• Convey timely, accurate information</li><li>• Master processes &amp; procedures</li><li>• Deliver timely &amp; accurate results</li><li>• Commit &amp; execute effectively</li></ul>

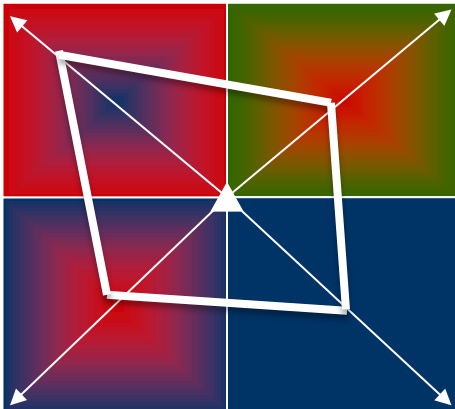
# Leadership Profile Examples



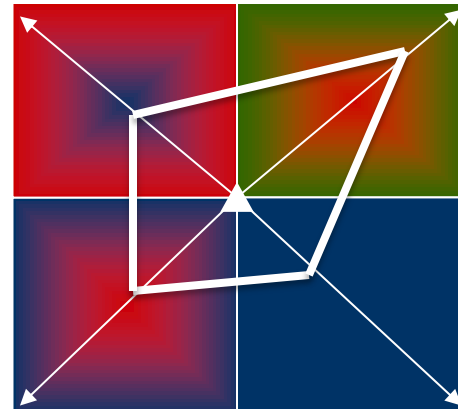
Analyst



Project Manager



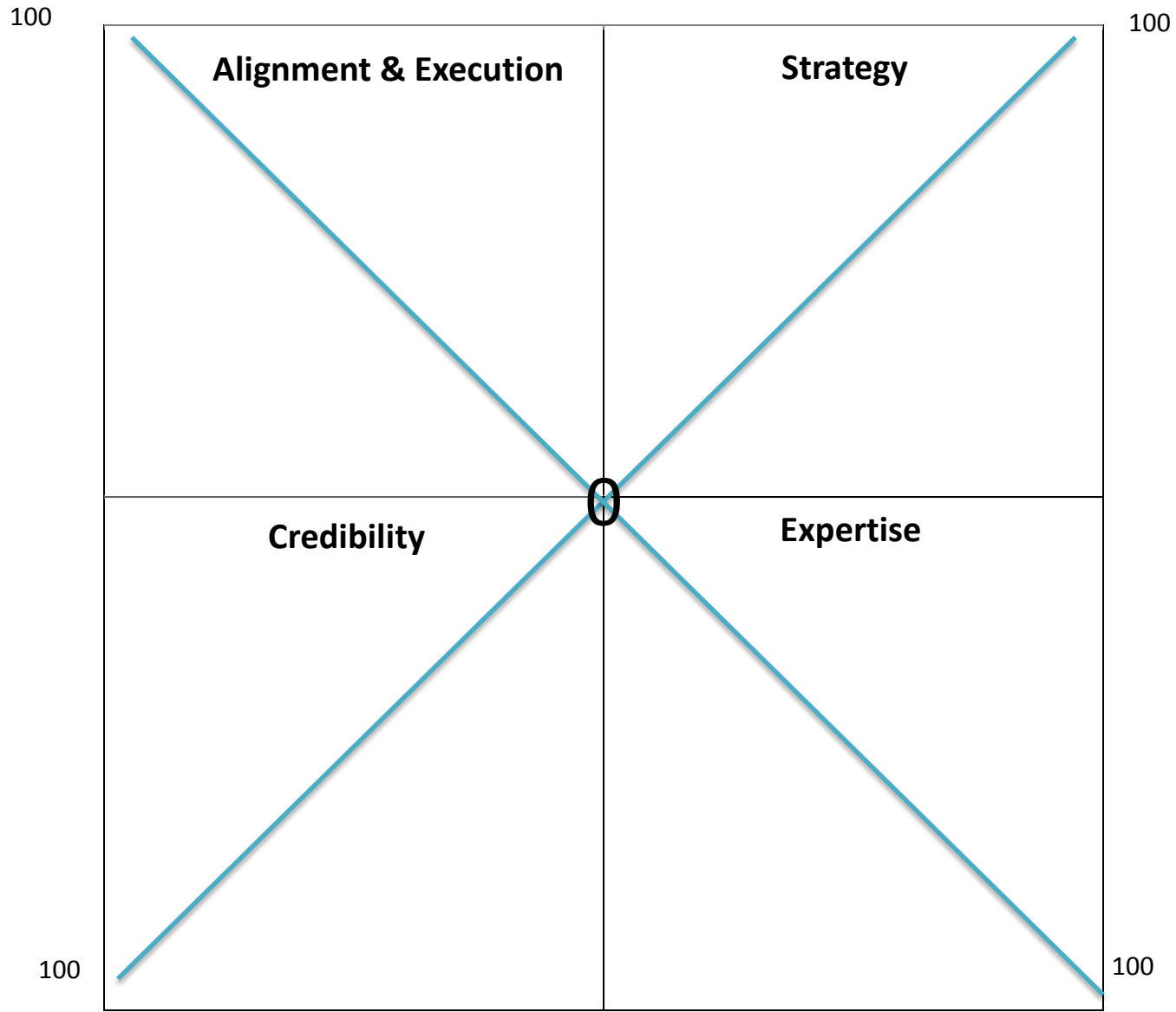
Director



Executive

# Job Profile Exercise

Determine the % of importance you attribute to each stage based on the time you currently spend. Plot those numbers to create *current profile*. Consider the % of importance you attribute to what ***the job should be to provide maximum impact***. Plot these numbers to create a *future profile*. What adjustments are required? What do you need to do more of? Less of?



# From Technical Expert to Strategic Leader

## What's Important

Expertise	Credibility	Alignment & Execution	Strategy
<i>What?</i>	<i>Who?</i>	How	Why?
Track record	Image & reputation	Coaching	Seeing the Bigger Picture
Knowledge & experience	Communication & influence	Developing a culture of accountability	Insights applied to the business
Depth	Breadth	Agility	Calculated risk taking
Student of "stuff"	Student of people	Student of the organization	Student of the business
Native intelligence	Emotional intelligence	Systems thinking	Strategic thinking
How smart you are	How you deliver value to others	How to Maximize operational efficiencies	How to work as a partner & strategist to the business
Knowing your subject matter	Knowing your audience	Knowing your organization	Knowing the business

# The First Shift



# From Technical Expert to Strategic Leader

## What's Important

Expertise	Credibility	Alignment & Execution	Strategy
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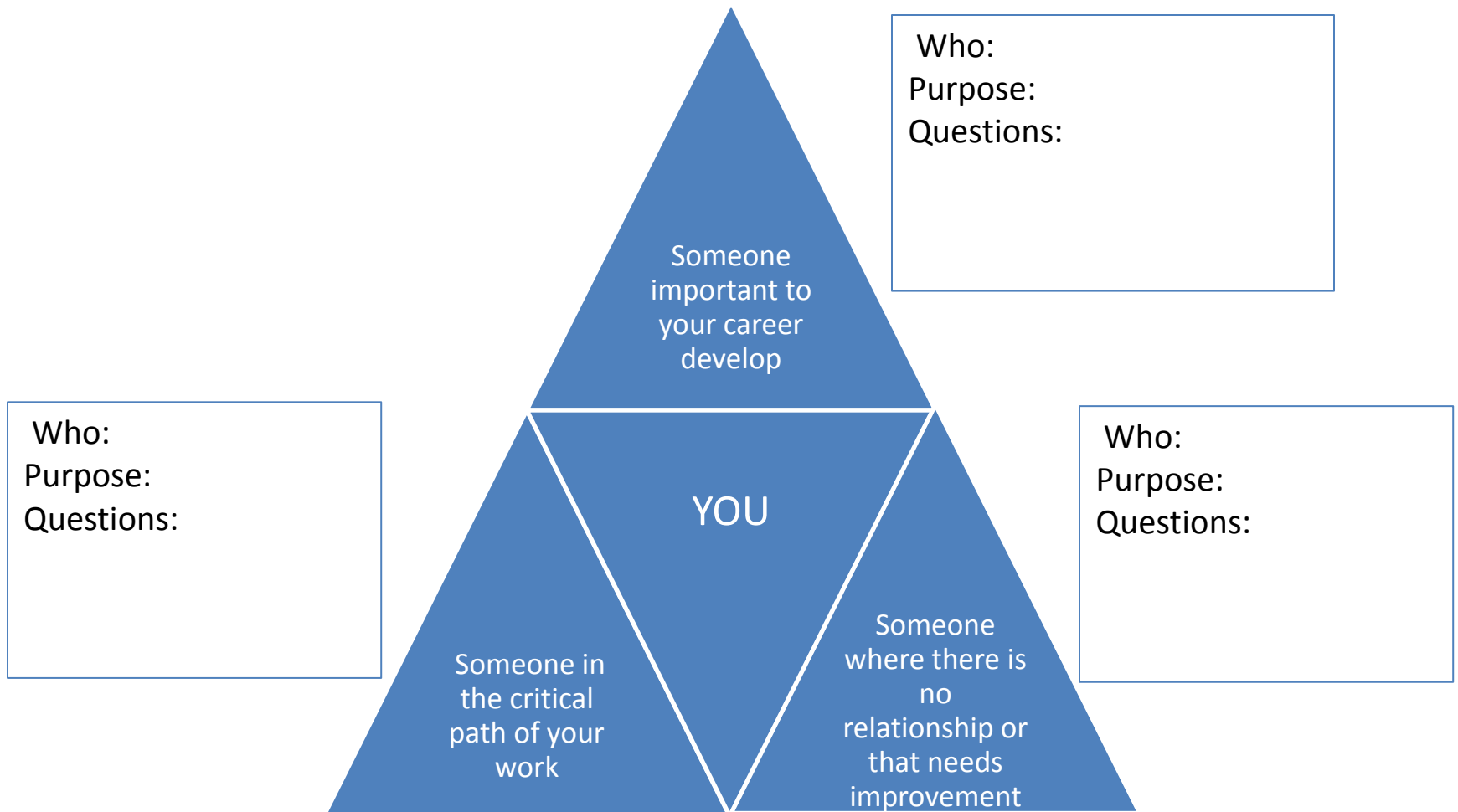
# Critical Credibility Skills

- Active listening
- Effective influence
- Building and managing relationships



# Credibility Exercise

Identify 3 individuals with whom you need to build credibility. Define the purpose of each discussion. Prepare questions. Engage in a dialogue. Listen like there's no tomorrow. Decide best how to follow up.





Question:

*What's the difference between a strategic leader and technical expert?*



Answer:

~~*More technical expertise*~~

~~*The best doer*~~

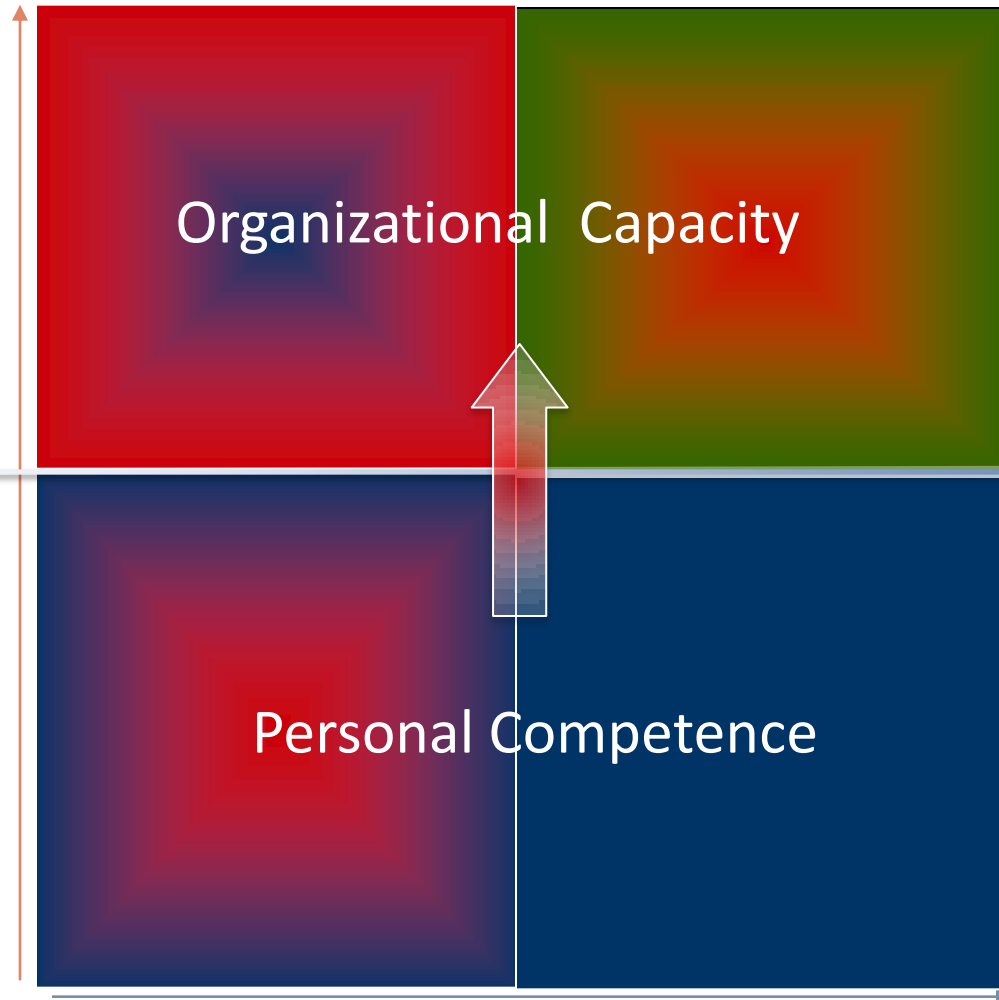
*A huge leap*

# Poll

When looking to select a manager or leader from a pool of technical experts, what skills or competencies do you think are most critical? (choose 1):

- a. The best and the brightest
- b. Successful track record
- c. Emotional intelligence
- d. Highly productive

# The Leap Defined



# The Conundrum of Building Organizational Capacity

*What you gain, what you give up*



# A Change in Roles



# A Change in Perspective

From the Press Box  
**Alignment**

On the Field  
**Execution**

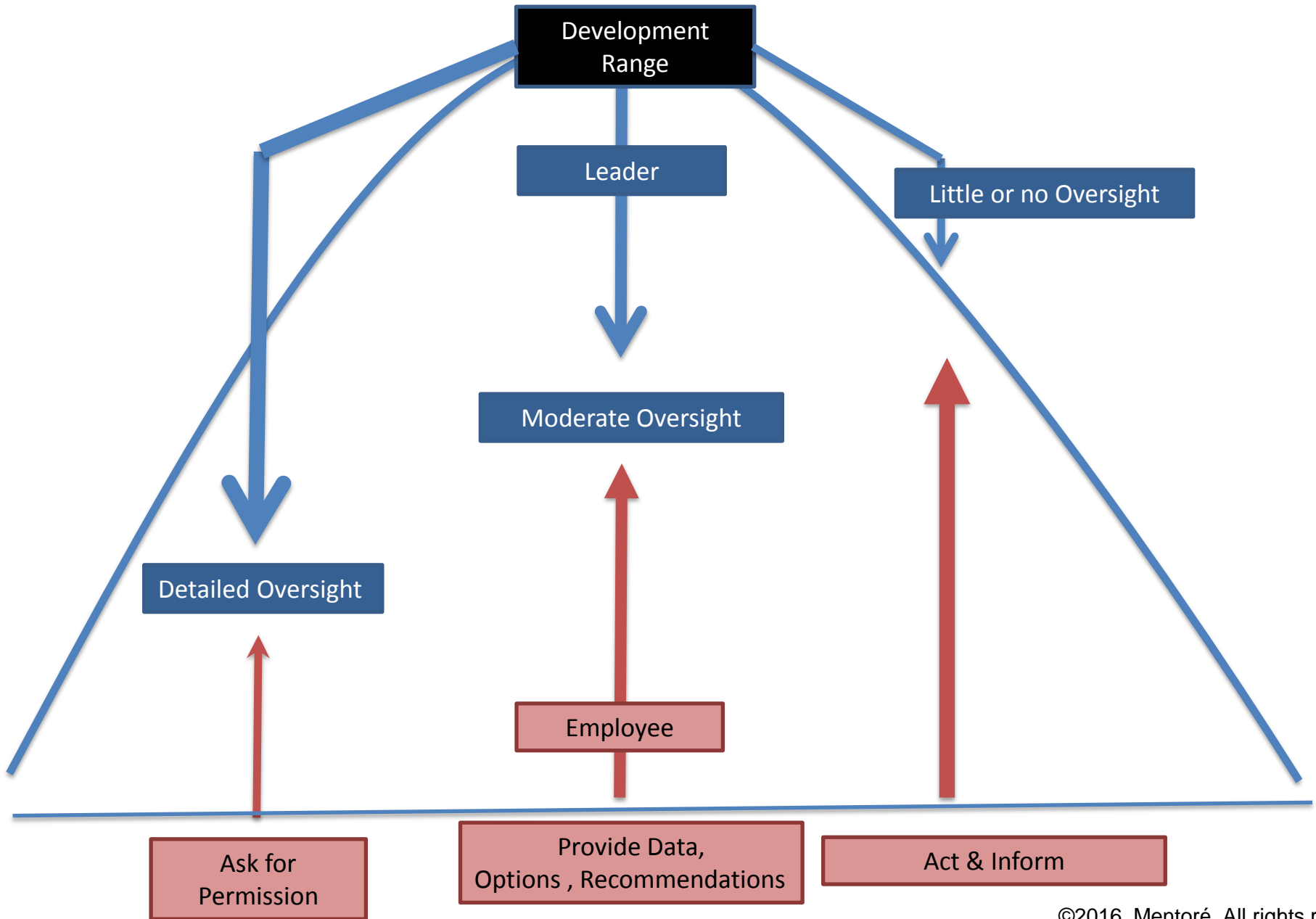


# The Defining Skill Set

## Talent Development

- Builds team member competence
- Increases organizational capacity
- Broadens leader's impact
- Requires solid coaching skills, particularly on-going feedback
- *Requires a delegation mindset*

# Degrees of Delegation





# Delegation Exercise

Look at your schedule for next week. Choose one task in each area. Determine 1 )who to delegate to based on their capability and development needs, and 2) how best to provide oversight required. *What if you were to do this every week?*

Tasks with little or no oversight

Tasks with moderate oversight

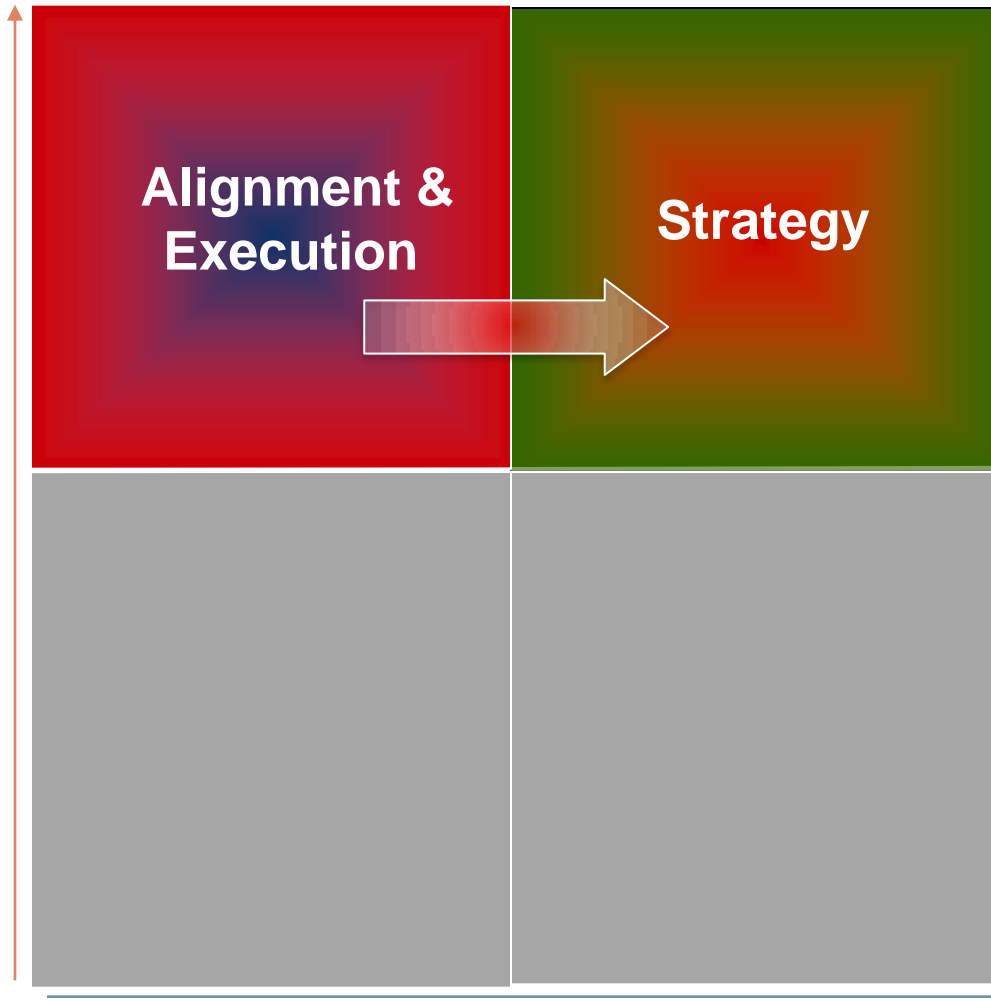
Tasks with detailed oversight

# From Technical Expert to Strategic Leader

## What's Important

<b>Expertise</b>	<b>Credibility</b>	<b>Alignment &amp; Execution</b>	<b>Strategy</b>
<i>What?</i>	<i>Who?</i>	<i>How?</i>	<i>Why?</i>
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# Shift to a Strategic Perspective



- Strategic thinking
- Business savvy
- Walk in the customer's shoes
- Partner & strategist to the business

# From Technical Expert to Strategic Leader

## What's Important

Expertise	Credibility	Alignment & Execution	Strategy
<i>What?</i>	<i>Who?</i>	<i>How?</i>	<i>Why ?</i>
Track record	Image & reputation	Role as coach	The bigger picture
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# Partner & Strategist Exercise

What are the trends and other external factors that impact your organization?

With whom do you need to engage to understand these issues & what the impact could mean?

What are the implications for your role?

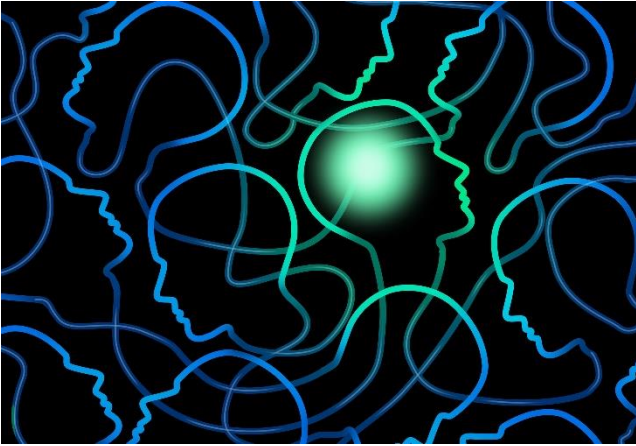
Create a strategic vision

The diagram consists of four light blue rectangular boxes stacked vertically. Each box is connected to a question on the left by a blue curly bracket. The questions are: 'What are the trends and other external factors that impact your organization?', 'With whom do you need to engage to understand these issues & what the impact could mean?', 'What are the implications for your role?', and 'Create a strategic vision'.

# Leader Evolution Defined

Expertise	Credibility	Alignment & Execution	Strategy
<i>What?</i>	<i>Who?</i>	<i>How?</i>	<i>Why ?</i>
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# *What Changes?*



Thinking



Perspective



Behavior

# Poll

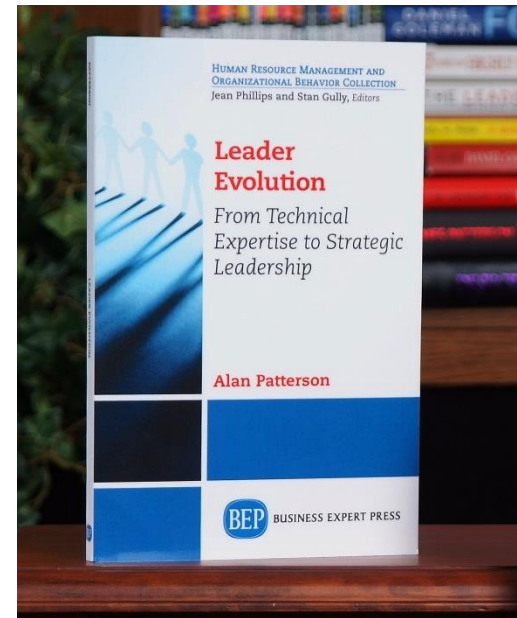
Which skill or competency do you think is hardest to develop? (choose 1)

- a. Analytical thinking
- b. Strategic thinking
- c. Influence
- d. Delegation





To receive your free copy of *Delegation as a Mindset*,  
a white paper that describes practical delegation  
techniques, please contact  
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401.965.8347



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