

Meeting the Challenge of Moving from Technical Expert to Leader

Barbara J. A. Eiser

For technical professionals, some of the most challenging leadership development opportunities arise when they are moving from being subject matter experts to assuming leadership positions. This is true across a broad range of technical areas, including information technology, finance and accounting, research and development, operations, supply chain, law, and medicine. As professionals in such areas move into leadership roles, their challenges largely arise from the fact that in their previous roles they put a strong emphasis on using data and logical reasoning. Learning the soft skills leaders use to manage people and teamwork—such as showing empathy and listening well—is typically not part of their education or training, and in many cases these skills do not reflect their natural preferences.

What are the key factors needed for technical professionals to successfully navigate from the role of subject matter expert to that of leader? To find some answers to this question, I recently served as the moderator of a panel discussion for a professional organization and interviewed four leaders in major global pharmaceutical companies regarding their career paths. All of them hold M.D. or scientific Ph.D. degrees. One is a senior

vice president overseeing global safety and labeling, another is an associate director of pharmaceutical development, the third is a vice president of clinical pharmacology, and the fourth is a vice president and scientific lead in a medical specialty company.

The panel discussion kicked off with each leader providing a brief career history. One panelist's career path was fairly traditional, beginning as a bench scientist in a pharmaceutical company and gradually moving up in the organization. Some of the other panelists experienced unexpected twists and turns; for example, one was a researcher in the United Kingdom who then worked on a research grant in Africa before emigrating to the United States and beginning work with a major pharmaceutical company. Another was a physician in private practice whose weekends and nights were often interrupted by calls from patients; she decided a career in pharmaceutical research would provide a more predictable schedule.

After the introduction the leaders answered a series of questions about leadership turning points, success factors, and challenges. Their answers provide insights into how technical professionals can successfully move into leadership roles.

Q: From being a scientist, what eventually motivated you to seek a leadership position?

All four leaders emphasized the opportunity that a management career

provided to satisfy their intellectual curiosity. They all had a need for variety in their work, which is not always possible in the often highly routine work involved in laboratory positions. Other factors included having a charismatic boss as a role model, working in a team environment, having more control of their own lives, and being able to benefit many patients through research rather than just a few patients through individual medical practice.

Q: In moving into your first management position, what were the major personal and organizational factors that helped you succeed?

In addition to feeling confident that they were recognized as technical experts in their specialty areas, all four panelists mentioned a host of interpersonal skills and attitudes that CCL research has found to be essential in successful leaders. Their key success factors included developing trust in and reliance on direct reports, peers, and other key individuals; establishing good support networks of colleagues within their organizations; receiving support from their managers; having a mentor; working well in teams; and constantly using their soft skills. Other factors mentioned by the panelists were understanding organizational boundaries, not complaining when situations do not go your way, thinking about ways to help others, and wanting to see everyone succeed. All four also expressed the importance of being willing to take risks, of knowing who was willing to

Editor's note: In Focus is an occasional series that takes close looks at specific topics of importance to leadership and leaders.

take the risks with them, and being able to question themselves and reflect on what they bring to the table.

Q: Did any of these factors take on more importance or change as you moved up through the leadership ranks?

Panelists said the factors that took on more importance or changed included having a supportive boss, having access to a good mentor, having trusted direct reports, and being organizationally aware.

Q: What were the major personal and organizational challenges as you moved to a leadership role?

The most common challenges revolved around communication issues such as the importance of keeping channels open with superiors, peers, direct reports, and other people across functional areas, and the importance of communicating the appropriate amount of information to various audiences on a regular basis. The panelists also mentioned the difficulty of obtaining constructive feedback, particularly from direct reports and peers.

Q: What do you find to be the greatest sources of satisfaction in your current leadership role?

All four panelists mentioned being motivated by helping individuals and teams succeed as a way to magnify their own efforts. They mentioned their need for intellectual stimulation and opportunities to take on new challenges.

Q: What suggestions do you have for working technical professionals who are considering moving into management?

Several strong themes became apparent here. The panelists emphasized several key success factors: having mentors, being part of a support network, being willing to take risks, using a failure as a learning experience, and talking to others about their interests and possible opportunities. The panelists also mentioned the value of understanding your own motivations, asking for what you want, and being true to

yourself. Finally, they mentioned the importance of being unafraid to move laterally for an interesting position or experience.

MORE IDEAS

What are some of the other behaviors that technical professionals can adopt or strengthen to help them use their soft skills to successfully navigate the transition from subject matter expert to leader? Based on my executive coaching experience with technical leaders, here are some ideas:

Recognize the Fact That Facts Are Not Enough

Understanding the motivations and concerns of superiors, peers, direct reports, and other key stakeholders is a crucial component of gaining their support to accomplish your goals. So it is necessary to learn about each person as an individual and to balance that person's tasks with his or her needs.

Remember That Communications Are Key

There are many aspects of effective communications, the most important of which is to know your audience and tailor your message to it. This does not mean trying to change or distort the facts; rather it means stating the facts in a way that will make sense to the audience.

It is also important to be clear in both verbal and written communications. When speaking or sending an e-mail, for instance, think first about the purpose of the message. Is it purely to inform, or is there a need for a response, agreement, or action from the recipient? Also be sure to incorporate the appropriate level of detail for the audience. For example, technical leaders often have to overcome their natural inclination to give too much information to their superiors. It is important to provide only

the major points and to be ready to give additional details only if the boss asks for them.

Frequency of communication is another important factor. It is common for technical experts who aspire to or are in the process of assuming leadership roles to perform challenging work successfully and then assume that the work will speak for itself when it comes time for performance reviews. Unfortunately, the work cannot speak for itself—so these aspiring leaders need to let their managers and other key stakeholders know about their individual or team accomplishments.

Delegate to Leverage Your Resources

Subject matter experts promoted to leadership roles often have trouble letting go of fulfilling the technical responsibilities themselves. This can lead to long work hours, frustration, and fatigue, which in turn can lead to a lack of motivation and even to burnout. In addition, the failure to delegate often prevents direct reports from further developing their skills and can lead to resentment and complaints of micromanagement.

Given the leader's need to control the quality outcome of the work while empowering his or her direct reports, two approaches can be particularly helpful. The first is to carefully consider which tasks, even if they are initially small, can be comfortably assigned to direct reports who have the requisite skill sets. This type of delegation can help you stretch beyond your comfort zone and can eventually become a base for increased success. The second approach is to meet with each direct report to review the delegated tasks, along with the goals and outcomes you expect, and to arrive at a joint agreement.

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Build Relationships and Networks

One of the most important aspects of leadership is to build and maintain relationships with key stakeholders and colleagues, not only within your division and company but also outside the organization. These relationships result in the mutual support that is crucial when leaders must accomplish goals and objectives beyond their own teams' resources, when they are trying to influence senior

management or keep up with internal power shifts, or when they are developing support for career advice and advancement.

BALANCING ACT

Technical professionals in a broad range of fields are often challenged as they move from the role of subject matter expert to leader. This is largely because their background and training dispose them to rely on facts and logical reasoning and to attend less to the people-oriented aspects of leadership. Fortunately, these professionals

can successfully navigate the transformation to leadership by changing their behaviors so they can establish a better balance between tasks and people. ✍

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Are There Any Pitfalls to Emotional Intelligence?

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frequently about Ken's ability to know what to say and when to say it. In short, Ken is a cool customer. He rarely speaks before thinking and has tremendous control over his behavioral and emotional responses, even in high-stress situations. He meets people easily and they warm to him quickly.

There is one problem with Ken, though, and it's a big one. It's all about him. His EI is used to build

power bases in the organization so that his influence increases in a way that feeds his sizable ego. The people around him become dedicated to him rather than to the organization, and at times their loyalty to Ken causes them to work at odds with the larger organizational goals.

Intelligence in general (and emotional intelligence in particular) is known to have many facets. Although having the competencies associated

with EI can potentially provide leaders with the tools to be intrapersonally and interpersonally effective, it is rare that anyone has all of the competencies of EI in equal amounts. Being aware of where one is strong and weak within the EI framework, as well as knowing when, where, and how much of those competencies are appropriate and how much they should be applied in any given situation, allows leaders to be consciously competent in the use of their EI. ✍

Leadership Beyond Leaders and Followers

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results (though not necessarily the same decisions) they might have gotten if one of them had assumed a leader role and persuaded the group what to do.

BIGGER PICTURE

Thinking about leadership in this kind of collaborative context means understanding how "talking about what to do" can be a leadership process no

less important than the process of a leader influencing followers.

Thinking this way encourages us to ask, Which beliefs do people need to hold and what specific practices do they need to engage in to produce direction, alignment, and commitment without a leader?

By reframing how we think about leadership from a leader-follower influence process to a DAC-producing process (which may include a leader-follower process), we can create a bigger picture of leadership that includes

useful ways—who knows, maybe some useful new ways—for people to work together effectively. ✍

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