

THE WAR FOR TECHNICAL TALENT

HOW THE RISE OF ORGANISATIONAL EXPERTSHIP IS HELPING
HIGH PERFORMING ORGANISATIONS DRIVE NEW LEVELS OF
ADVANTAGE AND RETENTION THROUGH THEIR TECHNICAL TEAMS.

EXPERTUNITY

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The Expertunity drive is to help one million experts around the world improve their lives and reach their full potential. We have worked with 2000 experts in Australasia, the UK and the US through our [developmental programs](#), [coaching](#) and [360° feedback](#). To lift the impact of one million experts, our work is also to help organisations better understand and support their experts.

EXPERTUNITY

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IS YOUR ORGANISATION LOSING THE NEW WAR FOR EXPERT TALENT?

The demand for technical experts, irrespective of their subject matter focus, has never been higher. Demand has been accelerated by the myriad of complex problems and opportunities which almost every organisation – whether private or public – faces today. If your organisation is typical, its future success depends increasingly on the quality and capability of the technical experts it can attract, develop, and retain.

Innovation is no longer a 'nice to have'.

Furthermore, whether your organisation serves the community or customers, the drive to find efficiencies and create new value is unrelenting. Innovation is no longer a 'nice to have'. In most organisations, this innovation is driven by the potential seen through the deep expertise and knowledge of your technical experts.

Beyond specialists in science and technology, experts are everywhere in most medium to large organisations: departments such as legal, finance, risk, customer service and sales professionals, as well as education, and the social sciences.

But, according to our research, most organisations have failed to appreciate the mission-critical changing importance of technical experts to their success. Many organisations have *one size fits all* settings for generalists and experts alike when it comes to critical employee life cycle policies and processes – recruitment, onboarding, talent development, remuneration, career pathing, and even the way in which expert teams are led.

Yet the data is clear: a *one size fits all* strategy is disastrous for attracting, developing, and retaining top technical experts. It is disastrous when it comes to organisations leveraging full value from their experts. It is fatal when it comes to the organisation delivering on its innovation agenda.

Organisations who are missing the boat when it comes to creating the optimum environment for technical experts to create the most value, are afflicted by a range of problems (see Exhibit A).

Instead of boasting a technical expert population that drives organisational success, identifies the solutions that achieve strategic targets, and creates value-creating points of differentiation for the organisation, these organisations are challenged by their best experts leaving, and an increasing difficulty in bringing in new talent.

What are the optimal workforce practices to attract, retain and get the best value from the best technical experts?

Deploying **Organisational Expertship** provides organisations the opportunity to make the changes that lead to

the optimum workforce practices, policies, and strategies to attract and retain the best experts and develop them to their full potential.

The sooner your organisation acts, the sooner it will be able to secure and fully leverage the expertise critical to its future. In this whitepaper, we explore the arguments and proofs to enable leaders and organisational development professionals to design a cogent, undeniable business case to turn around your expert brain drain, and to be an employer of choice for technical experts.

Assessing Your Organisation's Expert Risk Profile

	My organisation is:	No (1)	Maybe (2)	Yes (3)	Score
1	Increasingly dependent on the contributions of technical experts	1	2	3	
2	Finding it more difficult and expensive to attract talented technical experts	1	2	3	
3	Finding it more difficult and expensive to retain talented technical experts	1	2	3	
4	Struggling to engage and motivate our experts to achieve their full value-creating potential	1	2	3	
5	Facing a looming brain drain	1	2	3	
6	Struggling to ideate and execute an innovative agenda	1	2	3	
7	Running a talent process that focuses on people leadership stars to the exclusion of technical stars	1	2	3	
	Total				

Total your points

- If you have scored 9 points or less, you appear to have advantageous organisational Expertship settings for technical experts in your organisation.
- If you have scored between 10 and 14 points, it is likely you have some underlying organisational Expertship issues which ought to be addressed as soon as possible.
- If you have scored 15 points or more, it is likely you have some serious Organisational Expertship issues which must be addressed immediately to avoid a significant depletion of your internal expert resources.

This questionnaire is a simplified version of a much more comprehensive audit process that Expertunity Consulting runs for clients to assess their real state of Organisational Expertship.

The challenge of maximising expert potential

Organisational Expertship (OrgEx) is a subset of a wider workforce strategy. Its central thesis is that technical experts need *different organisational settings* from generalists.

The levers we pull deploying OrgEx are not revolutionary, but a very necessary and urgent evolution as the world becomes increasingly dependent on science, technology, and other areas of expertise.

The big question we are suggesting that organisations ask, is this: are we failing our experts, and therefore failing to leverage their expertise? (See Exhibit B).

Sadly, our research suggests the answer for most organisations today to this questions is ‘yes, we are failing our experts’.

Experts need different organisational settings from generalists.

The good news: our research suggests that by deploying some or all of a series of Organisational Expertship initiatives, organisations can make changes to workforce practices and policies that will lead to significant and disproportionately improved outcomes for their experts, expert teams, and the organisation overall.

A NEW MINDSET

But OrgEx requires a significant change in mindset from many senior leaders in the organisation about the value and role technical experts play. Often expert contributions are invisible to senior leaders. The role of technical managers, OD folks – and the experts themselves – is to make these expert contributions more visible to everyone in the organisation. Some of the required changes in mindset are often counter-intuitive for many leaders.

By way of example, optimum practices include:

- Greater autonomy for experts in decision-making.
- Greater and wider participation for experts in strategy development.
- Changed culture settings that encourage an increase in the socialisation of information and ideas between expert groups and the wider organisation.
- Far more collaboration on increasingly complex problems and solutions across different expert groups and the wider organisation.
- Embracing diversity in all of its forms – leveraging the full capability of different ways of working and thinking.
- Finding the balance by customising workplace practices that work for individual experts, expert teams, and the group as a whole.

Another challenge for successfully implementing OrgEx is taking a holistic approach. In Exhibit A and B, you may have said ‘yes’ to some questions or statements, and ‘no’ to others. The highest performing organisations when it comes to OrgEx understand that all of the levers need to be correctly positioned to produce extraordinary technical expert outcomes. Their audits tick every box.

The truth is, in our five years of research and experience from working with more than 2000 experts and 30 large organisations globally, we know that awareness of OrgEx is not well known and understood.

Yet, OrgEx offers the organisation the ability to achieve greater competitive or community advantage through fully leveraging its internal expertise and knowledge of the experts the organisation already employs. Correctly approached, we see most CFOs or CEOs are keen to embrace Organisational Expertship and get the maximum value from their best experts. After all, the future success of the organisation is at stake.

How well are we catering to our technical experts' needs?

	In my Organisation I see:	No (1)	Maybe (2)	Yes (3)	Score
1	In our talent process, potential is defined as the ability to manage more people, not the ability to add or enhance value.	1	2	3	
2	A technical ceiling which forces experts to become people leaders to gain career progression and income increases.	1	2	3	
3	Training budgets allocated on a per head basis, with a focus on leadership potential; rather than higher investments in training in pursuit of technical leadership.	1	2	3	
4	Experts viewed as service providers to strategic decision-makers, not as strategic partners. Technical experts rarely have a seat at the strategic table.	1	2	3	
5	Organisational structures and policies are optimised for the enforcement of authority over the transmission of ideas and knowledge.	1	2	3	
6	Traditional top/down decision authority, rather than authority vested in the most capable person in each case.	1	2	3	
7	Running a talent process that focuses on people leadership stars to the exclusion of technical stars.	1	2	3	
	Total				

Total your points

- If you have scored 9 points or less, your organisation appears to have settings that respect and value the contribution technical experts can make. That makes you 1 in 10!
- If you have scored between 10 and 14 points, it is likely your organisation has some positive settings for technical experts, but these are unlikely to attract and retain top technical talent. Your experts will be unhappy and unsettled.
- If you have scored 15 points or more, it is likely your organisation is already experiencing – or is about to – an expert brain drain, which will cost your organisation reputation, money, and growth.

The Clear ROI of Organisational Expertship

Current talent systems have proven effective and equitable for generalist employees and leaders, but they absolutely have not been appropriate for experts.

To date, workforce research that relates to subject matter experts fits into two camps: global skill gaps and the difficulty in recruiting technical talent.

Expertunity defines the expert challenge differently:

How can organisations facilitate their experts to maximise expert potential and value to the organisation?

In order to deploy the right OrgEx settings, most readers will need to persuade senior leaders in their organisation of the organisational benefits, the Return on Investment (ROI), and the Return on Effort (ROE).

The good news is that the ROI is usually high because most OrgEx initiatives don't require a huge investment in new funds. (Indeed, the ROI comes from saving money that is currently being misspent, see Exhibit C.) But OrgEx initiatives do require new thinking and significant effort.

Simple ROI calculations that tell their own story

Costs are estimated for a 2000-employee organisation.

	OrgEx saves money by	OrgEx enhanced setting	Typical cost saving
1	Reducing the cost of recruitment of technical experts	You have a compelling Expert Employee Value (EEVP) proposition that naturally attracts top candidates	\$500,000 ¹
2	Reducing the cost of recruitment of technical experts	You have happy and highly productive experts, who sing the praises of the organisation to external expert contacts	\$125,000 ²
3	Reducing the time to value for newly arrived experts	You have an expert-specific, comprehensive, and intense onboarding process that enables experts to start adding value almost immediately.	\$250,000 ³
	Total		\$875,000

Research Notes

- 1 – Estimated 10 regretted resignations from technical experts per annum (in a population of 400 – 20% of the total workforce) at a replacement hiring cost of \$50,000 per employee.
- 2 – Estimated reduced recruitment costs of 10 experts per annum, assuming recruitment fees are only payable on half because of a positive employment brand, thereby saving \$25,000 per employee.
- 3 – Estimated number of non-productive weeks saved, 6 weeks per expert, at an average annual salary of \$200,000, with 48 weeks effective employment per annum. \$25,000 saving per expert.

A holistic view: Expertunity's OrgEx Model

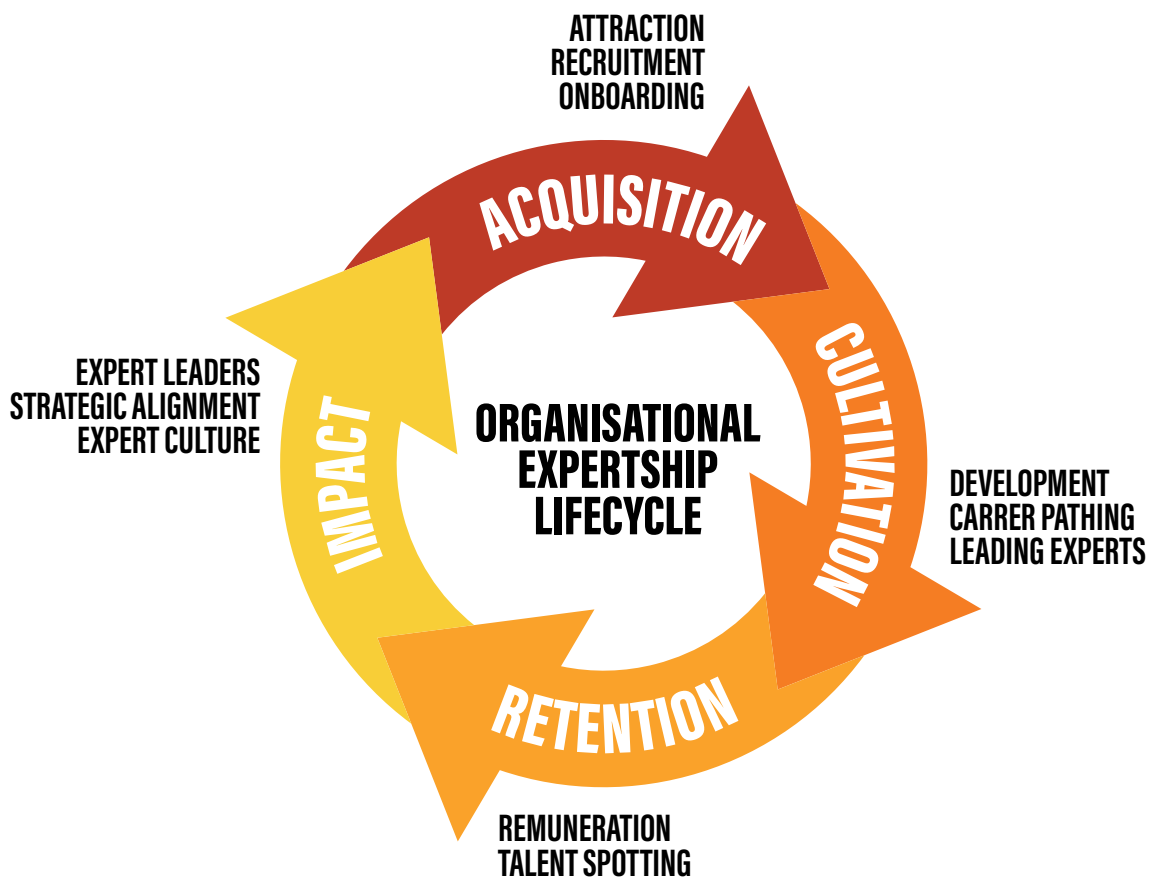
The deployment of OrgEx provides 12 levers which can be adjusted to produce outstanding organisational results from experts.

As discussed before, the highest performers in OrgEx tend to focus holistically on all of these levers, but many organisations choose to start with two or three – ones that for a small amount of effort produce great outcomes.

In this whitepaper, we will provide a high-level view of all 12 levers.

The 12 levers of OrgEx are represented in Exhibit D.

EXHIBIT D: THE 12 LEVERS OF ORGEX



WHAT IS AN EXPERT?

Expertunity specialises in identifying the right candidates for developmental programs and coaching. Our current working definition of an “expert” is an employee with the following attributes.

- Widely recognised as a reliable source of knowledge, technique or skill that is demonstrably greater than that of their stakeholders.
- Have a proven track record in applying this knowledge to real-world problems and opportunities.
- Judgment and insight are accorded authority and status by the public or his/her peers. And their insights are reinforced with facts, data, and evidence.
- Have prolonged or intense experience through practice and education in a particular field with recognised qualifications and credentials.
- Identity is focused on a very specific area of detailed knowledge, developing depth over breadth.
- Costly and extremely difficult for the organisation to replace.

The Expertship 360 Findings – busting stereotypes and identifying opportunities

Between 2016 and 2022, Expertunity worked with almost 2000 experts – supporting their development through coaching, learning programs and 360° feedback. This experience and data have given us [unique insights](#) into the strengths of experts, their most common challenges and several misconceptions.

BUSTING THE EXPERT STEREOTYPE

1. **Not good with people.** Most experts were rated highly regarding their ability to collaborate and build relationships, in particular by their most important stakeholders. But the majority of experts underestimated the number of stakeholders they can influence and under-rate their own positive impact on those stakeholders.
2. **Not creative.** Many experts see their roles as creative, or at least as crafts. To those with skills and knowledge in science and maths, these are experienced as a creative endeavour.
3. **Technology experts like shiny new toys.** Yes, but they aren't the only ones. Think of the HR guru who wants to implement the shiny new structure or theory in organisational development.

DEVELOPMENT OPPORTUNITIES

- The most common areas of development for experts include understanding the competitive environment their organisation operates in, and their ability to lead change by bringing others along on the journey. We spend a significant amount of time working with experts to develop their commercial and/or strategic acumen.
- It is very easy for experts to become invisible or fall under the radar in their organisations. They struggle with visibility and being heard, but this can sometimes relate to their own communication skills and focus on too much detail.
- Due to the previous point, much of the value experts bring to their organisations can go unnoticed.



CYCLE 1: ACQUISITION

OrgEx Lever	Optimal settings for Experts	Elevated outcomes
ACQUISITION	<p>Attraction</p> <ul style="list-style-type: none"> Segmented Employee Value Propositions (EVP) for technical experts, focusing on opportunities to solve complex problems, professional development and working with other internal experts. 	<ul style="list-style-type: none"> Your recruiters will boast a larger pool of talented expert talent compared to competitors. Offer acceptance rates increase. Experts recommend experts, reducing recruitment cost and effort.
	<p>Recruitment</p> <ul style="list-style-type: none"> Generic one-size fits all recruitment practices are not applied to expert positions. Expert success profiles with specific testing regimes. Panel of peers are involved in the whole process design, not just in the interviews. 	<ul style="list-style-type: none"> Sharper focus on exactly what the successful candidate will look like. Better testing processes reduce poor hires. Speed to offer is easier because decision criteria are clear, and less top talent missed or lost through the process. Improved time-to-hire rates, reducing costs.
	<p>On-boarding</p> <ul style="list-style-type: none"> Bespoke onboarding for experts, owned by managers not HR. Experts adding value faster because they are given complex problem-solving early. Experts connect their expertise to the strategy almost immediately. 	<ul style="list-style-type: none"> New experts are productive faster. New experts quickly commit to the organisation, feeling welcome and valued. Increased retention of new hires.

LEVER 1: ATTRACTION

Attracting expert talent is a key source of competitive advantage. To secure them, organisations need to segment their employee value propositions (EVPs) in the same way they segment marketing to their customer base. Organisations need to develop a specific expert employee value proposition (E-EVP).

Key to success in this area is understanding the aspects of a working environment which attracts and fulfil technical talent, and those aspects which are seen as detractors by experts.

Organisations have their own very specific working environments, which vary depending on industry, location, and stage of growth cycle. These will need to be explored by each individual organisation – and here's a hot tip, ask your experts, including those who are leaving via exit interviews.

THE SCARY FACTS ABOUT EXPERT RECRUITMENT

Attracting expert talent is an increasingly difficult challenge as demand outstrips supply. 90% of jobs will require [STEM skills](#) in the next two to five years and closing this gap worldwide could add US\$11.5 trillion to [global GDP](#)

Our research suggests that notwithstanding each organisation's unique situation, there are some very important common attractors and detractors that should be addressed (see Exhibit E).

Experts are attracted to working on the most complex and difficult problems available, not the second most complex. This is their version of hierarchy, and it is how they measure career growth. They also want the time and space to design the right solution for the problem.

As expertise is a continual state of becoming, the best experts are lifelong learners. Regular development opportunities - including working on increasingly complex or larger projects, coaching, mentoring, or working with recognised masters- and fully endorsed learning cultures, are significant draw cards.

ATTRACT OR REPEL?

Understanding the environments in which experts thrive will transform your ability to attract and retain experts.

Experts are obsessed with doing the best they can. To keep their work competitive, they are motivated by having access to the most current tools of their trade. Investments in new technologies may be expensive, but what is the cost of losing talent to competitors offering the latest tech?

EXHIBIT E: ATTRACTORS AND DETRACTORS

Does your expert working environment attract or repel candidates?

While every organisation is different, these factors are in play in most organisations.

ATTRACTORS	DETRACTORS
Time to explore "beautiful" solutions	No difficult challenge on Day 1
Difficult and complex problems	Work activity that won't stretch their capability
Drill down deep into issues	Constant fire fighting
Professional development customised for experts	Egalitarian learning budgets
Access to other experts and masters	Being one of few experts
Participation in key decisions	Top-down only decision-making
Expertise is considered as core to success of the organisation	Expertise is siloed as a corporate office function

CYCLE 1: ACQUISITION

Experts want to work where expertise is respected and seen as essential to the organisation's success. They want to know their domain of expertise is integral to corporate strategies – not primarily seen as a back-office support function. The more they are connected to strategy, the more they will want to be involved in your success.

Understanding the working environments in which experts thrive, and do their best work, and then making that environment real in your organisation, will transform your ability to attract and retain the very best experts.

While there are many initiatives organisations can take to create an outstanding recruitment experience for experts, which enables the organisation to find the right expert talent quickly, we recommend starting with the two initiatives below.

RECOMMENDATION 1.1: **PLAN AN EXPERT-EVP**

Our first recommendation is to plan to build an expert employee value proposition. We hope that reading this whitepaper will provide you with an idea for areas of most immediate opportunity. You can also take our self-audit (see Exhibit F) which enables you to see what you can authentically talk about as attractive to experts today, and plan to be able to authentically talk about tomorrow.

We are not suggesting organisations change their EVPs to focus entirely on attracting more experts. But those professionals must be identified as at least one segment of a wide and diverse mix of candidates and employees. The purpose of stage this initiative is to ensure you don't over-promise and under-deliver on your recruitment attraction strategies.

EXHIBIT F: EXPERT PERCEPTIONS SELF-AUDIT

How might experts in your organisation respond to these questions?

		No (1)	Maybe (2)	Yes (3)
1	I have access to the training and learning opportunities to develop as a leader in my field.	1	2	3
2	My organisation shows a genuine interest in my future career here.	1	2	3
3	I can see more than one interesting career option for me at my organisation.	1	2	3
4	I am happy with the level of recognition I receive for the value I bring my organisation.	1	2	3
5	Remuneration decisions in my organisation are fair and not unnecessarily dominated by your place in the hierarchy and the number of people managed.	1	2	3
7	I feel my field of expertise is valued by my organisation.	1	2	3
7	I understand how my expertise supports the organisation's current and future success.	1	2	3
8	Subject matter experts here participate in the development of business strategy as much as people managers.	1	2	3
9	I feel inspired by my organisation's vision and purpose.	1	2	3
10	I feel like I fit in at my organisation.	1	2	3
11	The leaders of my organisation value evidence and data over a good sales pitch.	1	2	3
12	I would recommend to other experts that my organisation is a great place to work.	1	2	3
13	I have access to the systems, data, and tools I need to fully utilise my expertise.	1	2	3
14	I am empowered to make the decisions necessary to perform my role to the best of my ability.	1	2	3
15	I feel adequately consulted when decisions need to be made related to my field of expertise.	1	2	3
Totals:				

Total your points

- If you scored 24 points or less, your organisation is likely experiencing higher staff turnover among your expert population than your competitors. Many of your experts will be frustrated from not having the impact or influence they feel they could have. Others are likely feeling hidden or unrecognised.
- If you scored between 25 and 35 points, your organisation is a typical organisation. You may excel at a few organisational expertship practices but there are enough other organisations who are doing this better who will be able to poach your top talent. Furthermore, you are not getting the full potential from your experts.
- If you scored 36 points or higher, you have a competitive advantage over most other organisations but there are always opportunities to improve. Your experts are likely performing at high levels and see opportunities to progress and influence real outcomes. However, don't celebrate too long – your competitors will be seeking to improve their own organisational expertship practices.

This questionnaire is a simplified version of a much more comprehensive audit process that Expertunity Consulting runs for clients to assess their real state of Organisational Expertship.

RECOMMENDATION 1.2: **AUDIT HOW YOUR EXPERTS ARE REALLY FEELING**

If your organisation is typical, you'll have some experts who are thriving, some who are stuck, and some who are frustrated and ready to leave. Broad temperature results from engagement surveys won't tell you how your technical expert cohort really think – you have to ask them specifically, using a structure along the lines of our OrgEx Model. Don't worry about “over-surveying” them – this will be the first time you've asked them specifically about their working environment and what they like, dislike, and recommend the organisation do to make it better. Armed with this data, you'll be able to quickly identify quick wins, and what you can and can't say authentically about working as an expert to prospective employees.

LEVER 2: RECRUITMENT

With experts of all types in high demand the recruitment process is as much a sales pitch to the candidate, as it is about finding the right one. For managers of expert teams, recruitment is an ongoing activity that involves relationship building, networking, and knowing where the talent is – working in ways like coaches of professional sports.

All candidates, not just experts, are expecting a hyper-personalised experience. The best recruiters have learned creating *moments that matter* in their hiring process leads to competitive advantage in talent searches (see Exhibit G).

EXHIBIT G: RECRUITMENT MOMENTS THAT MATTER

Can your organisation pass the recruitment test for experts?

		Rarely	Sometimes	Always
1	We take a personalised, inclusive approach to every candidate.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2	The interview process includes a panel of expert peers.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3	We sell the vision, purpose and values of the organisation, and the critical role in which experts help us achieve these.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4	The process includes robust tests for skills, knowledge, experiences, and expert mindset.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5	We balance the above rigour with constant engagement and feedback.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
6	We move fast and decisively.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Many hiring managers do not have access to a specialist recruiter and may not even fully understand the technical skills required for some of the roles they are hiring for. The solution is to include the candidate's potential peers on the recruitment panel.

FAST GAME IS THE ONLY GAME

Too many stages of a recruitment process, or worse, dithering about candidates, is fatal when it comes to recruiting experts.

The only way to be fast and decisive is to really know what you are looking for at the start, and the signs and symbols and data that will help you recognise it.

The immediate and long-term benefits of peer interview panels are:

- Peers may know better than the manager the specifics of the advertised job and the exact skills required.
- The panel can test the candidate for skills and knowledge by solving a current problem.
- Both peers and the candidate can test for a good fit into the high-quality cohort.

Keep in mind, the experts on your recruitment panel may need a small amount of training or guidance before participating. Some may focus entirely on the technical skills of the candidate and may not be aware of their own biases.

It's important to get the balance right between rigour, creating a positive experience and moving quickly. Many experts will enjoy the bragging rights of an interview that poses difficult questions and tests them. But don't prolong the process with multiple interviews – that delay may see them accept an offer elsewhere.

While there are many initiatives organisations can take to create an outstanding recruitment experience for experts, which enables the organisation to find the right expert talent quickly, we recommend starting with the two initiatives below.

RECOMMENDATION 2.1: BUILD EXPERT SUCCESS PROFILES

A success profile is a sophisticated – but easy to develop – tool for describing the exact candidate you are looking to recruit. Regularly deployed for senior leadership positions, they are highly effective for difficult expert positions that need filling. They help all those involved in the recruitment process to have a clear and common understanding of what skills, knowledge, experiences, and mindsets the organisation is looking for.

RECOMMENDATION 2.2: MAKE THE PROCESS ROBUST WITH THE RIGHT CHALLENGES

Armed with a success profile, the big question then becomes how do we test for the skills, knowledge, experiences, and mindsets we are looking for? Most organisations when it comes to hiring technical talent need to renovate (or introduce!) a testing regime. Skills need to be tested for, rather than talked about. Learning agility can be evaluated via psychometrics. Problem solving can be assessed by describing challenges and asking candidates to problem solve in real time. Many technical organisations are adopting tech-style hackathons for younger and emerging expert talent. Hiring for experts needs to go way beyond behavioural interviewing and checking the technical qualifications on a CV.

Your internal experts themselves should be very involved in designing the process, not just sitting on an interview panel.

LEVER 3: ONBOARDING

In our experience, onboarding is a workplace practice where most organisations are seriously underperforming, and this is particularly true when it comes to onboarding technical experts.

Organisations only get one chance to do it well. But few enterprises move beyond a 1-week orientation about processes, systems, and payroll (which is actually *induction* not *onboarding*). This is such a wasted opportunity.

Best practice onboarding is the responsibility of the manager, not HR. The HR and IT teams can build the world's best processes, systems and events that can move new hires through an orientation checklist in record time (induction) but accountability for onboarding sits with the manager. It is the responsibility of the manager to onboard employees into the ways of working, not HR. That includes the ways of working with the manager, the team, stakeholders, customers, and the wider organisation.

With a well-planned onboarding program, managers can set the tone, introduce expectations about culture and performance, and incorporate the expert into the team and organisation. While this is true for all employees, it's especially critical for experts who will soon be deeply immersed in highly technical issues and problems.

ONBOARDING MATTERS

A recent study by [Glassdoor](#) found that well-designed and executed onboarding can improve employee retention by 82% and productivity by 70%.

Only 12% of employees feel their company does a good job of [onboarding](#).

Onboarding starts before Day 1. [Good onboarding](#) results in far higher engagement, trust in the organisation, productivity, and lower turnover. It was through our interviews with heads of technical functions that we were able to identify the onboarding practices that reap the greatest benefits.

CYCLE 1: ACQUISITION

The faster you can get your new expert working a complex (but not impossible) problem, and they are made to feel welcome, the more likely they are going to believe they made the best decision joining your organisation.

While there are many initiatives organisations can take to create an outstanding onboarding experience for experts, we recommend starting with the initiative below.

RECOMMENDATION 3.1: ADOPT A BEST PRACTICE ONBOARDING PROCESS

Given that many organisations actually run inductions rather than onboarding, building a best practice onboarding process is a great place to start. Typically, best practice looks like:

Before Day 1:

- Do the pre-work necessary to ensure the expert can start working on a complex problem.
- Complete as much paperwork and logistics as possible with the new recruit.
- Have all necessary tools of trade ready for their arrival.

The first week:

- Systematically introduce them to important team members or stakeholders - they should not be expected to schedule in their own meetings.
- Schedule meetings with senior leaders for them to explain strategy, market context and the extent their domain of expertise can add value to their organisation.



CYCLE 2: CULTIVATION

OrgEx Lever	Optimal settings for Experts	Elevated outcomes
CULTIVATION	<ul style="list-style-type: none"> • Full capability model that champions and describes master expertise. • Bespoke development programs building enterprise skills for experts. • Feedback loops with stakeholders, mentors, peers and coaches. 	<ul style="list-style-type: none"> • More capable experts delivering greater value. • Experts motivated to learn more via clear development paths. • Improved performance engagement, and retention. • A dedicated expert-centric learning culture that attracts external experts.
	<ul style="list-style-type: none"> • The <i>technical ceiling</i> for experts is dismantled, and experts have multiple career path options. • Renewed focus on career progression being about “adding more value”. 	<ul style="list-style-type: none"> • Experts able to operate at a much higher level, adding strategic value. • Experts far more engaged because they are completing fulfilling and varied work. • Experts committing long term, and no longer short term flight risks.
	<ul style="list-style-type: none"> • Leaders of expert teams are trained specifically to lead experts. • Experts, appropriately supported, are promoted into leadership roles. 	<ul style="list-style-type: none"> • Expert teams are well led, leading to higher performance and the best experts staying. • Experts own their own development which is both technical and enterprise.

LEVER 4: DEVELOPMENT

To maintain expertise, professionals must be supported in their lifelong learning, with regular intense training requirements. For optimal value from your organisation's experts, training should be balanced between technical skills (which are typically provisioned for). Enterprise skills include capabilities such as business acumen, collaboration, stakeholder engagement, driving change, and relationship building skills.

Organisations need to understand how experts learn and why they want to learn (see Exhibit H).

Exhibit H: HOW EXPERTS LEARN

Real mastery is not learned "on-the-job". It doesn't come as a natural result of experience. It requires deliberate effort and focus to be in a continual state of stretch. What matters is effortful study, outside OF training, which entails tackling challenges that lie just beyond one's competence. Coaching and mentoring to support the constant pushing of boundaries are mandatory to achieving mastery. It is vital to build a regular routine of feedback loops between experts and key stakeholders.

It is also important for organisations to see this learning as an investment and as asset building rather than a cost. Indeed, those experts who are consistently invested in tend to stay with their organisations and add more value – training cost is typically a fraction of what a replacement cost might be.

Many experts achieve technical prowess, and then imagine that this is as expert as they can be.

This is a fallacy. In order to be the best an expert can be, they need to master both technical skills and enterprise skills.

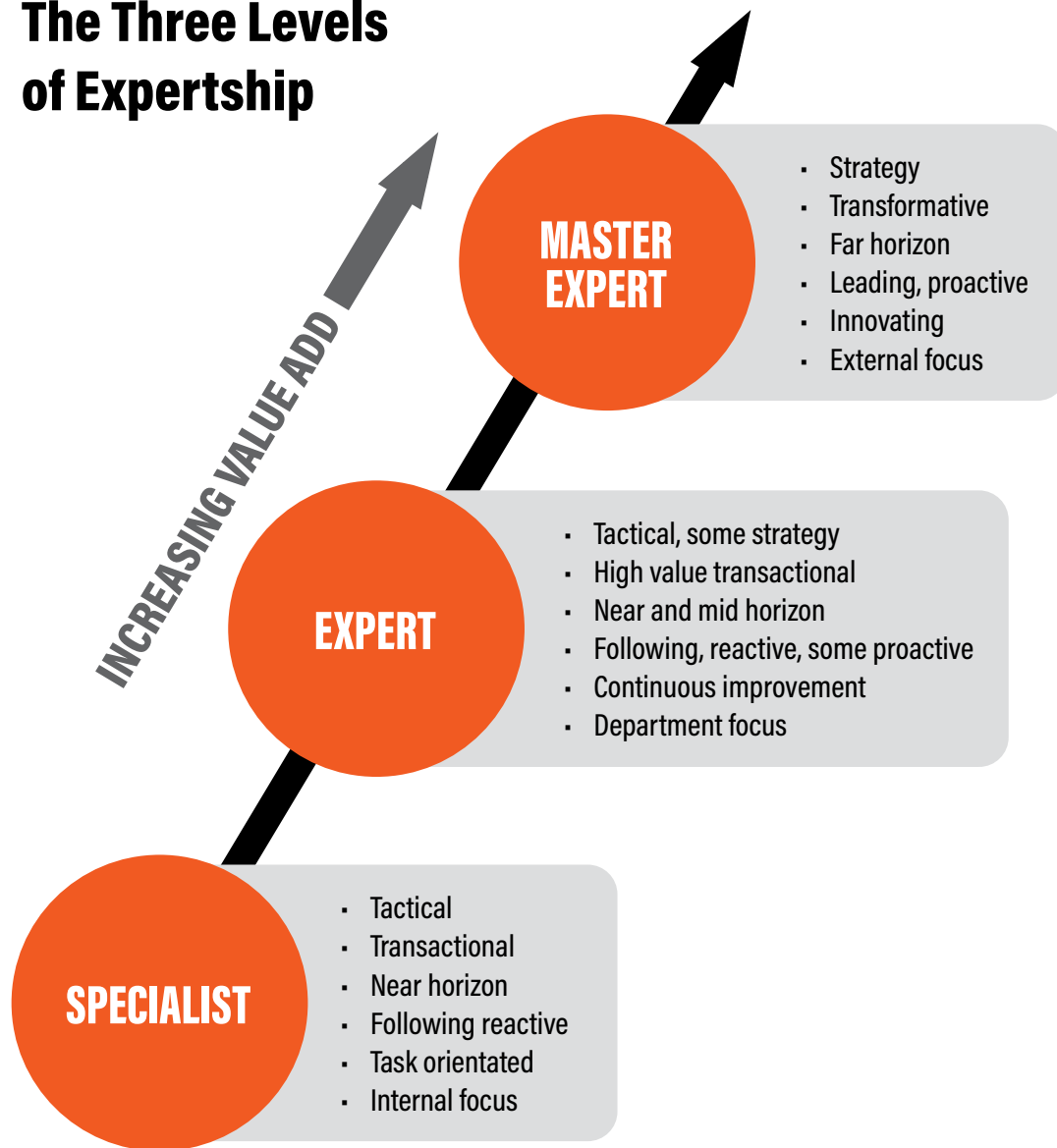
This is the ultimate goal for many experts: to achieve mastery. Masters have a much greater breadth of knowledge (beyond just technical knowledge), can activate it quickly without needing more research and apply their knowledge creatively to a wide range of unrelated situations.

It is not just the sheer amount of knowledge relative to other experts which creates mastery. Nor is it their ability to easily move and speak between the two worlds of experts and non-experts. Instead, an expert achieves mastery when they can bring those two worlds together to collaborate towards enhanced or new value for their organisations or community.

The Three Levels of Expertship help describe the different stages in an expert's capability development (see Exhibit I).

EXHIBIT I: THE THREE LEVELS OF EXPERTSHIP

The Three Levels of Expertship



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While there are many initiatives organisations can take to create meaningful and fulfilling development for experts, we recommend starting with the three initiatives below.

MASTERY MATTERS

“Only mastery of both technical and enterprise skills leads to becoming a master expert. They are held in the highest esteem by both their technical colleagues and all others in their organisation. They have a seat at the top table, are thought leaders and change catalysts. These are outstanding professionals who are reinventing our world and striving to make it a better place for everyone. Master experts deliver extraordinary and enduring value to everyone.” (Master Expert, p.12)

RECOMMENDATION 4.1: **ADOPT A CAPABILITY FRAMEWORK FOR EXPERTS**

Helping your technical experts understand their development roadmap, and the additional skills they need to acquire and practise in order to achieve mastery, is best achieved by adopting a capability model designed specifically for experts. The Expertship Model (see Exhibit J) is such an off-the-shelf but highly researched model which can be adopted quickly. You’ll find if you choose the right model, experts will understand it and embrace it quickly, and immediately aspire to reach the highest level of Expertship possible.

RECOMMENDATION 4.2: **BUILD ENTERPRISE SKILLS IN YOUR EXPERTS**

Typically, technical experts over-index on building their technical skills, and hugely under-index on building their enterprise skills (see the Relationship and Value Domains in the Expertship Model in Exhibit J).

Specific programs, designed for experts, that socialise the career power of mastering enterprise skills foster very significant benefits for your organisation. Note, don’t make the mistake of sending your best technical experts on leadership courses – they need specifically designed programs that enable them to reach mastery of their expertise. There are several suppliers of such programs, including our company, Expertunity.

RECOMMENDATION 4.3: **TEACH MASTER EXPERTS HOW TO MENTOR**

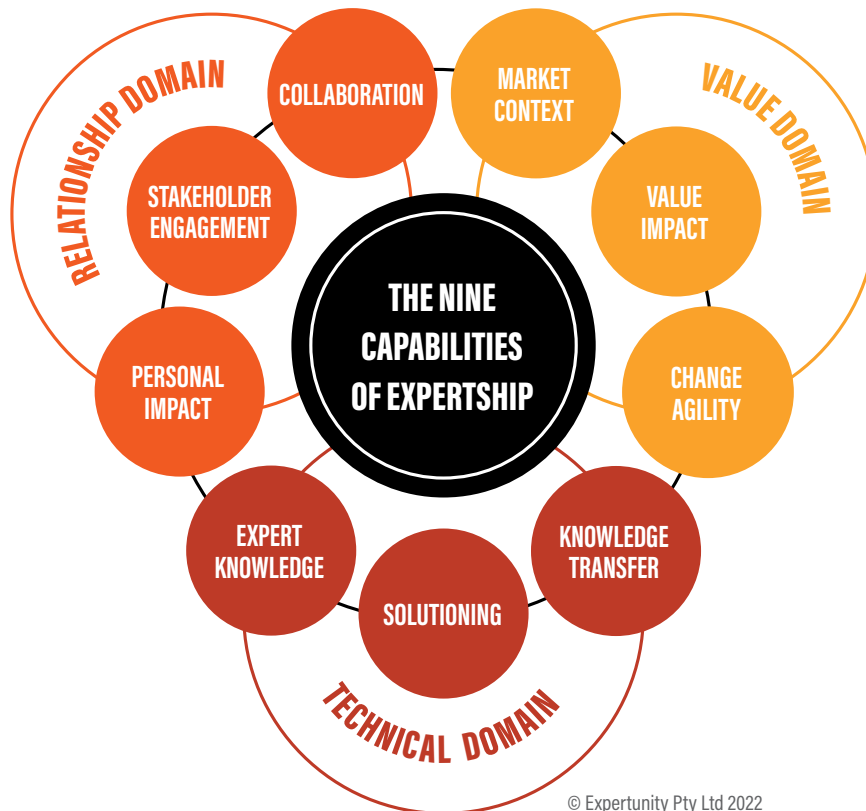
Masters develop other masters, much as leaders develop other leaders. Expertship is also a form of leadership which may include direct people management. Masters are not just considered leaders in their field because of the knowledge they carry but by the amount they share. As leaders in their own right, they can inspire change, nurture collaboration and foster comfort where there is uncertainty and ambiguity. Helping build mentoring

CYCLE 2: CULTIVATION

and coaching skills in your top experts mean they excel at sharing and inspiring your next generation of experts.

Later in this paper, we look at the attributes of mastery further and share our model for identifying high potential experts in organisations.

EXHIBIT J: THE EXPERTSHIP MODEL



LEVER 5: CAREER PATHING

The objective of an organisation when it comes to career pathing for experts is to dismantle the technical ceiling.

Typically, most organisations around the world tie pay, benefits, and seniority to the number of people managed. Career progression is typically also linked to the perceived ability of the employee to lead a bigger group of people. The impact is the creation of a technical ceiling which forces many experts to make a *devil's bargain* - whether they should move into a people leadership role or keep developing as an expert.

Choosing the Expert Path (See Exhibits K and L) can lead to an exciting and rewarding career but will often come with limited income progression compared to their people-leadership peers.

Some experts will decide that to progress in seniority and financially, they have to move into a people leadership path, whether they wish to, or whether this plays to their strengths, or not.

The technical ceiling creates two people risks that most organisations are very familiar with:

- **Transition Risk** – when those attempt the move into people leadership. When an expert, who has spent most of their career acquiring technical skills and experiences but not people leadership skills and experiences, attempts to leap across the divide the risk of failure to transition is very high. Often those that do fail leave the organisation. This happens not because the expert is incapable of leading people, but because the expert is hugely underprepared to make the transition.
- **Flight Risk** – where stuck under the technical ceiling, the expert gets stuck, bored, sidelined, and seeks new pastures. The technical ceiling is one of the major causes of high expert turnover.

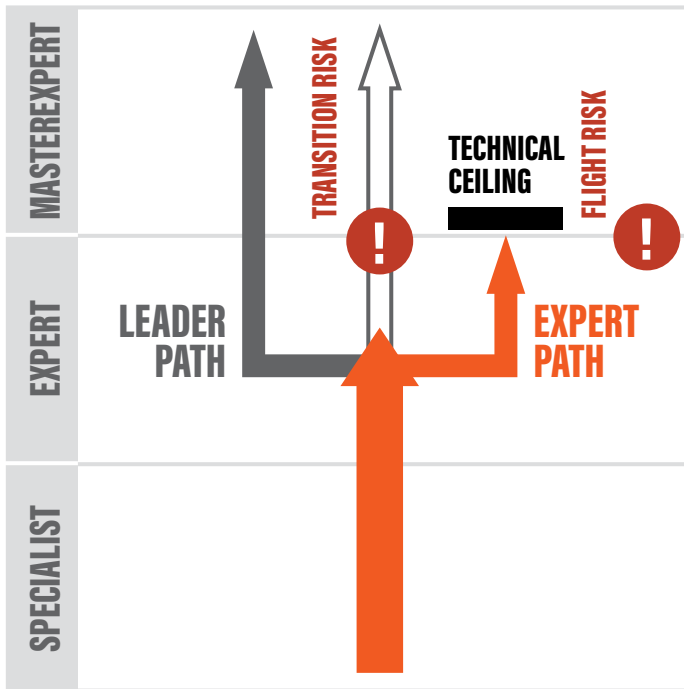
The optimal setting is for technical experts to be presented with three equally remunerative, progressive and value-creating career paths, as described in Exhibit L. This model allows experts to follow the expert path and progress (no technical ceiling), or a people leadership path, or a hybrid path of leading people in projects (often a good taster and experience for a broader move into people leadership, should this be desired).

Any organisation who wishes to attract and get the best from technical experts needs to identify and provide a variety of career plus pay and benefits options for their most valuable experts.

Any organisation that has an agenda of innovation, wishes to be agile and adaptive as market conditions change, needs to consider how to avoid these two careers risks for their technical experts.

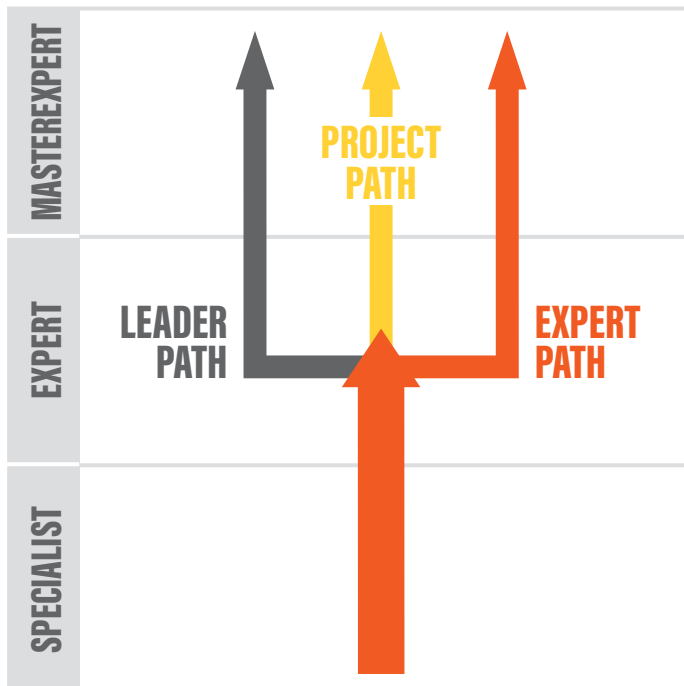
While there are many initiatives organisations can take to create meaningful and fulfilling career pathing for experts, we recommend starting with the two initiatives below.

EXHIBIT K: THE TECHNICAL CEILING



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EXHIBIT L: MULTIPLE CAREER PATHS FOR EXPERTS



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RECOMMENDATION 5.1: ADOPT A "VALUE" MINDSET

Strict adherence to the traditional hierarchical organisational structure will make expert career pathing almost impossible. The concept of span of control to determine career paths, seniority, and remuneration, which has lasted for 40 years, needs to be ditched. It should be replaced by a concept that is now much easier to articulate and champion: the concept of value creation. Those who can add the most value to the organisation will acquire the benefits of seniority and "promotion". This could be managing the activities of large numbers of people, of course; but it could also be leading a key project, developing new innovative business models and services, or being the knowledge guru in a mission-critical professional expertise.

These latter descriptions of value-add suit experts: many experts, often the master experts, are more aligned to leading their profession than leading people directly. Career progression for them is measured by tackling increasingly difficult and complex problems and opportunities that require their knowledge to address. The scope and impact of their output can be as significant, if not greater, than a generalist people leader.

Some organisations are on the path to deploying value add as a concept, by adopting new structures and processes:

- They deploy an agile or matrix structure, where experts are placed into guilds or chapters, and are led by a master expert who is responsible for their mentoring and development. These guilds may also have their own hierarchy, with masters reporting into even more senior masters, creating a career path.
- Many experts have a traditional line manager, but also have technical leads (perhaps regional or global – these are often the most senior experts in the organisation).
- Assigning experts to sales teams, pitching technical solutions to clients as opposed to assigning them to projects after a sale is closed.

RECOMMENDATION 5.2: PUT PROJECTS IN THEIR PROPER PLACE

Make leading projects and similar initiatives and activities etc work that is properly rewarded with kudos, bonuses, etc, and seniority.

Some experts may want to progress by leading projects of increasing scope, complexity, and impact. Project team members may report to a line manager but operate under the supervision of a lead expert while working on the project. Most larger organisations will have some level of pathway from project coordinator to senior programme director that experts could align to. It's important there is a system to capture the extra value experts are creating by being involved, and perhaps leading, these projects.

IMPORTANT NOTE: Career pathing for experts cannot be addressed in isolation of salary bands. See the Lever 7, Remuneration.

LEVER 6: SUPPORTIVE LEADERSHIP

Many organisations believe that a people leader of technical teams doesn't need to have a strong technical understanding of the skills and knowledge of the experts they manage, because strong people management will trump all.

This is not the view or experience of expert teams themselves. For high-performing technical teams, managers must earn the right to lead – as exemplified in the research piece [If Your Boss Could Do Your Job...](#)

The research suggests that leading a team of experts, presents unique challenges that require unique tactics. Managers of expert teams will often be leading people who have significantly more experience or expertise, which can be uncomfortable for most people. In these situations, managers need to be clear what their own strengths are and how those strengths can be leveraged to support the expert team.

If a manager is unable to do any of the first four items in the list in the box below, they will need to develop themselves accordingly - be it coaching, mentoring, or obtaining access to technical research.

NON-TECHNICAL LEADERS BUILDING RESPECT

This special kind of manager can earn technical respect by:

- Having a working level knowledge of their experts' technical work.
- Making technical contributions to the field/profession the experts work in.
- Keeping up with relevant emerging trends, technologies, and tools in the experts' domains.
- Being active in relevant technical or professional organisations.
- **And** doing all the other stuff taught in their people leadership.

Organisations and their leaders of expert teams, need to accept leading expert teams is different, and in some respects, more difficult than leading teams of generalists.

While there are many initiatives organisations can take to create supportive leadership environments for experts, we recommend starting with the two initiatives below.

RECOMMENDATION 6.1: BUILD LEADERS' CAPABILITY TO LEAD EXPERT TEAMS

Once philosophically the organisation accepts that leading expert teams is different, the task becomes to build the capability of your leaders of expert teams to do a great job. This means exploring all the research and data on the unique challenges and arming your leaders with the skills and narratives to inspire greater performance from their technical experts.

In our experience, while initially cynical about the need to deploy different narratives, leaders hugely value this specific leadership development once they have received it. Hint: making sure they are familiar with the expert capability model you have adopted is a very important part of the curriculum.

Expertunity has designed a specific development program for [leaders of expert teams](#).

RECOMMENDATION 6.2: PROMOTE TECHNICAL EXPERTS TO LEADERS WHEN THEY ARE READY

Many experts get promoted into team lead roles not because it is a position they aspire to, but because they are the only option. Often this is because they are the most 'senior' expert, with perhaps the most experience, knowledge, and skills. Many organisations do this without these senior experts being ready to lead. Such unlooked for and unwanted promotions can lead to poor team outcomes and sometimes the loss of the team lead, who feels their only option to save face is to find an expert position elsewhere. Organisations can mitigate this risk by building the enterprise skills of their individual contributors more broadly. Key coaching and influencing skills, together with relationship building skills, enable individual contributors to more easily and successfully step up to leadership roles if they have to. Promoted experts should be supported with leadership programs or executive coaching as soon after promotion as possible as well.



CYCLE 3: RETENTION

OrgEx Lever	Optimal settings for Experts	Elevated outcomes for Experts
RETENTION	Remuneration <ul style="list-style-type: none"> • Remuneration strategies that pay for value-add, not just the number of people managed. • Acceptance that there will exist a guru class of employees that need to be remunerated outside normal structures. 	<ul style="list-style-type: none"> • Your best experts – and future gurus – will stay because it is worth doing so. • More robust talent pipelines, bench strength is increased because of strong future prospects. • Highly attractive career destination – this organisation has gurus!
	Talent Spotting <ul style="list-style-type: none"> • Amend the 9-box grid. • Expand definition of potential to be specifically relevant to experts. • Talent systems to balance leadership development with expert development. 	<ul style="list-style-type: none"> • Improved retention of top expert talent. • Increased value creation from these experts, due to expert development. • More robust and diverse talent pipelines.
	Expert Brand <ul style="list-style-type: none"> • Elevate your top experts to effective brand ambassadors. • Make building experts into gurus deliberate, planned, and supported. • Create external opportunities for experts nearing retirement. 	<ul style="list-style-type: none"> • Improved organisational expert employment brand, which leads to increased attraction from external experts. • More top experts feeling valued and respected, and therefore positively retained. • Improved retention of late career experts.

LEVER 7: REMUNERATION

Remuneration is seldom a primary motivator for experts. But it is a hygiene factor. Experts expect to be paid properly for the value they create.

What happens when, with newly forged career paths that enable experts to add significantly more strategic value, they discover they are at the top of the expert pay scale, and increments are the only thing they can expect from here on in regardless of the extra value they are contributing?

GURU CLASS

Experts who because of their seniority, knowledge, experience, and innovative contribution get paid as a member of the organisation's guru class, rather than being restrained by typical technical pay scales.

Performance bonuses might be an option. Performance bonuses can sometimes motivate completion of routine tasks or deadlines. But as shown by researchers like Daniel Pink in "[Drive](#)", once you make rewards an expectation, like an annual performance bonus scheme, it often ceases to have any ongoing ROI from an organisational perspective. Pink also proved financial motivators can negatively impact intrinsic motivators, which have been shown to lead to greater levels of performance. We also now know they negatively impact innovation and creativity – two capabilities critical for your experts to deal with deeply complex problems and opportunities.

Honoraria might be an option, particularly for responsibilities that are short or medium term, such as leading a major project. Honoraria are accepted as being turned on or off, depending on workload and responsibility.

But there is an essential problem most hierarchically organised organisations have: they refuse to pay a team member (who might be a 20-year veteran expert with stellar super-powers – more than the team leader.

For most organisations, expert careers cannot be significantly improved without resolving this remuneration conundrum. But it is difficult, because it requires a huge change in mindset, one that, by the way, fast growing global technology companies got over a long time ago.

From our research of different practices around the world, there are several strategies organisations can successfully deploy to address the remuneration ceiling experts face:

- The individual contributor - create alternative career paths with the same rigour as leadership pipelines, with levels of seniority on par with people leadership counterparts. Alternative career paths with increasing levels of seniority could include technical streams and levels of project responsibility.
- Pay by value - redefine the criteria for pay bands in remuneration strategies so there is less emphasis on the number of people managed and the size of operational budgets, and more about scope of impact, value creation or potential to innovate or disrupt.
- Compete against the market - many organisations remunerate the starting pay rate for all their roles as a percentile of the median rate in the labour market. This can be problematic for skills that are in high demand. Percentiles should fluctuate based on market demand for top skills.

While there are many initiatives organisations can take to create an equitable and motivating remuneration regime that is inclusive of experts, we recommend starting with the two initiatives below.

RECOMMENDATION 7.1: **START THE CONVERSATION WITH INNOVATION AND THE CONCEPT OF GURU-CLASS**

If your organisation truly wants to be innovative, create new value for customers or the community, then it needs to build a team capable of delivering such value. Looking at the most innovative organisations around the world, how do they do it? They do so by hiring absolutely the best experts, *no matter what the cost*. It is very typical that top ranked technical experts in these organisations – who often have no employees reporting to them at all – are paid as much as senior leaders, and possibly a great deal more than the person they nominally report to. They are that organisation's *guru class* and are paid accordingly. This is a conversation that OD professionals and Rem and Ben specialists needs to start having with senior leaders, because without radically rethinking pay structures, your organisation will never be able to attract top experts.

RECOMMENDATION 7.2: **PROMOTE SMALL PAY CHANGES FIRST**

Radically rethinking pay structures is a huge job and takes months if not years, and lots of capacity which many People and Culture teams simply don't have. So, we recommend starting with small steps, and changing pay scales by using "exemptions" from the normal pay scales. Take Guru Billy, for example, who has longevity, is mission critical, has skills, knowledge and experiences that are irreplaceable. Using an agreed criteria set, Billy qualifies for exemption and a higher than usual pay for that role. It is the same principle that sports teams use – there is a salary cap, but one or two star players are allowed to be paid beyond that salary cap.

LEVER 8: TALENT SPOTTING

Many experienced managers believe they can spot talent in new recruits. They often confuse talent with early signs of skill and self-confidence as opposed to real, sustainable talent. Therefore, Type As and Alphas - two groups in which experts can also belong - will be promoted earlier, get the wins, and be supported to further successes. But this approach often misses highly capable talent that quietly gets on with not so visible work - very often experts.

To identify junior future expert talent, one of the factors organisations should focus on is finding people who are passionate about their field. It is this passion and motivation that is required to go through the development requirements of reaching true mastery.

One of the most common tools organisations use to identify high potential talent is the 9-box grid. This grid is career death for experts, or at least in its most traditional use. Many organisations narrowly define potential as the future ability to lead larger teams, or the ability to move up two roles in 'x' years. When combined with the traditional approach to remuneration, experts lose out in the career stakes.

THE NEW DEFINITION OF TALENT POTENTIAL

When assessing potential, organisations need to first ask “potential for what?”. The answer:

The ability to consistently generate levels of value and output that is exceptional relative to their peers and could influence the success of the organisation.

Using a new definition of potential (see box out), suddenly many experts who would be confined to the “technical star” box on the 9-box grid, become instant members of the green pool.

From Expertunity’s work with experts and their organisations, we have developed an identification model (see Exhibit M) for high potential experts - and the methods to develop them to full potential as expert leaders.

We have categorised three sets of criteria that helps organisations identify technical talent:

- Personal markers – these are the personal attributes that indicate the expert is determined to reach the top of their field as quickly as possible. They include passion for their domain, vision for change and contribution, and great learning agility. The last three bullets in this category are often missing in early-stage and medium-stage experts, and need to be trained in.

EXHIBIT M: THE EXPERT POTENTIAL MODEL

PERSONAL MARKERS

- Passionate desire to advance their technical domain's impact on the organisation/world (obsessive passion about the potential of their domain)
- Belief they can personally add more value
- Strong desire to learn and be the best technical expert they can be
- Overly attracted to and distracted by really complex and difficult problems/challenges
- Commitment to the organisation (connection to purpose, staying power)

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ORGANISATIONAL MARKERS

- Mission critical role
- Possible single point of failure
- Flight risk impact is very high, replacement very difficult
- Domain becoming more important (e.g., data science)
- Role has the potential to add breakthrough competitive advantage

ERRONEOUS MARKERS

- Current lack of emotional intelligence
- Abrasive with stakeholders
- Currently operating in technical bubble
- Apparently lacking ambition

- **Organisational Markers** – these describe the organisational context of the domain knowledge the experts possess – how important are they to the long-term success of the enterprise? Particularly helpful might be an assessment of the ability for the expert (or expert team) to add breakthrough competitive or community value.
- **Erroneous Markers** – these are the markers which very often, when identified, P&C counts *against* experts, when they should be indicators of constrained ability. Why do technical experts get abrasive with other stakeholders? Typically, our research shows it is because they believe they can add more value but are not being given the opportunity to do so. Why do experts sometimes appear to lack ambition? Our research suggests that this is a lack of ambition to be a *people leader*, but there is typically no lack of ambition about being the best expert they can be.

Using this new set of criteria to apply to experts will revolutionise the expert talent pipeline.

RECOMMENDATION 8.1: SEE POTENTIAL MORE BROADLY - DUMP THE 9-BOX GRID

Of all the recommendations in this whitepaper, this is perhaps the one that will make the most difference. The era when we could focus only on leadership development is behind us. The Age of the Expert has arrived, and our talent systems must reflect this new reality. The conversation about refreshing an organisation's definition of "potential" is the first agenda item. That means either dumping, or significantly amending the nine-box grid.

RECOMMENDATION 8.2: DESIGN BESPOKE DEVELOPMENT PROGRAMS FOR EXPERTS

Development must be specifically designed for experts. High potential experts do not fit into the same programs and training designed to develop future people-leaders. Much of the content will not be relevant, such as motivating employees, having performance discussions, or managing a cost centre. Expert-focussed developmental curricula will leverage their unique strengths, while also addressing their specific skill gaps such as stakeholder engagement, commercial acumen, and strategic thinking – but within the context of leveraging expertise. Only then will you have a pipeline of expert talent with the same depth as their leadership cohort.

LEVER 9: EXPERTS AND BRAND

With experts recognised as leaders in their fields, they can be powerful, authoritative ambassadors for both your market and employment brand – “Nine out ten experts agree...” has become a marketing cliché for a reason. It works.

Supporting the organisation’s top experts with the capability, capacity, and funding to present at external conferences, teach at universities, author books, or produce their own podcasts, can have a significant positive impact on public perceptions of your organisation. While the research is limited, some studies, [like this one in the United States](#), show that the endorsements by experts have a greater impact on consumer decisions to buy than celebrity endorsements for products like high-technology.

Well prepared experts are equally important to your attraction and recruitment strategies because technical professionals are attracted to working with known masters. Opportunities for external exposure are also a key part of retention strategies. Passing on knowledge and leaving a wider legacy is highly attractive to masters, particularly those approaching retirement.

Your experts likely represent a niche of your consumer market. Experts, with their niche areas of focus, can identify issues or opportunities that are not on the radar of market research. Including experts in your product or service design and brand development, ensures all options are researched provides greater credibility.

Experts may need some support in finding opportunities for greater public or professional exposure. During our work with nearly 2000 experts in the last few years, we’ve learned that this expert brand work can’t be left to chance, or the experts themselves, because:

- Even if your experts are doing breakthrough work inside your organisation, they are probably unaware of how breakthrough it is, because they spend little time externally.
- Even when your experts realise the work they are doing is cutting edge, since many are naturally introverted, they are either passive or actively resistant to speaking at a conference, writing LinkedIn blogs, or being a regular contributor on technical forums.
- Even if they overcome the two barriers above, their expertise in sharing their expertise is probably under-developed.

The future guru class of experts in your organisation need help in all of these areas. Most organisations’ public relations team can offer serious assistance, and of course, the leaders of experts need to be encouraging and supportive of such initiatives – many of which might take time away from their day-to-day tasks. But the payoffs are worth it.

RECOMMENDATION 9.1: **HELP EXPERTS BE GURU-READY**

Allocate a qualified internal resource to mentor and coach leading experts in becoming a guru. This might be a colleague from marketing or communications, or an expert guru who has already made the transition from passive introverted genius to global sharer. However, you may need to develop your internal mentors with some mentorship skills and techniques. The quality of the mentor's skill will have a significant impact on any learning outcomes for the expert.

RECOMMENDATION 9.2: **CONNECT TALENT ACQUISITION TO THE GURU CLASS**

Your talent acquisition team is likely thinking about how to get the organisation's employer brand "out there" to attract the right kind of top talent. To attract the best expert talent, you can make great use of your own gurus by giving them the skills and the capacity to present at the professional forums and networks that the talent you need will likely be attending. This will require the organisation to develop lists of the relevant professional associations, conferences, and forums – many of which will change each year. You will also need to learn how these organisations select their speakers well in advance. Many professional events will have their marketing to promote their speakers several months in advance.

Once you start increasing the number of potential candidates who may be interested in working for your company, you will need to convince them the hype is real. Gurus can be lined up for casual chats with high quality candidates. Presentations about "how we work here" from gurus can be part of the recruitment campaign. Making sure gurus repeat and articulate key Expert Employee Value Proposition talking points during presentations and external conversations all adds to building a hugely valuable expert talent pipeline.



CYCLE 4: IMPACT

OrgEx Lever		Optimal settings for Experts	Elevated outcomes
IMPACT	Expert Leaders	<ul style="list-style-type: none"> Expand, modernise definition of leadership. Improve skills in influencing, change and stakeholder management. 	<ul style="list-style-type: none"> Improved internal and external collaboration. Improved capacity for change. Organisational future-proofing.
	Strategic Alignment	<ul style="list-style-type: none"> Introduce experts as strategic partners. Develop experts' strategic thinking. 	<ul style="list-style-type: none"> Higher quality strategic planning. Faster response times to external threats and opportunities.
	Expert Culture	<ul style="list-style-type: none"> Don't ask them for superficial solutions to complex problems. Identify and spotlight expertise. 	<ul style="list-style-type: none"> Improved performance, engagement, and retention. Improved utilisation of internal expertise. Opens organisation as employer of choice.

LEVER 10: EXPERT LEADERS

Expertise is a super-power. Experts can, and should, play an important leadership role in organisations.

This small “I” leadership role does not necessarily require them to manage people directly, but experts can still be leaders without a title or higher level in the hierarchy.

THE TWO TYPES OF ‘LEADERSHIP’

Capital L leadership

Leadership - Leading people, teams, and having ultimate decision-making ability in the organisation. Typically, people leadership.

Small L Leadership

leadership – leading technical initiatives and innovation through expertise, knowledge, and experiences. Guru class. No direct reporting lines required because people listen to these gurus.

In fact, as experts become more important in society, as organisations become flatter and with new hybrid organisational structures, the leadership opportunities for experts are growing quickly. Organisations who keep their experts in boxes, intentionally or not, will struggle to retain their top expert talent as those talented experts seek to spread their leadership wings in more evolved and supportive environments.

Crucially, organisational design needs to recognise the various types of power that is exercised in most organisations (see Exhibit N).

EXHIBIT N: THE SEVEN FORMS OF POWER

	Power	Description
1	Coercive Power	The use of threats or potential threats.
2	Reward Power	The use of perceived rewards such as financial, recognition, training, or perks.
3	Legitimate Power	Power bestowed on someone because of their role and position.
4	Expert Power	Having a level of knowledge or skill that other people need and want.
5	Referent Power	Having charismatic power or the power of personality.
6	Connection Power	Having access to those with influence or power.
7	Informational Power	Having access to information or insights that others want.

Unlike power that depends on a position, anyone can possess expertise. In this way, Expert Power may be seen as more legitimate than Legitimate Power itself, particularly among those who view Expert Power as the result of hard work and deep thinking.

If self-managed correctly, Expert Power earns the trust and respect of others. Experts may find it easier to motivate others to perform to their full potential.

Remember though, the organisation has responsibilities here:

RECOMMENDATION 10.1: HELP UNLEASH DIPLOMATIC EXPERT POWER

Take responsibility for making sure your organisation's experts know how to exercise their Expert Power correctly, noting that:

- Experts still need training in enterprise skills to use their expert power to its full effect.
- Those skills and their expert knowledge need ongoing development to sustain Expert Power.
- Expertise must be consistently applied to the needs and the situation of those around the expert.
- Like all power, Expert Power can be abused or implemented poorly - organisations must remove policies and behaviours which reinforce monopolistic control of leadership responsibility by those in higher positions in the hierarchy.

LEVER 11: STRATEGIC ALIGNMENT

The days of strategy being the sole remit of a group of men and women locked away in a boardroom are quickly disappearing. Yet, many organisations still conduct their strategic plans as if executives and their strategy team are the only ones with any insight into emerging threats and opportunities. Experts in these organisations, if they are involved in strategy at all, are producers of reports and recommendations to be discussed and debated by decision makers behind closed doors without the expert's further participation/inclusion.

In high-performing and high growth companies, the experts have likely moved from service providers to strategic partners, creating strategy in real time. The global competitive environment moves so fast and is so complex, many organisations have rebuilt their strategic planning processes from the ground up, literally. Strategy is becoming much more about getting real-time insights from the front line - not just data - and then responding quickly with actions that are a combination of firm bets and experiments.

In our experience, one of the most common requests by experts is to receive coaching and mentoring in strategic thinking and how to get more involved in their organisation's strategic process. Developing these skills and techniques is relatively straight forward and does not require an MBA. However, navigating the internal political landscape, getting heard by those locked away in the boardroom, and implementing ideas to address external threats and opportunities is significantly more difficult.

THE STRATEGY TEST

Who is involved in your organisation's strategy discussions? Is it a super-set of the most senior leaders in your business, supported by strategy specialists? Or are front-line operators and subject matter experts very involved?

And if those experts are involved, has the work been done to make them 'strategy ready', so they can contribute strongly and at the right level, not derailing big picture discussions by wallowing in the detail?

RECOMMENDATION 11.1: **GET YOUR EXPERTS 'STRATEGY READY'**

To move a service provider role to a strategic partner, we recommend experts develop a routine of monitoring emerging threats and opportunities to their organisation within the context of their domain of expertise. Organisations should then give their experts the capacity and forums to discuss these impacts and share hypotheses on how the organisation should respond. Through open discussion, debate, and support from managers, experts can start to develop their strategic thinking skills while also potentially identifying issues the organisation may not have been aware of.

RECOMMENDATION 11.2: **GET YOUR EXPERTS OUT MORE**

Too many experts we work with are intensely internally focused. They do not get out and about enough, within their organisation. And they do not prioritise spending time exploring the world outside their organisation. It is impossible to add strategic value – whether you are a people leader or a top technical expert – unless your organisation's strategy is thought through taking the external environment into account.

LEVER 12: **EXPERT CULTURE**

We have established that experts have their own set of motivational drivers, priorities, and frustrations. Organisations need to use this knowledge effectively to keep experts engaged and committed.

A combination of all the settings we have described in other levers lead to an expert culture which is conducive to experts doing their best work and being thoroughly engaged and fulfilled in doing so.

The way in which experts are treated in general by non-experts – and in particular by senior leaders – is a key aspect of this culture.

“Senior leaders have a big role to play in building a pro-expert culture.”

High-performing organisations that utilise their experts expertly ensure:

- Senior leaders pay plenty of attention and spend time with the top experts in the organisation.
- Senior leaders involve top experts in key forums and leadership gatherings.
- Top talented experts are constantly challenged with complex problems and opportunities which require their specific expertise.
- Experts are seen as a competitive or community advantage, not a cost.
- Different cohorts of experts constantly work together on solving whole-of-organisation problems – knowledge silos are avoided.
- Experts are involved with helping shape as well as execute strategy.
- Experts can progress to the top levels of the organisation based on their level of expertise, not just their span of control over teams of people.
- There is a constant investment in learning for experts as well as leaders – these are in balance.

This might be characterised as being a very pro-expert culture but it's important to note that other groups do not have to be disadvantaged. A pro-expert culture is actually one that is not only passionate about diversity and inclusion, but also seeks to full leverage the potential that diversity can bring.

These high-performing organisations avoid the problems of having a non-diverse culture that is experienced by experts as frustrating, where experts are:

- Relegated to fire fighting.
- Having their recommendations to decisions makers ignored or misunderstood.
- Expert teams are extremely siloed.
- Expert work is barely visible, and thus undervalued.
- Expertise is seen as a service and not a strategic imperative or competitive advantage.

Changing this negative lens and creating a pro-expert culture can enable organisations to fully leverage diversity and the potential of their experts.

RECOMMENDATION 12.1:

It is very easy for experts to become siloed within their organisations because of the way expertise is often utilised as an internal service as opposed to a real working partnership. Furthermore, experts often have a strong preference for staying within their “tribe”, becoming isolated and developing an ever increasingly narrow focus. To address this, increase expert career mobility by assigning them to projects across the organisation, including projects which may not be directly related to their sphere of expertise. If at all possible, try to maximise opportunities where experts are working directly with teams that interact with your customers or clients. Or with sales teams where decisions need to be made about price vs quality on a regular basis.

RECOMMENDATION 12.2:

Expertise has been and will continue to be increasingly important to the development of corporate strategy, yet many organisations do not develop strategic thinking and commercial acumen skills in their experts. At best, this relegates internal experts to report providers or advice givers to the executive team, who may not truly understand the advice given. At worst, your organisation contributes to the billions of dollars spent every year on strategic consultants around the world.

Develop the strategic and commercial skills of your experts by giving them the tools to identify external threats and opportunities related to their sphere of expertise and how the organisation may need to respond. Create forums for them to share and debate their hypotheses with peers and strategic leaders. If you can, assign a mentor from your strategy team, if one exists.

THE FUTURE OF EXPERTS

In a world of increasing complexity and uncertainty, no one person – expert or generalist – will be able to fully grasp the volume of data, signals and noise that constitute a complex problem or opportunity. Nor will input from a single source be able to build a real solution, as opposed to a band aid.

Ultimately, the real master skill of an organisation will be collaboration – leveraging the wisdom of your crowds towards the solutions you need. Bringing subject matter experts together, from multiple and diverse domains, is the first step to identifying the innovations and disruptions that will allow your organisation and community to thrive. Those enterprises which nurture the full potential of their experts and facilitate collaboration between diverse ways of thinking will define the success of organisations, now and into the future.

Summary

Our Organisational Expertship Model helps enterprises see which settings they need to optimise for their subject matter experts, to secure the best candidates money can buy, and how to get the best value from them.

Experts have never been more important. The sooner you act, the sooner you'll be confidently able to secure and fully leverage the expertise critical to your organisation's future.

From this Whitepaper you'll have the arguments and proofs to design a cogent, undeniable business case to turn around your brain drain, to be an employer of choice.

Organisational Expertship: Where to Start?

If your organisation is typical, then the People and Culture and Organisational Development function has many projects on the go and not enough people to deliver them. And starting an OrgEx initiative is new, unknown, and as a consequence a challenging project to undertake.

However, if technical subject matter experts are mission critical to your organisation, and the organisation is having difficulty hanging on to your star experts, the P&C and OD team must do something. Where to start?

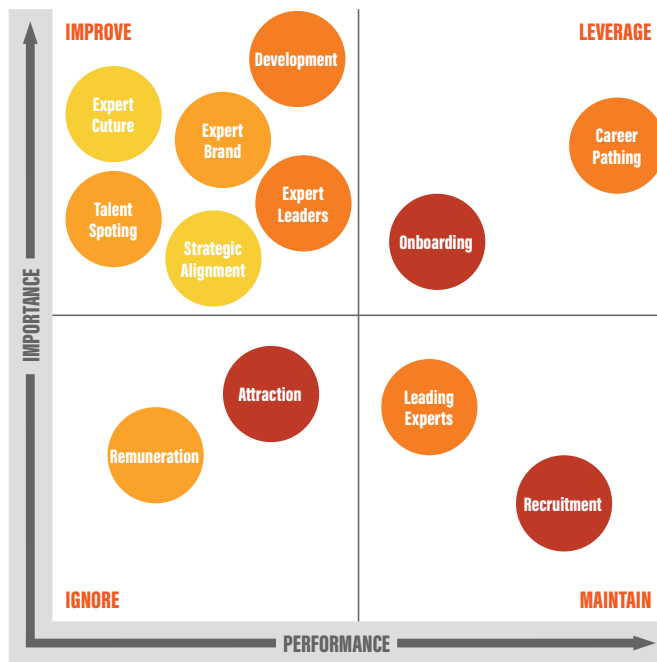
Our suggestion is to undertake an assessment, such as Expertunity's OrgEx Index assessment which enables organisations to quickly assess in which areas a small amount of effort would reap positive results, significantly improving your organisation's expert employee value proposition (E-EVP).

As you can see from the sample below, the assessment identifies areas of work where the level of importance is HIGH for experts, but performance is LOW. These are the areas to start with your OrgEx initiatives.

You can build your own assessment or leverage ours. We offer a free one hour consult to any organisations wishing to explore the opportunity to improve their E-EVP.

Note: An organisation undertaking an assessment asking the organisations technical experts what is important to them immediately improves the E-EVP, because this consultation is seen by the expert population as a significant positive. Having done so however, the feedback then must be acted upon.

Expertunity's OrgEx Index assessment



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This simple Expertunity assessment table helps you identify the most important obstacles blocking your experts and strengths that can be leveraged.

The assessment asks a representative sample of your internal subject matter experts to rank some of your key workforce practices and policies in terms of how important each policy is to them and to rank how well they think each policy is performing for them. The sample table is the graph that summarises the feedback from the experts.

In this sample, the organisation could improve the attraction, retention and performance of their experts if they **IMPROVE** the workplace policies in the top left corner – those policies which experts have ranked as being both an obstacle and highly important to them.

The organisation has two areas that are important to their experts and where they are performing well, so the organisation should seek to **LEVERAGE** these strengths further.

The organisation's Remuneration and Attraction practices are performing poorly but the experts are also saying they are not as important as others, so the organisation could choose to **IGNORE** these policies for the time being.

Finally, Leading Experts and Recruitment are performing well according to their internal experts, but they are also perceived as not important. The organisation could choose to **MAINTAIN** the performance of these practices but should also consider whether they are perceived to be unimportant because other policies are clearly perceived as obstacles by their experts.

ABOUT

About the author

Darin Fox is the Chief Research Officer and Principal Consultant at Expertunity and HFL Leadership. He also works as a senior coach in both expertship and leadership and is a master facilitator of both. Darin joined Expertunity in January 2020 as a consultant, coach, and facilitator while also leading research initiatives to better understand the obstacles and drivers of developing expertise in organisations.

About Expertunity

Expertunity is the global expert on developing technical specialists to achieve peak performance. Whether it's economists, engineers, prefab designers, policy writers, researchers, or similar roles, we probably have developed someone just like them. Our vision is to help one million experts around the world to improve their lives and reach their full potential.

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