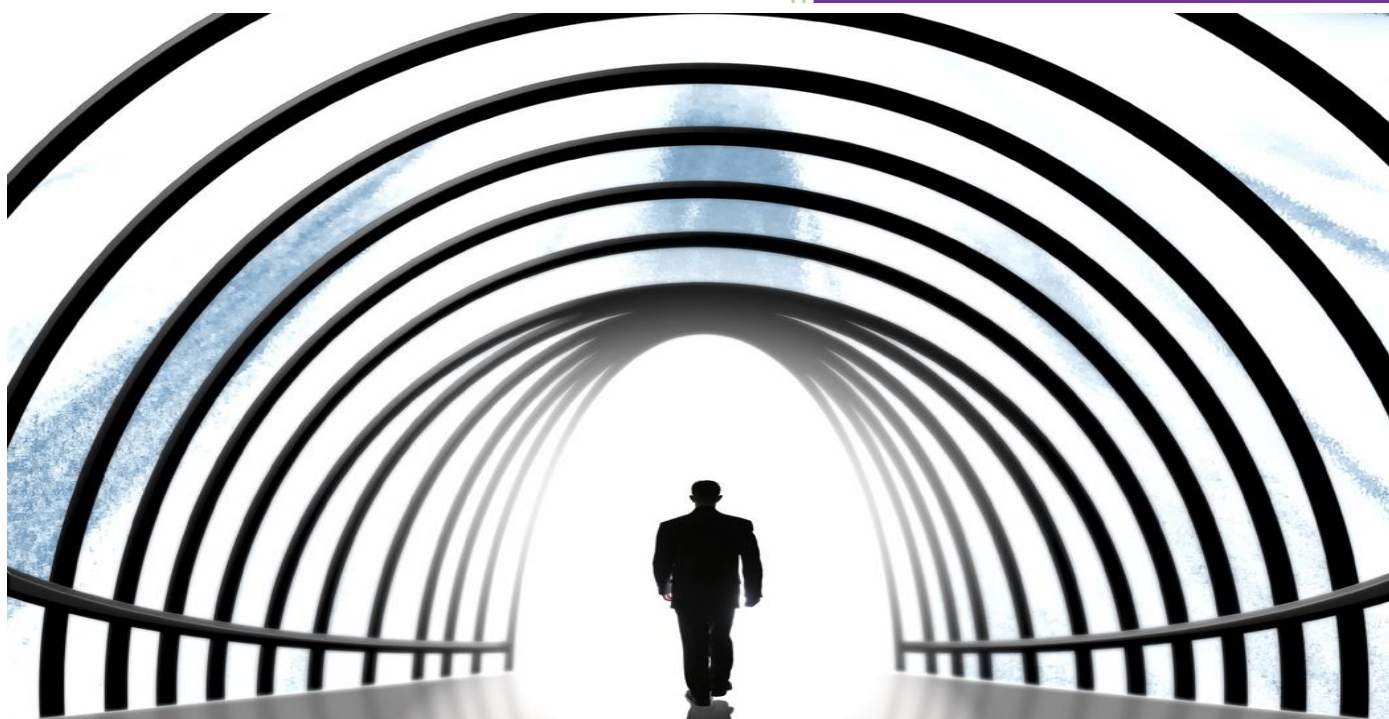




From Expert to Leader

The Individual Experience



**What does it take
to transform
talented experts
into successful
business leaders?**

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Executive Summary

Xpert2Leader is Xancam's latest, leading-edge talent solution - it transforms talented experts and senior specialists into successful business leaders.

Xpert2leader is a development solution that enables the critical transition from a senior specialist role (for instance, underwriter, scientist, surveyor, lawyer) to a general business leadership position (such as General Manager or Business Unit Leader). The design of Xpert2leader has drawn on leading-edge thinking from both psychology and business research, to design a programme that effectively *accelerates* the transition from 'senior specialist' to 'business leader' and which enables suitably motivated and talented people to reach peak performance in the quickest time possible.

Xpert2leader has successfully been applied across a range of organisations and industry sectors. Xancam client Allianz makes the Xpert2Leader approach mandatory for all senior specialists progressing to general leadership.

This report summarises research by Xancam on the experiences of senior business leaders who have made a successful transition to general management, having begun their careers as technical or functional specialists.

The research was qualitative and involved structured interviews with 15 general managers who originally held specialist technical roles. Participants were asked 7 questions covering: their motivation to make this career move; what considerations inhibited them or held them back; the challenges and difficulties they encountered; what they had to acquire to be successful; what they had to let go of; what additional support would have helped and how they feel they are different from specialists who have not made a successful transition to general management.

Content analysis of the results indicated some common themes amongst the interviewees. Clear differences in the factors that define and motivate generalists differently from specialists emerged, as did insights into the development and support that those interested in making this career move find beneficial.

Introduction

This paper represents the outcome of research conducted by Xancam on the experiences of people who have progressed from an 'expert' role to a broader 'business leadership' role.

We spoke to 15 senior managers who have successfully made this transition. The industry sectors embraced construction, financial services, technology and science. Those we spoke to currently occupy a range of roles, including: CEOs, C-suite directors and Business Unit Leaders with significant P&L responsibility, plus a smaller number of participants who have made the switch from individual contributor to business leader within the last 2 years.

All have in common the fact that their careers started out on a specialist path – our sample includes: scientists, IT technicians, economists, underwriters, quantity surveyors, accountants and HR professionals.

This is the first Xancam study into the 'Expert to Leader' transition. Here, we focus on *the experience of the individual*. This report outlines what motivated people to make this career change, what worked or did not work for them and concludes with some advice for both individuals and organisations based on their experiences. Our next research into this topic will focus at the level of the *organisation*.

Why do this research?

At Xancam we specialise in identifying and developing business leadership potential. We have worked with organisations across many different sectors and geographies to help them identify who, of their current high performers, has the future stretch potential to take on significantly more senior business leadership roles. Xpert2leader is a solution that we have designed specifically to identify and accelerate the potential of senior specialists who have the ability to step up to business leadership.

In our experience (and generalising very widely), organisations have tended to make a broad distinction between 'specialist' and 'generalist' career paths, with the business's future leaders typically being sourced from the latter. However more recently, organisations see the need to diverge from this approach and to base their talent strategy on a more fine-grained set of distinctions. When businesses map their strategic business drivers against key talent risks, this is the first step in identifying what we call **strategic talent segments**.

When we work with organisations to identify their strategic talent, we invariably find that talented specialists emerge as a mission critical segment. This is because in numerous sectors, deep expertise in the business's core capability is increasingly a vital source of competitive advantage.

As a consequence, many businesses now have a keen interest in leading-edge development solutions that effectively transform their specialists into well rounded business leaders. We decided to look more deeply into this issue to identify the lessons for both individuals and organisations.

The ROI case for managing the transition from expert to business leader

In a business climate where the focus is on achieving more for less and demonstrating value for money, HR and Talent professionals increasingly need to present a strong **business case** that clearly justifies the **return on investment** for their spend in talent and development interventions.

Some of the **business benefits** achieved by organisations that **actively manage** the transition from **expert to business leader** include:

- Growing talent internally is typically more cost effective (e.g. 60% **saving** on **recruitment costs** has been achieved)
- Reduces the risk and cost of **over-promoting** unsuitable experts into general management roles
- Speeds **ramp-up time** in role (typical ramp up period of 18 months can be reduced to as little as 6 or 9 months with the right support)
- Retains organisational **wisdom, proprietary knowledge** and **stakeholder** or **customer relationships** that have been built up over the individual's tenure
- Broadens each participant's **skill repertoire**, enabling them to deliver **greater value** to the business
- Achieves **greater leverage** of expertise, by enabling experts more effectively to **deliver through others**
- Reduces risk of **early failure** in role due to 'culture shock'
- Increases **retention** of talented specialists who have outgrown their current interests and now seek a new challenge.

THE QUESTIONS

We interviewed a total of 15 senior business leaders, each of whom had started out as specialists in their field. We asked the following questions:

1. What first *motivated* or *interested* you about moving away from your specialist focus?
2. What considerations *inhibited* you or held you back?
3. What were the main *challenges* or *difficulties* you faced in making this move?
4. What were the most important things you needed to *learn* or *acquire*?
5. What did you have to *let go of* or *leave behind*?
6. What would have *helped* to make the transition quicker or easier?
7. In what way are you *different* from former colleagues who have not made such a career move?

1. MOTIVATION TO MAKE THE MOVE

“What first *motivated* or *interested* you about moving away from your specialist focus?”

Summary

The main factors that motivated people to make the career move from specialist to generalist were:

- **Personal and career ambition** – generalist roles were seen to have better prospects and remuneration; more status, influence and responsibility
- **Personal development and growth** – feeling under-stretched or stale; wanting to develop new skills and seek a bigger challenge
- **A greater impact on the business** – a desire to shape business direction and strategy; drive business outcomes and commercial performance; an interest in external relationships with suppliers, customers and markets.

Personal ambition and the desire for career progression

This was one of the first factors that many respondents mentioned. The perceived benefits most frequently mentioned were:

- better career prospects
- opportunity to earn more money
- more status, influence and responsibility

Most participants expressed the view that moving away from their specialism towards a more generalist role was an essential means of progressing their career: *'If you have any ambition or spark, you treat your technical core as a springboard to do something else'*

Interestingly, the more senior (C-suite) participants we spoke to had from the outset determined that they would have a career in General Management and intended to move away from their original specialism as soon as they could. However for others, the move from specialist to generalist had been less calculated and more of a natural progression, particularly as a means to provide more in the way of development and growth.

Personal development and growth

For a number of respondents, the need to move away from their specialist role arose because they felt **under-stretched** or **stale** and saw **limited opportunities for development** if they stayed where they were.

'I had hit the ceiling with my specialist role. I am now growing my skills as well as growing the business'

'My old role was not stretching and not providing me with enough challenge'

'After a certain time in a job, you need a new challenge, and the challenge has to be wider'

A greater impact on the business

By far the most common reason given was the perception that by moving to a broader business leadership role, people would be able to make a **bigger contribution to the business**. This manifested itself in several ways:

Most respondents valued the opportunity to have more of a say in **shaping business direction** and **setting the strategy**:

'I can set the business's agenda strategically: how big it gets, what sectors we can go into'

The whole issue of **autonomy**, being **ultimately responsible** for and having **significant control** over business direction and **delivering commercial performance** was a very strong motivational factor indeed for many we spoke to:

'The ability to take full responsibility for the business was attractive; I went from 20% to 100% responsibility and liked the fact that I was dealing with [business performance] from beginning to end'

There was also the appreciation of operating **more widely** across the business; working on the **business leadership team** with heads of other functions and of becoming more involved in **different business disciplines**:

'I was attracted by the opportunity to make a difference to the business; being on the leadership team and being part of running that business'

Other respondents were motivated by a **more external focus** than was afforded in their specialist role:

'I was always more interested in external relationships – how we traded; how we did business'

'I was interested in where the products went, what people did with them, who the customers were and why they choose one product over another'

'Getting out and talking, having to represent the business in discussions and negotiations – it feels tons more 'human'

2. INHIBITORS AND CONCERNS

“What considerations *inhibited* you or held you back?”

Summary

The main factors that inhibited people from making the career move from specialist to generalist were:

- **Moving beyond the comfort zone** – concerns about the ability to contribute meaningfully to wider business issues and moving away from the comfort zone of their ‘home’ discipline
- **Personal risk and sacrifice** – that their career could ‘crash and burn’ if the move did not work, with the associated impact on finances and family life
- **The organisation** – organisational barriers were an inhibitor for some, but less so for more recently appointed participants

Moving beyond the comfort zone

This area accounted for most of the responses to Question 2. For some, the concern was about their ability to **contribute meaningfully to wider business issues**:

'You go from something you're very comfortable with technically – at the top of your profession – to where you are not an expert, e.g. business strategy, high level customer management, marketing, finance, people management'

'Making decisions about things that were way out of my role before – e.g. compensation; people management'

'It was 2-3 years after I got on to a board that I started to participate widely in discussing the whole business, rather than just talk about [own specialism]'

Secondly, the issue of moving away from a comfort zone related to leaving behind the **'badge of honour'** as **technical specialist** – participants made comments like:

'I had a slight concern about losing my grasp on the technical stuff'

'I was confident in my abilities and reputation as a [specialist] and you get cachet for being an expert, so it's a bit scary to move away from this'

However by far the biggest response in this area related to participants' concerns and discomfort around the need to understand and contribute much more widely on issues relevant to other functional disciplines.

Personal risk and sacrifice

For a number of participants – typically those in their 30s with financial and family commitments – there was a perceived risk of moving away from a role/career where they were reasonably successful and well paid to effectively take a **high-risk, high-payoff** decision:

'I was comfortable doing my [old] job and well on top of it. I thought if I fail, I will be out of work, so there was a big risk'

'There was a big fear of losing what I had and going into an area where I might crash and burn'

'I thought: 'Do I want a 20% pay rise and bigger responsibilities [in present function] – or jump across to something with no pay rise and 2-3 years to see if you made the right decision or not?'

The **impact on family life** was also a consideration for the more senior respondents. One observed that because of his change in role, location was not really a free choice and he had moved his son to three schools before the age of ten. Another had concerns about the potential financial impact on his family's lifestyle.

The organisation

A few respondents cited the attitude of **the organisation** as a factor that could have potentially inhibited their career progress. Interestingly, these responses came more from older participants (i.e. mid-40s and up) and likely reflect a time when businesses were less open to lateral career moves:

'In those days, if you hadn't carried a bag, you couldn't work in marketing – it was very siloed'

'Managers in my area would say to HR: 'If you take our scientists, you won't get your projects'

3. CHALLENGES & DIFFICULTIES

“What were the main *challenges* or *difficulties* you faced in making this move?”

Summary

The most common challenges and difficulties when moving from a specialist to general management role were:

- **Managing people** – many had previous leadership experience, but managing people as a general manager was more challenging (and time-consuming) than originally thought. There was more focus on achieving through multi-functional teams of senior experts
- **Building relationships** – some had previously underestimated the importance of stakeholder relationships (both within and outside the business) in enabling them to deliver
- **Focus on what is important** – it was challenging to step away from their ‘home’ specialism and technical details to focus instead on prioritising strategy and leadership

Managing people

By far the greatest number of responses to this question related to **managing people**. Although most respondents had previous people management experience, many were surprised at how challenging it was to move to a much larger people management role as a generalist. They found the adjustment to a role where their job was **predominantly about achieving through others** much more difficult than they had anticipated:

'I was taking responsibility for a much larger team – and one that is multi-functional, so understanding their drivers was a big issue'

'People management was the biggest challenge. As a General Manager, you end up probably at least 30% of your time dealing with people issues'

'It was a substantial change in mindset from me having to solve the problems to empowering others to solve them'

'I found I had to slow down my own pace in order to increase my people's'

It is not as though these respondents had no previous experience of managing people at all prior to taking on a generalist role. However the general manager's direct and indirect reports are often themselves senior, experienced people who hail from a range of **different functions**. In many cases they are **more expert** in a particular area than the general manager. Therefore the challenge is very much about how to lead and **deliver through** the expertise of **highly experienced and capable people**. This is a very different challenge than giving direction to a less senior team:

'The technical disciplines would know 100 times more than me and I'd always try to get the best from them. I was up front and always asking questions in a positive way'

Many respondents had totally **underestimated** the **percentage of their time** that would be devoted to managing and delivering through others. This was in contrast to their previous roles, where a higher proportion of their time was spent on actual problem-solving and delivery.

Building relationships

The next most popular response was about cultivating and managing relationships with 'the people that matter' – stakeholders both within and outside the business including peers, senior managers, and key contacts in the industry or other communities. Participants quickly grew to realise that the ability to do this successfully was a vital **enabler** of their own **ability to deliver**:

'I didn't realise I needed to cultivate relationships so I was quite transactional and didn't have enough contact with people at first. This became a problem when I wanted to do things and it was all more difficult than it needed to be'

'Sometimes I'd be 'clever' and win an argument, but senior people do not like a smart-ass'

Prioritise and focus on what is important

Successful transitioners had to change their mindset about what is important and what they should most productively spend their time doing.

For some, this meant an ability to **step away from detail** and learn to give *'comments that are over-arching yet still incisive'*

Others would find themselves having to **resist the temptation** to continue **acting like an expert**:

'Someone would come to me with a [specialist/ technical] problem and I had to overcome the feeling 'I could do that!'

Most participants realised that becoming embroiled in details and technical issues was counter-productive in their new role, but this change in mindset was not easy and required a degree of **self-discipline** and **assertiveness**:

'Saying 'no' to things at first was difficult. I had to say 'I don't do that anymore, my role is to lead the business'

In a related vein, people found **time management** a challenge, and this appeared to be related to their ability to prioritise and focus their time on what is important in the new role – deciding what (and more importantly what not) to get involved with:

'The first six months was hell – I felt I wasn't adding anything to the business. I spent almost no time on big picture/ strategic work or customer management. I was working 18 hours a day and weekends'

4. ACQUIRING THE NEW

“What were the most important things you needed to *learn* or *acquire*?”

Summary

To perform successfully in a general management role, participants needed to acquire:

- A different leadership mind-set – feel comfortable being more visible; drive performance – by engaging people, being firm with performance issues and building good capability
- A wider network – beyond their own specialism, business and industry – stakeholder and influencing skills became critical
- Confidence to make judgement calls – not having all the ‘right answers’, but dealing with ambiguity to ask the right questions, make confident decisions and move things forward

A different Leadership mindset

As may be expected from the question on 'biggest challenges', Leadership came up as an important skill set that had to be acquired and generated the greatest number of responses.

However, not all of the responses were about standard 'people management skills' – but were about deeper characteristics, in particular the need for what one participant described as an **identity shift** in seeing themselves as a leader, and ensuring that others appreciated this position.

The move to general management typically involves a much bigger role with wider organisational impact. Therefore it has meant doing more in the way of **public leadership**, building **gravitas** and spending time standing up in front of a big team and being **exhortational**. There was a real sense that as a general manager, respondents felt much **more visible** and required to be a **role model** for their people:

'I had to build my gravitas and do much more by way of public leadership – standing up in front of a big team and being exhortational'

'People notice if you come in late or go home early'

Another factor was the need to **drive a performance culture** by being tough on performance issues and having a readiness to 'make people uncomfortable if needed'. At the same time, they needed to understand emotional drivers in order to **engage** and **motivate people** from a range of **different backgrounds**:

'How you manage and motivate sales people for instance is very different from how you motivate lab scientists. With scientists it's all about publications and conferences; with sales people it is about kudos and cash'

'I had to learn to delegate to people in a way that made them feel they are helping me run the business'

They also acquired a stronger focus on **developing talent and capability** to drive business performance:

'Getting in place a first class team – when we got rid of some people doing an average job and got better quality people, the business's performance rapidly improved'

'Setting the people agenda – looking at who is good and who is not; who is on the succession path to deliver what you need to deliver'

A wider network

This was the second most frequently cited area by the respondents. Respondents valued the network as a means of **personal support** and also appreciated the importance of their role in **representing the business** with **external stakeholders**. They also recognised that their network had to become much **wider** to extend well beyond their former specialism:

'If you are at the top of the organisation you need a good network of people outside the business you can bounce ideas off. I wish I'd known that in advance'

'It took me 2-3 years to build a wider network [beyond my former specialism] including contacts in pretty much every industry to get a picture of what's happening at senior level'

Respondents also recognised that managing a wider network of stakeholders means developing **stakeholder management**, **relationship management** and **influencing**

skills at a significantly more **senior level** than previously and in some cases this meant better **cross-cultural** skills too:

'You get involved with non-execs, regulators and other external relationships. There are many more stakeholder views and interests to manage'

'You have access to people at a higher level to initiate meetings and have discussions that you wouldn't have had previously'

Confidence to make judgement calls

The issue of **making confident judgements** was an often cited skill that people needed to acquire. Respondents observed that the shift from specialist to generalist means there are many fewer definite or black and white answers, and fewer rules, guidelines or precedents to refer to. Instead, they find themselves having to deal with **ambiguity** and to develop **problem solving skills** so that they can make **decisions to move things forward**:

'You no longer have the 'right' answer. You have to form an opinion on a set of facts that might not be fully formed and move forward'

'You end up with a much bigger toolbox to solve problems and make things happen'

However, increasingly, respondents observed that the ability to **ask questions** became a vital support to effective decision making:

'In a technical role you are expected to have 'the answer'; when you move to general management, you have to facilitate and garner the information from the team'

'You shouldn't fool yourself into thinking you're the person with all the answers'

'You will have some answers, but the skill you need most is being able to pull other people together to get the answers'

This reflects the responses we saw to question 2 ('challenges'), where people are managing senior experts, often from a range of different functions and disciplines. Therefore, asking the right questions and integrating responses from a range of experts is a critical skill to support the more complex judgements that need to be made as a senior leader.

For many of our respondents, this significant **shift from giving answers to asking questions** represented one of the biggest changes in mind-set.

5. LETTING GO OF THE OLD

“What did you have to let go of or leave behind?”

Summary

Respondents found that when they switched from a specialist to a general management role they needed to let go of factors that had been important to their success as a specialist:

- Attachment to their original specialism – many were tempted to revert back to their comfort zone and re-engage with specialist work. It was helped if they appointed a good specialist in this area to the team
- Detail – participants had to become comfortable with much less detail and be prepared to delegate detail to their team. They also needed to look at long-term more than detailed short-term time horizons
- Being ‘one of the lads’ (or girls) – as a business leader, people felt they had to distance themselves somewhat from previous peer relationships, and that this was important in being able to handle performance issues

Stepping away from the specialism

The literature on effective transitions constantly emphasises that in addition to acquiring new skills, it is important to learn how to 'let go' of skills, habits or approaches which have worked very well in previous roles, but which can actually be counter-productive in a more senior position.

Perhaps unsurprisingly, most of the respondents talked about the difficulty of letting go of their attachment to their original specialism. This manifested itself in a number of ways.

Some respondents were quite **deliberate** in **standing back** from their former role and appointing a **good specialist** to perform this work. One former Finance Director recalls:

'When I became MD, I pretty much stepped away from Finance and made sure I put someone I trusted in there and let him get on with it'

Another said:

'I have a good Finance Director and I left it all to him and purposefully stayed away from Finance as it would have been easy for me to lapse into my old comfort zone'

However, some respondents still found it difficult to step away from their specialism, with a negative impact on either their team's or their own work:

'I used to be drawn back into the comfort zone [of my specialism] as I was comfortable with it and my successor was less experienced, so I was spending more time on this and not getting on with my own job'

And a former quantity surveyor (now a Business Leader) admits:

'When I was really down, I used to love to go and do a bit of surveying! It was difficult to let go because I felt comfortable doing it, but I was annoying people because I wasn't letting them do the work they should'

Stand back from detail

As the progress from specialist to generalist requires less technical input, so it requires less of a focus on **detail** and a greater degree of comfort with **delegation** – even if those to whom a task is delegated may perform it differently than the person would expect.

'I am now less in control of detail – I make fewer decisions and I am happy for us to make mistakes'

'I used to be a real stickler for detail but I have really had to stop. I have to refer to the back up information rather than get involved in the detail'

'There is the temptation to check and double check, but this means you are just doing things double'

The need to step back from the detail also related to the **timeframes** that respondents found themselves operating on. They had to stop the tendency to devote most attention to short-term details and replace it with an ability to **balance** this with a **longer-term view**.

'I had to stop thinking only about next week or next month and think also about next year. There was a dual pressure to achieve short-term objectives and have a long-term view'

Stop being 'one of the lads' (or girls!)

This issue is perhaps not solely restricted to those moving from a specialist to a business leader position, but was nevertheless often raised by respondents in our survey. Many talked about having to **let go of 'mateyness'** with colleagues and **stand apart** from them as a leader. One respondent in the construction industry used a sporting analogy:

'In my old job I was like a team captain playing on the pitch with the players. Now I am like the manager on the sidelines and I am on my own. Leadership can be a lonely place'

Others say:

'I was less 'one of the lads' and became a little more detached from the team. I did not mix so much socially'

'I've done a number of presentations to people with whom I used to be best mates and now I have to stand back as a senior manager and not get involved in personality – I will have a laugh and a joke, but not be a mate'

Respondents also observed that a certain amount of **personal detachment** was necessary to enable them to deal effectively with **performance issues**. In fact, several observed that since becoming a business leader they had become much **less tolerant of under-performance** than they were when working alongside the same people as a peer. The change in the closeness of the relationship with the team was important to support their ability to tackle performance matters dispassionately.

'I had to become better at dealing with poor performers. That's part of moving away from the team as you're going to have to shoot some of these guys'

6. WHAT WOULD HAVE HELPED?

“What would have *helped* to make your transition quicker or easier?”

Summary

There were consistent responses about the type of support that could have made respondents’ adjustment to a generalist role quicker and easier:

- **Mentoring** – from an experienced senior manager was mentioned by practically all respondents as a useful ‘short cut’ to get up to speed in the role
- **Emotional support** – was appreciated and seen as an additional benefit of effective mentoring
- **Advance training and preparation** – respondents value formal development input given well in advance of their appointment

It is all very well to be wise with hind-sight! However, we asked participants what support they did not receive – but would have liked to receive – to make their transition easier and more effective.

Mentoring

Mentoring was by far and away the most commonly mentioned item – and in fact was listed by all participants. Most were very clear in defining mentoring as support and wisdom from a senior colleague who has ‘been there and done it’ before them. This was quite distinct from other kinds of support such as external coaching or the support of their boss. In most cases, the respondents saw a **suitably experienced senior manager** (not necessarily their line boss) as a suitable mentor:

‘Mentoring from a senior manager to warn me of the hard knocks that were coming’

‘Mentoring from someone with good experience, or who is really good at the skills I lacked’

‘Having a mentor from someone already in a similar position. A lot of what I learned could have been explained to me in the first couple of months by someone who’s had the same experience’

Other participants felt that a ‘heads up’ from their **predecessor** would have been very helpful:

‘I would have liked to sit down with my predecessor so he could tell me if I was spending too much time on certain things or to talk about how I manage strategic decisions’

‘They may say ‘don’t worry about that, it’ll fix itself. What you really need to worry about is...’

In short, a lot of respondents saw mentoring by an experienced person as a useful **short cut to getting to grips** with the new role and in helping them how to better **prioritise on where to focus** and how to manage their commitments.

Respondents also saw the value of **informal mentoring** and of mentoring via a **network**:

‘Informal mentors are very important. Someone you can talk to and say ‘I am really worried about x’’

‘A network of mentors is important because in some of these jobs you feel very isolated. Not necessarily a formal mentor, just someone you can speak to’

While many participants identified the value of mentoring as a short cut to learning the job, others saw the value of a mentor (or arguably a coach) for **emotional support**:

‘Someone independent of my line management chain, who I could bounce ideas off and talk things through with – or just let off steam’

‘To help me through dealing with difficult people – or at least a shoulder to cry on’

A number of respondents also felt that networking with and support (or mentoring) from **peers** (i.e. opposite numbers in other business divisions) as potentially very helpful. However the experience of this was variable:

‘In my day we weren’t a business where you could pick up the phone and speak to your equivalent in another division to ask for advice; people didn’t want to give you advice’

Advance preparation

The level of training, development and preparation respondents had received prior to taking on a general management role varied considerably in different organisations. Those who had more recently succeeded to general management roles (within the last 10-15 years) tended on average to have received more training and better preparation for their role than those who had succeeded to general management positions at an earlier time. This likely reflects more recent advances in leadership development and an increase in modern organisations' appreciation of the business benefits.

Nearly all participants said that they would have valued better advance preparation for the role and often referred to **management training**, with the most frequently requested being business school courses and/or MBA in general management to identify different business models, analytical techniques and approaches to market and competitor analysis; people management and high performance teams.

Several participants had the opportunity to participate in their organisation's **fast track leadership programmes**, which they found beneficial and which helped them to understand different business disciplines.

However some participants received next to no preparation:

'I was a technical director one day and an MD running a business the next. They said I'd been on the succession path for two years, but I was given no preparation'

And yet others did receive skills development – but not until they had been in role for a while:

'I had some management training, but I didn't receive it until 6-8 months after I'd been appointed. I am now defining development paths for people in my team to prepare them for larger roles well in advance'

7. IMPORTANT DIFFERENCES

“In what way are you *different* from former [specialist] colleagues who have *not* made such a career move?”

Summary

Respondents saw some consistent differences between themselves and their former specialist colleagues who had not made the move to general management:

- **Broader view** – more interested in strategic issues than individual tasks and consider their impact on wider business value
- **Career ambition** – highly motivated by career progress and prepared to make the attendant sacrifices this can involve
- **Risk appetite** – more prepared to take significant business risks
- **Judgement calls** – less reliant on rules or proof to support decisions and more confident to make judgement calls

We asked our sample of successful transitioners to describe how they felt they were different from former colleagues who had not progressed to general management roles, but who had remained in their technical specialism. The respondents were surprisingly consistent in identifying similar themes.

Breadth of view

This was the most frequently made observation made by our respondents. People who have left their specialism behind and progressed to a more general business leadership role, consistently observed that their 'specialist' colleagues tended to prefer a **narrow focus on specifics**, whereas our respondents were interested in thinking more **holistically**:

'There's a narrowness to what they do. Sometimes they don't see the wood for the trees and don't have that 'step back' ability to see the one thing that will either win a piece of work or sort a problem out'

There was also an observation that general managers like to take a more **entrepreneurial** and **strategic** approach than their specialist colleagues:

'I prefer to think outside the box and question things, whereas specialists just focus on the day job and are less strategic. If you give them a task, they'll do the task, but they won't think of anything else'

'In my current role, I have wider responsibility and a higher point of observation – instead of just focusing on my job and my issues'

It was also observed that our general manager sample was interested in much **wider business issues** and the impact on **business value** than colleagues in their original specialism:

'They will approach issues from the functional view only and don't put different lenses on'

'Many of my former colleagues would be exceptionally bored by some of the Exco stuff like relocation, redundancy schemes, etc'

'They are more interested in technical aspects than the value of the business – like analysing the characteristics of concrete really fires them up!'

'Experts believe that their specialism has the answer to all the problems – but general managers have a more comprehensive and flexible view'

Ambition and career motivation

Perhaps not surprisingly given earlier observations to Question 1, our sample observed that their former specialist colleagues had different priorities in terms of **career ambition**:

'They are less ambitious and prefer to spend more time with their families'

'They are not hungry for it – prefer to stay in their comfort zone'

'Some people just think 'this is too much' – they are content to do their present job and don't want more responsibility'

'They tend to be more content with their life as is and don't want any more hassle'

So amongst the responses we observed that those who had taken the step to general management regarded issues relating to ambition, hunger and refusing to be content with the status quo as key drivers in making this move and also (as per Question 1) seeing that this would be important to progress their careers.

Risk appetite

A large number of respondents felt that they had a much bigger **risk appetite** than colleagues who had remained within their specialist field. Interestingly, the risks raised under Question 2 ('concerns') related to **personal** risk and sacrifice. However when asked to compare themselves with other specialists, our respondents outlined their appetite to take more **entrepreneurial** and **commercial** types of risk than their specialist colleagues:

'There's an element of needing to have courage, entrepreneurship and willingness to take risks'

'They will always hide decisions behind 'because of the rules' – but you don't have that safety blanket [as a general manager] if you are deciding to go into a new market, launch a new product or put in a different policy for sales performance'

'They are more into risk management than opportunity'

'I like taking risks and seeing if they will work out – my former colleagues do not'

Confidence to make judgement calls (again!)

The ability to make judgement calls was something that many participants felt they had to learn or acquire when they switched from a specialist to a more generalist role (see Question 4). Interestingly, our respondents also noted this as a fundamental **personal quality** that distinguished them from people who had remained in a specialist role.

This included having the **courage** to make **big decisions** in the face of **ambiguity** or **incomplete information**:

'A lot of [specialists] pull back on the big decision and ask advice and want the comfort of certainty; I'm more willing to make the call'

'Functional specialists are more interested in accuracy. I am more 80/90% right and move on'

There was also a consistent opinion that our respondents have developed their ability to make **judgement calls** and be less dependent on **proof**:

'As a specialist, you want to be convinced all the time and need proof, but nowadays it's a more judgemental thing and the ability to say 'I know you are wrong'. I am able to read people and know if they are lying or haven't done stuff'

Our generalist sample also felt that specialists are more dependent on **rules**, whereas in their generalist role they have to be more **confident** about using their own **discretion** or **judgement** and **taking ownership** for doing that:

'They hide behind rules, laws, etc and disembodify decisions; whereas I have to take personal ownership of the decision'

'There's something about judgement and not being fanatically committed to following the rules mindlessly'

CONCLUSIONS & RECOMMENDATIONS

On the basis of our research findings with people who have made a successful transition – and taking into account what is known about leadership development more generally, we have identified some conclusions and recommendations for both businesses and individuals

Business Benefits

Identifying experts with Business Leadership potential

Now more than ever, organisations need high levels of confidence if they choose to invest significantly in developing senior specialists for future business leadership. The right approach to identifying experts' *true potential* for more generalist leadership roles is an essential step in ensuring that development interventions are targeted where they will deliver the best return on investment and that the right succession decisions are made.

Xancam's research on high potential has indicated that there are certain abilities which distinguish high performers from high potentials. We know that high potentials are usually: strong performers at their current level; have the mental agility to work with strategic issues and long-term timeframes; have the emotional agility to manage effective relationships; the learning agility to develop and grow and a set of aspirations consistent with progressing to more senior levels.

This research paper suggests that in addition to these things, what **drives** or **motivates** people is an important predictor of their likelihood to make a significant career move from 'expert' to 'leader'. Experts who successfully become leaders are motivated by:

- **Leverage through leadership** – they very much *want* to take on a leadership role and to deliver *through others* rather than be the sole owner of expertise or answers – and they are prepared to let go of their reputation as expert or guru
- **High risk-high-reward** – courage and confidence to take significant risks both personally and professionally; motivated by potentially high payoffs
- **Commercial contribution** – a strong desire to have real influence over business direction, to influence areas outside of their home discipline and responsibility for driving commercial (not just technical) performance

Choosing the right development solution

There are now a wide range of leadership development solutions on offer. However, development to support experts transitioning to business leadership roles needs to be different. It is not just dealing with a transition from 'team member' to 'team leader', and it is not just about imparting generic business knowledge and skills. Instead, it needs to address important factors relating to the person's identity as an expert or 'senior specialist'. Additionally, given that these individuals already have a significant store of expertise in their specialism, successful development will focus not just on what has to be learned or *acquired*, but also on what approaches or habits have to be *left behind* in order to be successful in a new context.

A basic grounding in business knowledge and skill was seen as important by our respondents. It enables the expert to contribute more confidently and meaningfully on business issues outside of his or her home discipline (such as Finance, Marketing, HR and key product, service or customer issues). However, knowledge and skills are relatively easy to acquire by experts with a sound intellect, but account for rather less of the variance in making an effective transition to business leadership.



*Knowledge and skills are easier to acquire, but have less influence on a successful transition than changes in **personal identity***

The most significant factors in making an effective transition relate to the individual's:

- **personal identity** – can they relinquish their 'badge' as expert and carve out a new identity as business leader; become comfortable to ask questions – rather than have all the answers; be a 'leader' rather than one of the team
- **beliefs and values** – a need to revise existing beliefs and priorities; for instance, that managing *people* and *relationships* is as (or more) important than delivering on *tasks*
- **purpose and context** – re-thinking how they now add value to the business; less emphasis on personal delivery and more on leveraging people and resources; less time on detail and more time on strategy

To achieve this kind of shift, a truly effective development experience for those making the transition from expert to leader will incorporate activities designed explicitly to: question existing beliefs, uncover hidden assumptions and *reframe* important aspects of identity, beliefs and values.

Shorter ramp up time

In the introduction, we touched on the fact that when organisations actively manage key role transitions, the ramp up period can be significantly shortened. In his studies on transitions, Michael Watkins in 'The First 90 Days' observed that if unsupported, it could take as long as 18 months before full performance in the role is achieved. However with the right support, this can be significantly shortened – to as little as 6 or 9 months. The commercial benefits of a shorter ramp up time are clearly apparent.

Role transition support is particularly useful for experts making the transition to business leadership. This is a form of development that supports the individual for the first six months in the new role. Using accelerated learning techniques, role transition support challenges the individual to explore (and overcome) the limits of their comfort zone. This speeds up transition time by overcoming many conscious and unconscious barriers to learning and change.

It was noted that many participants in our survey indicated that working closely with an experienced mentor was an invaluable means of speeding up their transition, effectively giving them useful tips and short cuts. Our experience is that business mentoring can indeed be invaluable as a means of passing on useful tips and information. When coupled with transition coaching to address aspects of identity, beliefs and values, its effect in shortening ramp up time can be considerably enhanced.

Advice for individuals

Weighing up the benefits and costs

As many of our respondents indicated, the decision to move away from the comfort zone of one's professional specialism and to take the relatively more risky option of a generalist leadership role is not something to be considered lightly. However those who made the transition successfully felt the benefits were clear. They derive satisfaction from the larger say it gives them in shaping business outcomes, the increased variety and challenge and enhanced career and remuneration opportunities.

Those who are considering whether this move is right for them need to consider a range of factors but with a particular focus on:

- Do I have a real passion for leading and achieving *through others* – or do I prefer to be personally responsible for delivery?
- Am I motivated to run a business and make a direct impact on commercial performance?
- How would I feel about losing my status as 'expert' (or even 'guru') in my field?
- How comfortable would I feel allowing my expert knowledge to fade/ become out of date?
- Can I make judgement calls – or would I rather have established rules and guidelines to refer to?
- Am I prepared to take the personal and professional risks needed to make this career change?
- What might be the impact on my finances and work-life balance?

Understanding and desire

In our work on developing leadership potential, we encounter many people who express a strong desire to progress their career – but fewer who have taken active steps to find out more about what operating at a different level or in a different situation really means.

Finding opportunities to have a **realistic preview** of the role change – and what it means in reality – is a vitally important step to making the right career move. Many of our respondents were rather shocked by the changes in demands; finding out about the reality in advance of making the change enables a more realistic set of expectations and reduces the risk of 'culture shock' in a more generalist role.



Final thoughts

Choosing and then successfully managing the transition from expert to generalist leader comes with its challenges and needs focus and time to think through the implications.

Through our work with successful transitioners, we know that a fundamental requirement for success is for the individual to move from a **self-focus** to a **selfless focus**. When this happens:

- achievement becomes less about themselves and more about others
- the emphasis is less on functional tasks and more on driving business performance
- they actually *want to lead* – enabling achievement *through* others rather than solely by their own efforts
- they are highly motivated to take on the leadership mantle and:
 - give feedback
 - have difficult conversations
 - support people to find their own levers of motivation

With a self-focus, people are leaders in name only. However, with a *selfless* focus, business leaders are fulfilled in themselves and ultimately add significant value to the organisation as a senior leader.

About Xancam

An established firm of Business Psychologists and Talent Specialists, we work with some of the world's leading organisations to identify and develop talent. Our solutions are pragmatic and commercially focused, enabling our clients to build a pipeline of talent that delivers their strategic priorities.

Xpert2Leader is Xancam's latest, leading-edge talent solution. It transforms talented experts and senior specialists into successful business leaders.

For more about Xancam, our services and our clients see www.xancam.co.uk

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