

# THE EXPERTSHIP MODEL

EXTRACT: CHAPTER 2

# MASTER EXPERT

HOW TO USE **EXPERTSHIP** TO  
ACHIEVE PEAK PERFORMANCE,  
SENIORITY AND INFLUENCE IN  
A TECHNICAL ROLE

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# The Expertship Model

## A roadmap for aspirational experts

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### In this chapter, we will explore:

- The three levels of Expertship, and why the highest level, Master Expert, the title of this book, requires a roadmap for experts to follow and master.
  - How the Expertship model provides a complete description of the skills, experiences and mindsets that are required to reach Master Expert level.
  - Each of these capabilities, in addition to their respective expert roles, are introduced in this chapter and explored in greater depth later in the book.
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**THIS CHAPTER IS ABOUT** helping experts understand how good they are at their jobs. Superfluous, you say? We already know how good we are—because we’re experts!

The reality of the situation is that most experts we work with operate in a feedback-free zone. They either don’t get any feedback or they discount the feedback they do get because it’s offered by people who don’t understand the complexity of what they do.

In this chapter, we’re going to provide a proven and valid method that will enable every expert reading this book to begin the process of assessing how good they are. We answer these critical questions:

- What do I actually need to do to be good as a Master Expert?

- How do I, or others, objectively measure my capability? Against what scale? Against what criteria?
- How do I escape from my feedback-free zone and get objective and constructive feedback that's news I can use?

## In Search of Expectation Clarity

IF EXPERTSHIP IS A description of what experts do, then defining exactly what that is for all experts is a much larger undertaking. Most experts will imagine that what we do is very specific to our own particular role.

This is typically true when we consider the technical aspects of our roles. But beyond our detailed technical knowledge and skills lie *enterprise skills*, which are the capabilities that enable us to apply our technical knowledge to great effect.

Over the last five years, we've worked with over a thousand experts, asked each of them this question, and then captured their answers. In workshops around the world, we've asked them to describe the capabilities and attributes of the best experts they've worked with. We've also asked them to describe what characterized the worst experts they have worked with. The results, regardless of country or culture, are remarkably consistent.

*“What are the attributes and skills of the best experts you have worked with?”*

Taking into account all of these responses, we defined and then refined a capability model, which we've called the Expertship model.

At its highest level, you'll see it represented in Figure 2.1 below. Experts need to be good at three things: technical ability, creating value, and managing relationships effectively. We call these the *three domains of Expertship*.

Of the three domains, we have classified two as enterprise skills and the other as technical skills. Historically, experts have focused on achieving a very high capability in the technical domain, but this book is about how to reach even higher levels of expertise and value by mastering both of the enterprise domains as well as our already acquired technical skills.

## The Expertship Model

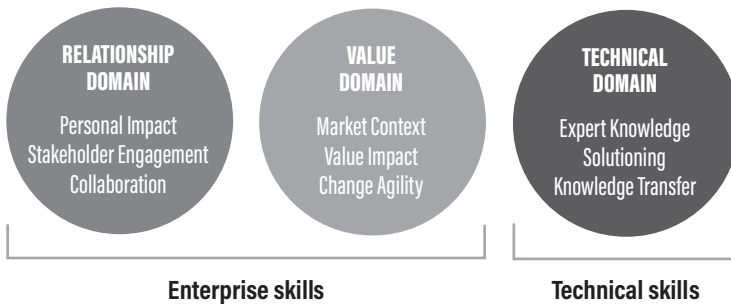


FIGURE 2.1: The Three Domains of the Expertship Model

The **Relationship Domain** covers capabilities such as:

- Identifying which key relationships and stakeholders are integral to your success.
- Understanding the needs and motivational drivers of these stakeholders.
- Effectively engaging and influencing these stakeholders.
- Relationship building and collaboration skills, i.e., building trust, advanced listening skills, mastering courageous conversations, and building impactful coaching skills that allow for knowledge transfer.
- Having positive personal impact by developing a genuine and effective personal brand.

Underpinning all of these is an understanding of what typically makes human beings tick.

*“Underpinning the Value domain is an understanding of the levers that make your organization successful.”*

Many experts in technical roles have had little or no exposure to this kind of material. They have *under-invested* in building stakeholder engagement and interpersonal skills. In our experience, most experts can easily learn the concepts and techniques required to quickly become extremely capable in these areas.

The **Value Domain** covers capabilities such as:

- Understanding the context in which your organization operates and the trends and pressures that impact its current and future operation.

- Understanding, where relevant, the competitive environment of your organization, as well as its strengths and vulnerabilities in comparison to rival organizations. In the public service sector, this often means identifying alternative services the community that are a substitute for yours and the impact this might have on your organization.
- Understanding how internal and external customers choose what products and services to buy and consume, and why.
- Being curious and very informed about future trends on all of the above aspects of market context, and thereby being able to operate strategically over the long term by developing plans and initiatives that position your organization for future success.
- Understanding how, in this context, you, as an expert, can deliver the most value to your organization (for today and tomorrow).
- Understand the expert's role in driving and supporting change initiatives that enable the organization to succeed in the future.

Underpinning all of this is a commercial and community awareness, and an understanding of the levers that make your organization successful.

Typically, this is the weakest domain for existing expert performance, but it's also the greatest opportunity for experts to grow their capability. In the Relationship domain, experts build relationships that help them get things done effectively, while prowess in the Value domain helps experts decide what to do and why, as well as how to add the most value.

Finally, there is a **Technical Domain**, which covers capabilities such as:

- Identifying which key information sources are critical to our success.
- Maintaining and providing access to information sources for key stakeholders across the organization, thus reducing their dependence on us.
- Understanding how stakeholders prefer to consume information and applying the relevant versioning processes and policies.
- Maintaining currency of our expert information and ensuring its currency in the future.
- The ability to create new knowledge from the insights we receive from various information sources.
- The ability to solve complex problems quickly, which we call "solutioning."
- The ability to build the capability and self-reliance of the wider organization by effectively sharing knowledge.

Underpinning all of these is an understanding that information is valuable. Many of the experts we work with naturally consider this capability one of their strengths. But while they may be assessed positively by their peers in terms of having great technical knowledge, they're typically rated

less enthusiastically when it comes to making their knowledge accessible to others.

## Using the Expertship Model

**IF LEADERSHIP IS WHAT** people leaders do to lead people, then Expertship is what experts do to ply their trade. The Expertship model describes these capabilities.

*“A tool for many tasks: how best might we use the Expertship model?”*

People leaders have had capability frameworks available to them to act as a roadmap for their professional growth for decades. Technical experts have had competency frameworks available to them as well, but these have typically been exclusively used to describe *technical* competence. For example, one of our client organizations uses a very detailed project management competency framework. This described the technical processes involved in project management. Professional bodies often have detailed technical competency frameworks (the engineering profession is a good example). All of these frameworks describe the technical skills required, but not the *enterprise skills* that we include in our framework (see Figure 2.3).

The Expertship model is designed to assist experts, their managers, and their colleagues with understanding what it is to be a Master Expert. The model is used in many organizations for a variety of purposes:

- **Self-reflection and assessment by individual experts:** as you will see in detail in this book, every behavior is described, explained and explored, enabling experts to self-audit.
- **Reflection and assessment by managers:** managers often can't put their finger on the precise behaviors that, if mastered, will catapult their experts to a higher level of performance. The detailed descriptions in the model help them identify what is missing or what could be boosted.
- **HR teams, for shaping bonus and performance frameworks:** who is really doing high-value work and creating new value for the organization, and how do we measure this fairly?
- **Learning and development teams:** using the model to assist in the design of programs that help experts build their capability and worth.
- **Expertship coaches, like the authors:** we use the capability framework to help us frame conversations with experts and help our coachees find strengths to build on and gaps to address.

## The Three Levels of Expertship

**EVERYONE, REGARDLESS OF THEIR** line of work, needs a description of what “good” looks like. This is as true for experts as it is for people leaders. We might argue that it’s even more necessary for experts because they’re frequently measured (and measure themselves) only in technical terms.

In sports, a variety of measures are quoted (via statisticians) to reflect how well one player’s performance compares with another. In many sports, there are also different levels of play.

The Expertship model has three levels of capability (see Figure 2.2). These describe the levels at which experts typically operate, and a fourth level describes the *derailing* behaviors that get in the way of experts performing well.

*“Derailing behaviors: which behaviors get in the way of being a great expert?”*

## Specialist

**THE LOWEST PERFORMANCE LEVEL** in the Expertship model is Specialist. Those we have worked with who profile at this level are often starting out in their expert career or have possibly recently switched roles into a new or adjacent technical specialty. They typically perform very transactional work that’s directed to them by others.

Acquiring knowledge, skills and experience is often the main focus of their attention, in addition to learning from mistakes and shadowing more experienced experts to understand how and why they operate in the way they do. The work specialists carry out tends to be highly transactional, focused on making things work properly today, and usually has a strong internal focus. Many specialists work in backroom roles, with little external contact with those outside their department or the organization. Specialists are typically learning their trade.

There is nothing inherently wrong with operating at the Specialist level of Expertship. It’s simply a stage on the way to greater mastery of the expert’s chosen domain expertise. Most experts operating at the Specialist level have a burning ambition to attain a higher level of capability as quickly as possible.

It’s important to note that, traditionally, these experts have imagined that this will be achieved purely through the acquisition of more *technical* expertise. But consideration of the Expertship model shows them that



broader *enterprise* skills also need to be acquired. This is an insight that usually accelerates their career for reasons we'll discuss throughout this book.

## Expert

**THE SECOND LEVEL OF** Expertship is the Expert level. At this level, we're describing very capable experts who typically have a lot of experience, skills and knowledge.

The work done by experts at this level varies widely. Plenty of tactical and transactional work still needs to be completed, but occasionally, this will be supplemented with some strategic or longer range work. Much of the work is still reactive rather than proactive, but greater exposure to colleagues outside the technical department and possibly outside the organization takes place. At the Expert level, there will be a focus on continuous improvement and productivity outcomes. However, the main focus will remain at the departmental rather than what we call the Enterprise level.

The vast majority of experts we have worked with over the last few years have profiled at the Expert level of the Expertship model. And most of them felt they were operating at the highest level of Expertship possible. For many, it was a rude awakening that we had defined a level of Expertship above the Expert level.

## Master Expert

**THE MASTER EXPERT IS** working on tasks and projects that are strategic rather than tactical, transformational rather than transactional, and on the far horizon rather than the near horizon. Master Experts are proactive and determine their own work and priorities because the organization sees they can identify the value they can add better than any one else. Master Experts operate across the enterprise, with stakeholders at senior levels of the organization and outside of it. They're focused on both internal and external customers. Given this description, it will be no surprise to read that they're often at the center of innovation projects and frequently act as a catalyst for change. They dream up the future and then get buy-in from the rest of the organization to fund and create it. Most experts aspire to reach this level of influence and impact.

# The Three Levels of Expertship

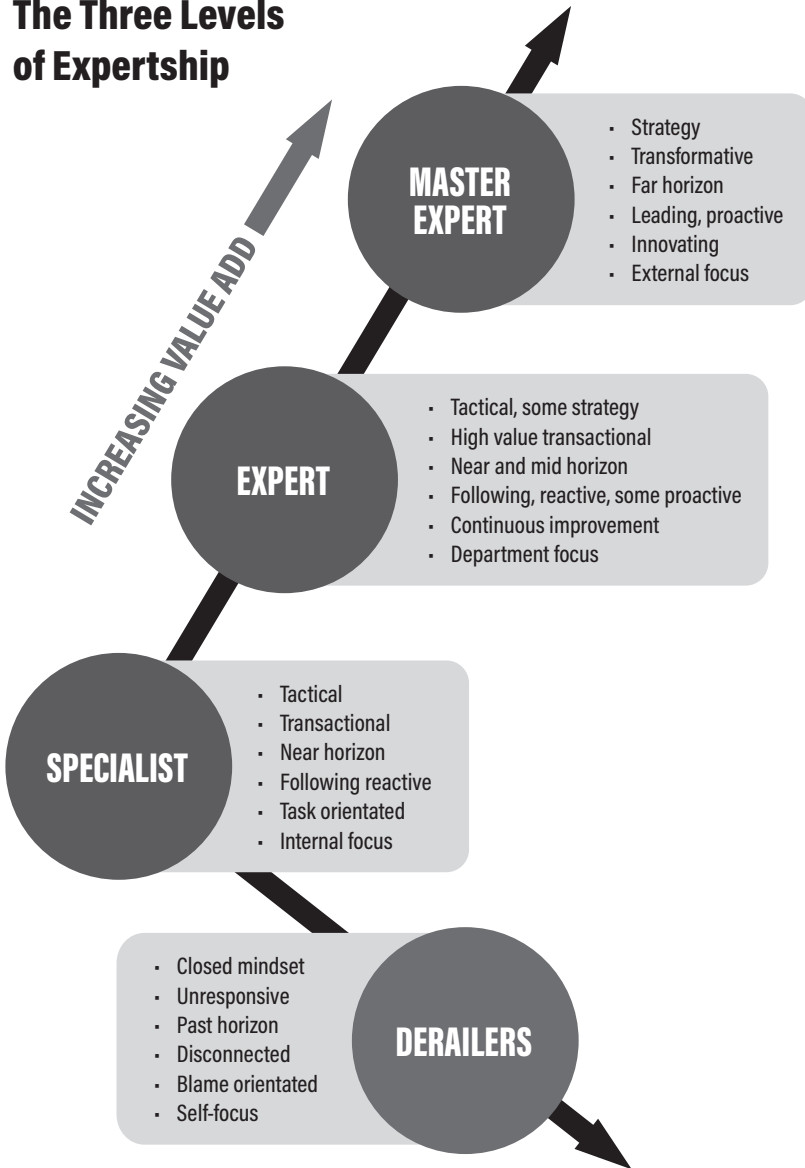


FIGURE 2.2: The Three Levels of Expertship

## What Are Derailers?

**A DERAILER IS AN** expert behavior that gets in the way of our progress. We call them derailers because they're like a train coming off a railway track. We call these behaviors derailers rather than weaknesses because weaknesses are often viewed as structural and unchangeable. By comparison, once an expert is aware of the impact a derailing behavior can have on their ability to get things done and deliver value, they can quickly adjust that behavior.

*“Improvement science: how do experts escape the feedback-free zone, and what’s the payoff?”*

Derailers develop for a range of reasons. They can develop when a particular skill or talent is deployed too often. For example, some experts like to remind their colleagues and stakeholders of how expert they are, and they tend to do this frequently. This can be because they lack awareness or don't understand the negative impact a particular behavior has on their colleagues and other stakeholders.

Experts are renowned for “knowing best” because they are, after all, the experts. This means they can stop listening to alternative points of view, particularly if that point of view is expressed by someone who isn't perceived to be an expert in their domain. Many experts do this unconsciously.

In the Expertship model, we have called out a range of behaviors or habits we see as derailers. We do this at a granular level, chapter by chapter, throughout this book. But in summary, they can include behaviors such as having a closed mindset, being unresponsive to client requests, being focused on the past or what has worked before, a lack of connection with critical stakeholders, a blame mentality, and being very much focused on their own needs rather than the needs of their department, the wider organization, or external stakeholders, such as customers.

## What Is Your Level?

**OUR WORK AS EXPERTS** is highly complex. As you might expect, determining what level you operate at as an expert is complex, too.

We have already introduced you to the three high-level domains: the Relationship domain, the Value domain, and the Technical domain.

Each of these domains is comprised of the three capabilities, broad knowledge, and skill sets that describe how experts operate. These capabilities are shown in Figure 2.3

In the **RELATIONSHIP DOMAIN**, the three capabilities are:

- **Personal Impact:** the capability to influence people positively, being self-aware, empathetic and adaptive, and making individual and collective results happen.
- **Stakeholder Engagement:** the capability to build and maintain mutually rewarding stakeholder engagements across a variety of internal and external stakeholders.
- **Collaboration:** the capability to act as a valuable member of the team, whether virtual or co-located, and taking on an Expertship and/or leadership role when required or appropriate.

In the **VALUE DOMAIN**, the three capabilities are:

- **Market Context:** the capability to acquire, retain, refresh and leverage contextual organizational, competitive and customer knowledge effectively.
- **Value Impact:** the capability to identify, articulate and realize tangible ways of adding commercial or community value, demonstrating an active engagement in improving overall organizational performance.
- **Change Agility:** the capability to act as a change catalyst and lead change initiatives effectively.

*“The Nine Capabilities: Which do I need to work on the most, and why?”*

## Using the Capability Framework to Self-Assess

**BY WAY OF AN** example, one expert we worked with, Trevor, was, without doubt, operating at Master Expert level in two areas of the Expertship model.

When it came to the Expertship capability of Expert Knowledge (in the Technical domain), he had more knowledge, skills and experience in his domain, which was a specialized field of information technology, than most others in his field, and he was *applying* this knowledge strategically and innovatively on a daily basis. He was the go-to person for the enterprise, and no new technology projects were advanced without getting his input and advice. This is the mark of a Master Expert.

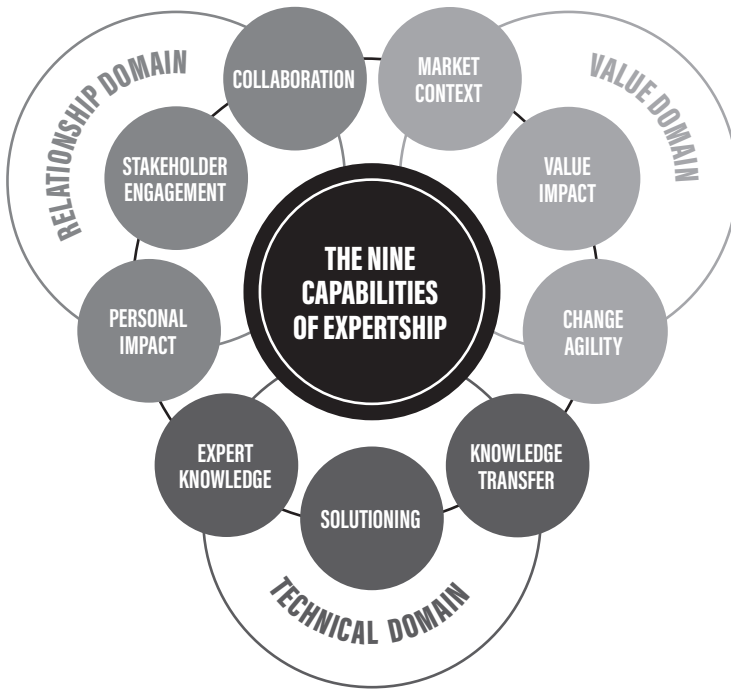


FIGURE 2.3: The Nine Capabilities of Expertship

The same could be said for the Expertship capability of Solutioning. Whenever there was a problem that was out of the ordinary or difficult to solve, Trevor was the person everyone went to for solutions. Similarly, when the business was trying to predict future challenges and problems, Trevor’s input into future solutions was sought out enthusiastically. Trevor was known for being able to see round corners when it came to anticipating potential problems with applications and infrastructure in the future. Surely a Master Expert.

While it appears Trevor is on track to be rated Master Expert, it turns out that things aren’t quite so rosy in the Relationship domain. Trevor took a close look at the behaviors described at Master Expert level under Stakeholder Engagement and identified that he operated only at the Expert level. He also noted that he was probably guilty of several derailers when it came to stakeholder engagement as he had poor external networks and could sometimes be “difficult to deal with.” He concluded that he was operating only at Specialist level when it came to the Stakeholder Engagement capability.

Trevor was, in many ways, quite typical of what we regularly see. In the past few years, we have conducted over one thousand 360-degree multi-

rater assessments using the Expertship model (the feedback tool is called *Expertship360*), and many of those assessed score strongly in the Technical domain capabilities, but less well in the Relationship domain capabilities. Typically, the lowest ratings are seen in the Market Context and Value Impact capabilities.

Trevor's example demonstrates that experts operate at different expert levels in different Expertship capabilities. Our overall rating is an average of all nine capabilities, and most of us need to be operating at Master Expert level in five or more capabilities to achieve the status of being a Master Expert, which is the very best expert we can be.

*“Many hundreds of experts have increased the value they add, thereby accelerating their careers quickly and effectively.”*

Interestingly, these results are independent of technical specialty (for example, IT or legal) and aren't typically affected by the industry (such as healthcare or financial services).

Until exposed to the Expertship model, most experts were unaware of the importance of the Market Context and Value Impact capabilities in ensuring they master their overall effectiveness as an expert. Without operating at a reasonably high level in these two capabilities, it's impossible to reach Master Expert level overall.

In each chapter that covers a specific Expertship capability, we offer you an opportunity to self-assess your level. In the final chapter of this book (Chapter 50), we describe how to build a Personal Growth Plan that helps you increase the level at which you operate, thus increasing your value to your organization and your marketability to other organizations.

This may sound complicated and a lot like hard work, but it really isn't. Many hundreds of experts have successfully navigated this path, quickly accelerating their careers and considerably boosting the value they add.

## The Structure of the Expertship Model

**EXPERTS WORK IN HIGHLY** complex environments, so you might expect the Expertship model to be reasonably complex as well.

We've already introduced you to the three domains of Expertship: Technical, Value and Relationship (Figure 2.1). We have also, in Figure 2.3 illustrated the nine associated capabilities, three each under each domain.

In order to help experts understand the precise behaviors required on the journey to mastery, the final level of granularity in the model is the expert

roles. In total, there are 27, and each capability has three of these expert roles. You'll see them listed in Figure 2.4 under the relevant capability.

In this book, 27 of the chapters are devoted to an in-depth look at each of these expert roles, focusing on their importance and the skills that are required to fulfill them. In each of these chapters, we list detailed actions that experts can take to build their mastery in these roles.

## Behaviors Set the Standard

**THE EXPERTSHIP MODEL IS** designed to provide experts with an objective assessment tool. When we first start working with experts, most tell us that very few conversations take place between themselves and their managers about levels of performance. Both the experts and their managers tell us they need a properly researched and validated guideline of what unsatisfactory (derailers), good (Expert level) and outstanding capabilities (Master Expert level) look like.

As you will see as you progress through this book, we're very specific about the core behaviors that are considered Expert level and those that are considered Master Expert. The model provides an objective assessment because the real test is binary. We can ask ourselves "Do I do this consistently, or not?" Phrases like "I'm quite good at this" are eliminated.

A prime example is Angela. She is an expert we worked with early in our Expertship journey. She worked in information technology teams. Angela considered herself a strong collaborator, but she reported ongoing frustration because despite her wanting to collaborate with others, they didn't seem to want to collaborate with her.

## The Expertship Model - A Roadmap for Masterexperts

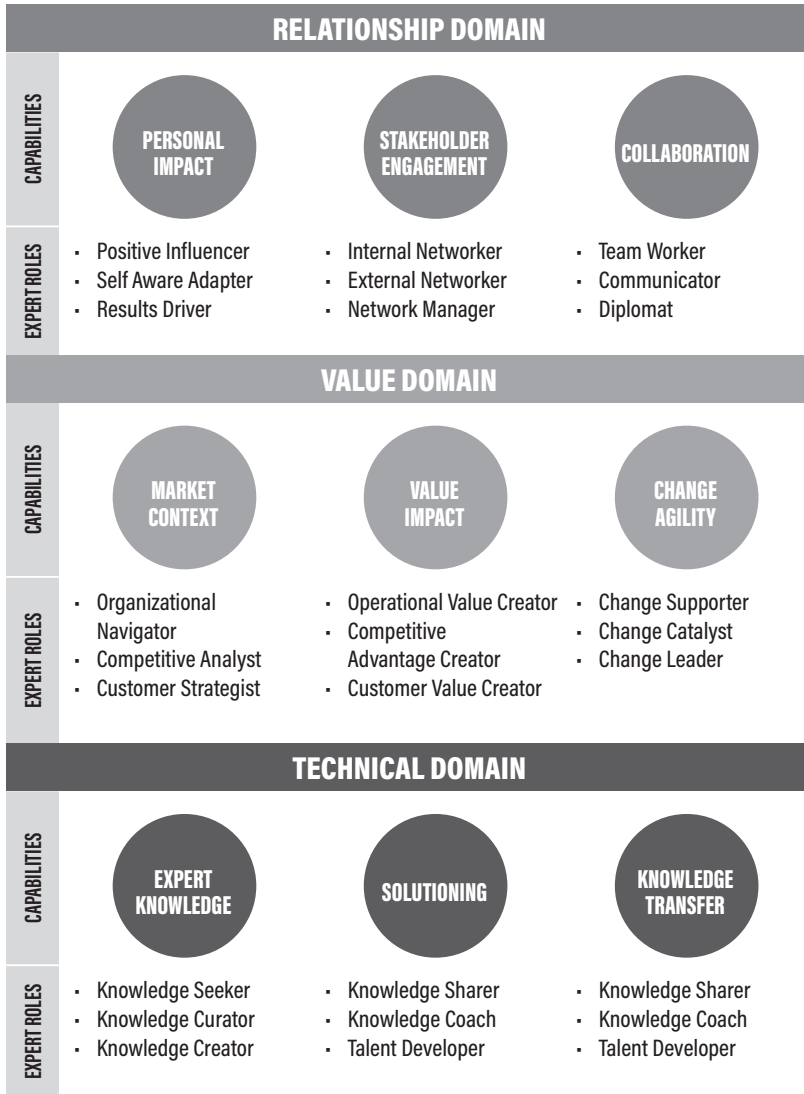


FIGURE 2.4: The 27 Expert Roles of Expertship



Angela decided to focus on the expert role of Communicator from the Collaboration capability. Angela examined the behaviors described at each level in the expert role (Chapter 24, *Next Level Communication*). We have reproduced the behavior chart in Figure 2.5. She concluded, as a self-assessment, that she was operating at the Expert level.

Angela recognized that she probably didn't listen to others as much as she could, and she certainly didn't use storytelling techniques. She also reflected that she probably used a quite directive and telling communication style in project meetings, rather than the consultative and inclusive communication style recommended in the behavior chart. Angela was also concerned that she was seen by others as opinionated and close-minded because she was clear about what she wanted everyone to do for her. This behavior was listed as a derailer in the model.

Angela had never previously seen behaviors listed as they are in the behavior chart, so she had not self-assessed against them. She had previously considered herself to be operating at a very high level as a communicator but could now see there were significant opportunities for her to master more advanced communication skills, which would make her a much more effective expert and colleague.

Working with her coach, Angela shaped a Personal Growth Plan to begin to address the issues her self-assessment had identified.

In each of the chapters that relate directly to an expert role, you'll see a behavior chart like the one above. This enables you to self-assess against the highest level of behavior, Master Expert, and then consider what actions you can take to reach that level. This book is designed to be actionable, so in each of these chapters, we make several suggestions as to things experts can do to build their skills in each of these roles.

We have also published a more detailed Expertship Growth Guide that lists more than 100 growth opportunities in far more detail than we're able to go into in this book. This publication is available for sale from our website, *expertship.com*.

In the next chapter, we'll provide some advice on how to quickly extract value from this book.

**Capability: COLLABORATION**  
**Expert Role: COMMUNICATOR**

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- Brings to life complex technical concepts/terms via compelling storytelling in accessible language.
  - Inspires and consults, promoting inclusive processes whereby everyone is heard.
  - In-demand presenter across the organization and externally due to their ability to combine technical and business concepts.
  - Advanced listening skills.
  - Embraces diversity of thought when discussing complex issues.
  - Communicates assertively, balancing courage with consideration.
- 



- Translates technical concepts/terms into practical and accessible language to increase others' comprehension.
  - Employs a variety of influencing techniques to gain commitment to ideas and plans.
  - Takes the lead in delivering effective presentations on behalf of function.
  - Good listening skills.
- 



- Communicates predominantly using technical language.
  - Uses rational and policy arguments when influencing technical groups; rarely consults with the wider organization.
  - Rarely takes the lead in technical presentations
- 

- Communicates almost exclusively using technical language/ jargon.
- Favors rational persuasion as primary influencing strategy.
- Comes across as closed-minded and opinionated, either by talking far more than listening or by being non-communicative.



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FIGURE 2.5: Detailed Behaviors for Communicators

## TAKING ACTION

# Growing Our Expertship

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**THINKING ABOUT EXPERTSHIP IN** general, here is a suggestion for an action you might wish to take to build your Expertship skills:

### ▶ ANALYZE THE BEST OF YOUR COLLEAGUES

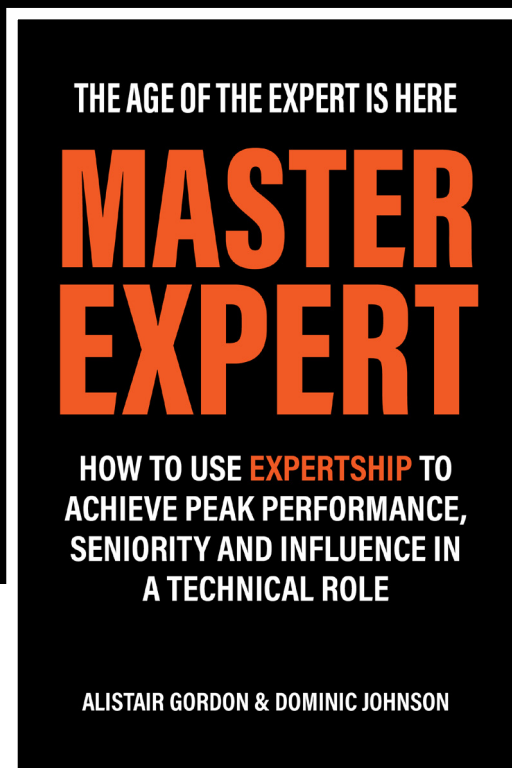
Most of us are lucky enough to have worked with experts who are exemplary professionals and have the respect of, and ability to influence, not just their technical peers but many senior non-technical colleagues across the organization. They are Master Experts. We might ask ourselves:

- How do they do it? What specific behaviors, skills, or even mindsets do these Master Experts deploy to achieve this impact and influence?
- What knowledge do they possess and leverage that I don't have?
- In which particular areas of the Expertship model do they excel? Which behaviors seem to have the most impact (particularly among our non-technical colleagues)?

This analysis can be extremely valuable if it's ongoing. Careful observation can help us discern what it is that these Master Experts do differently that we can learn from. The braver of those among us might even ask these Master Experts to mentor us.

# HOW TO BE A **MASTER EXPERT**

50 Chapters of techniques, ideas and skills to help technical specialists master relationships, business planning, risk and reward, CEOs and thought leadership.



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