

Technical Talent Assessment: The First Step in Developing Trusted Advisors

Why a Technical Talent Assessment?

For organizations offering complex services and solutions, no one has more impact on getting and keeping customers than the technical expert. Yet, although their specialized knowledge is highly prized, their potential value both to their customers and to their organization is often unrealized. What is needed is factual data about the existing capabilities of your technical talent, their realistic potential, and a systematic plan to improve performance. Not all people can achieve the status of trusted advisor, but all can increase their competencies to add more value to their customers and more value to your organization. The Technical Talent Assessment is the important cornerstone and building block of making that happen. For many organizations it is doubly important, as their expectations of their technical talent has changed dramatically over the past few years.

How Was this Assessment Developed?

The assessment is research-based (five studies, including the just-published *Transitioning Technical Experts into Trusted Advisors*) and field tested for over 15 years. The assessment is appropriate for all technical organizations that work with customers, but special value will be gained by those in business-to-business settings selling and delivering complex technology services and solutions.

Who Will Benefit from the Technical Talent Assessment?

All business leaders interested in generating profitable growth and enhancing customer loyalty through the interactions of their technical talent with customers will benefit from this assessment.

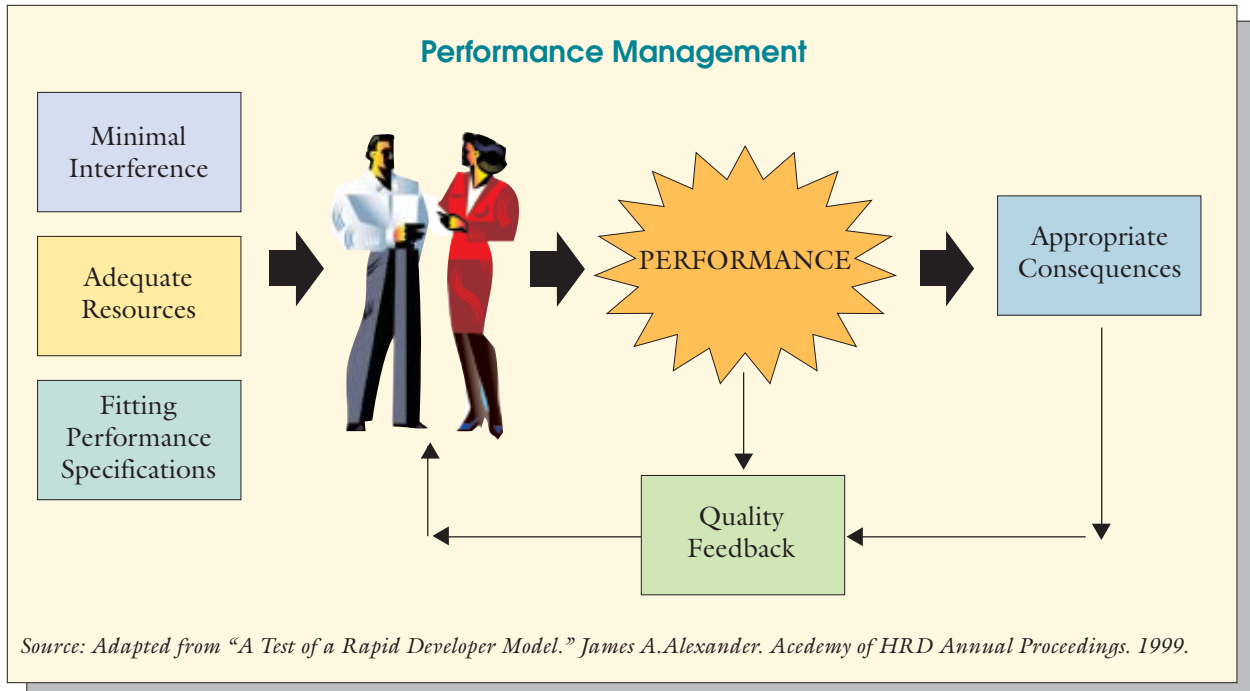
What Are the Deliverables?

Alexander Consulting will conduct an extensive assessment of 12 technical talent success levers. Each of the levers are given a 1-to-5 rating (see below) for current performance based upon a comparison of what was identified in the assessment versus industry benchmarks and best practices. Strengths are highlighted, opportunities for improvement are noted, and actionable recommendations are outlined for each success lever. The findings are presented to the client by the lead assessor in a two- to four-hour session.

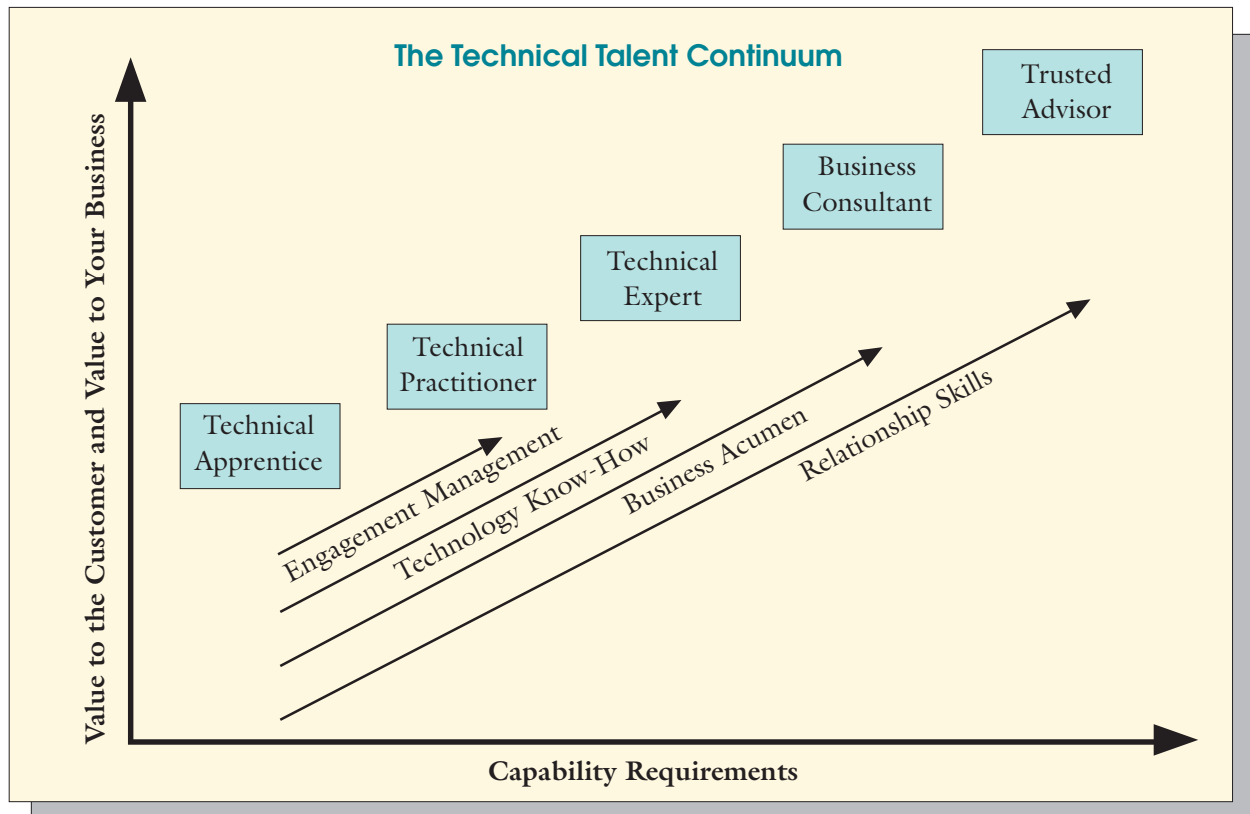
Assessment of Current Performance				
1	2	3	4	5
<i>Weak</i>				<i>Strong</i>

The 12 Success Levers

- I. Performance Management:
 1. Expectations
 2. Tools
 3. Metrics
 4. Consequences
 5. Feedback

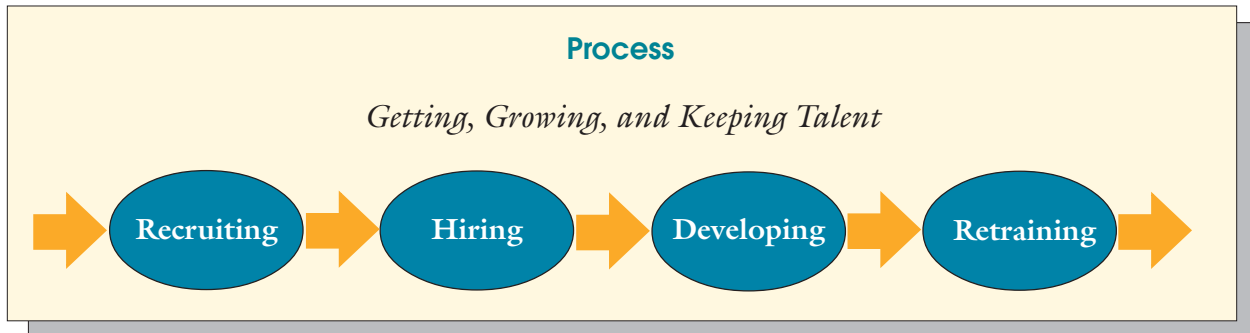


- II. Capabilities:
- 6. Knowledge
 - 7. Skills
 - 8. Mindset



III. Process:

- 9. Recruiting
- 10. Hiring
- 11. Developing
- 12. Retaining



How Does the Technical Talent Assessment Work?

Below are the steps, the benefits, and your options.

High-Level Technical Talent Assessment

Alexander Consulting will:

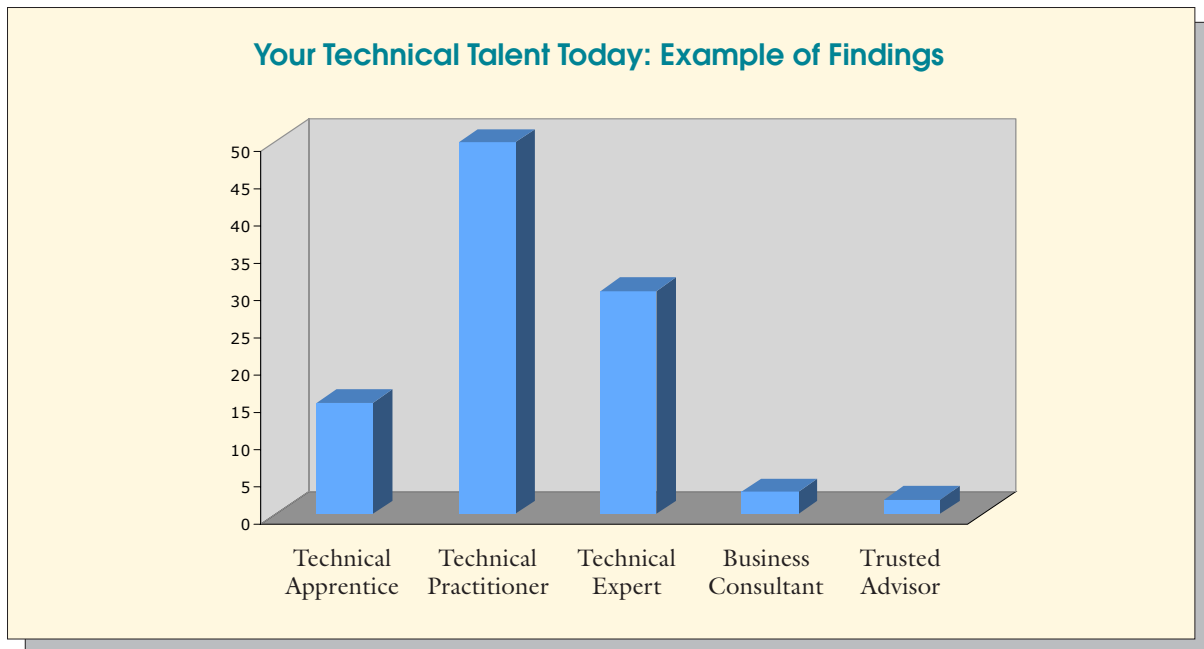
1. Review of all literature relevant to the assessment.
2. Interview the senior executive in charge via telephone.
3. Interview, plus electronic surveys, three managers via telephone.
4. Conduct a one-and-a-half-hour telephone focus group of star performers (plus surveys).
5. Conduct a one-hour telephone focus group of average performers (plus surveys).
6. Analyze information, determine findings, develop recommendations, and create report.
7. Report the findings and recommendations to the client in a two-hour telephone session.

Performance Management Expectations: Example of Findings

<p style="text-align: center;">Assessment of Current Performance</p> <table style="margin: auto; border: none;"> <tr> <td style="text-align: center;">1</td> <td style="text-align: center;">2</td> <td style="text-align: center;">3</td> <td style="text-align: center;">4</td> <td style="text-align: center;">5</td> </tr> <tr> <td style="text-align: center;"><i>Weak</i></td> <td></td> <td></td> <td></td> <td style="text-align: center;"><i>Strong</i></td> </tr> </table> <p style="margin-top: 10px;">Evidence</p> <div style="border: 1px solid black; padding: 5px; margin-bottom: 10px;"> <p>“Oh, yeah...we all know what our expectations are.” <i>SE</i></p> <p>“I want everyone in our company to do whatever they can to help grow the business.” <i>CEO presentation to services</i></p> <p>“I probably spend close to five days a month in pre-sales, yet I’m supposed to maintain 70% billability—that’s tough!” <i>Star SE</i></p> </div>	1	2	3	4	5	<i>Weak</i>				<i>Strong</i>	<p>Strengths</p> <ul style="list-style-type: none"> Clear expectations around important goals—billability, customer satisfaction, and contribution to the PSO. SEs have a say in setting goals. <p>Opportunities</p> <ul style="list-style-type: none"> Growth is both a company and a PSO mantra, yet there are no individual goals for SEs for business development. Billability targets are the same for all SEs regardless of capabilities, experience, or other expectations. <p>Recommendations</p> <ul style="list-style-type: none"> Establish a bench-line business development expectation for all consultants with more aggressive business development goals for your more capable people. Adjust billability downward for top performers who have high pre-sales and IP expectations.
1	2	3	4	5							
<i>Weak</i>				<i>Strong</i>							

Benefits

- Relevant—Focuses on the areas most important to technical talent success.
- Credible—Based upon solid research and years of experience.
- Actionable—Provides highly relevant information that can be put to use right away.
- Buy In—Because many key stakeholders are involved in the assessment, they will be likely to buy-in to the recommendations.
- Fast—Completed in three weeks (subject to scheduling).
- High Value—For a minimal investment, your organization will know where it stands regarding 12 success levers and what you can do to improve.
- Low Risk—Your satisfaction is guaranteed.



Options

Depending on your situation, you may want to consider adding another method or two in the data collection.

Voice of the Customer

If you want to validate your thinking with the actual perceptions of key customers, then having Alexander Consulting conduct 12 customer telephone interviews (six with customers of your stars and six with customers of your average performers) is an excellent addition to the High-Level Technical Talent Assessment. In these interviews customers explain their expectations of the technical talent they work with, their likes and dislikes of your technical talent, and they define what it is your people do (or don't do) that is important to them. Interviews are recorded and transcribed in the actual words of the customer to add additional power to the report. If this option is selected, the lead assessor will present the findings in a one-half-day, face-to-face session.

Field Observation

People don't always do what they say they do. When this option is selected, the assessor (knowledgeable of the technology industry, experienced in working with technical experts, and trained in behavior observation) will spend four days in the field with both top performers and average performers to truly understand how they perform their job. He will ask them what they are going to do and watch them in action with clients and others. Afterward, he will ask them why they did what they did. During this time, the assessor will observe the stars use or non-use of the knowledge, skills, mindsets, and tools known to be important competencies of top technology consultants (trusted advisors). The assessor will then compare these observations with a trusted-advisor checklist of capabilities and score your people against these criteria. The results become a benchmark of the current performance versus an industry standard with which to develop training and development efforts. If this option is selected, the lead assessor will present the findings in a one-half-day, face-to-face session.

How Do I Get Started?

Contact Jim Alexander at 239-283-7400 or alex@alexanderstrategists.com to see if a technical talent assessment is right for you.

About the Lead Assessor

James A. Alexander, Ed.D. is the founder of Alexander Consulting, a management consultancy that helps product companies create and implement professional services strategies. He researches, publishes, trains, and speaks on the critical issues services leaders face.



Jim has authored or co-authored over 80 articles, three white papers, five research reports, and two books and has taught at universities in the U.S., Europe, and Mexico.

Jim was selected as the services pundit for IBM Global Services 2003 Headlights Program. Furthermore, he served as the U.S. Department of Commerce's e-business subject-matter expert for its Inter-American E-Business Fellowship Program.

Finally, Jim is a trusted advisor and executive coach to many senior executives of leading services organizations, helping them navigate the journey from business-as-usual to business-as-exceptional.

About Alexander Consulting

Alexander Consulting helps product companies create and implement professional services strategies. Services include research, consulting, training, and speaking on the critical issues of the services industry. Areas of strength include market research, strategy formulation, marketing direction, sales effectiveness, and talent productivity. For more information, e-mail ac@alexanderstrategists.com or visit www.alexanderstrategists.com.