

Transitioning from Technical Experts to Become Trusted Business Advisors:

What You Have to do to Become Successful?

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Note: Although this article references technology specialists, a trusted business advisor is anyone who actively engages in various aspects of services selling and delivery (consultants, systems and design engineers, field service, sales, account and customer relationship managers and support functions). All of these professionals have a responsibility to “build trust” with clients, possess business acumen and be highly focused on delivering client value in every interaction, regardless of the life cycle of an engagement.

With today’s exploding technology (wireless, iPods, mobile content management, mega storage, everything digital), it’s hard for professional services firms not to focus on obtaining all the best technical talent they can get their hands on. But is this enough? The answer is no. This is because some things in business have stayed the same for centuries: Business is still all about relationships and building client trust. How many times have your highly talented technical experts’ recommendations fallen on deaf ears? How often have they ignored your advice, argued their own fixed point of view to their ultimate detriment and then blamed you for the failure? Sound familiar?

Transitioning your technical resource experts into trusted business advisors can be accomplished with relative ease if you focus on the right things, prepare well and equip your technical specialists with the skills, knowledge, competence and confidence to excel in four specific areas of business consulting performance. *Figure 1* shows the four consulting capabilities that all subject matter experts must possess.

1: technical expertise

Too often, we assume that our subject matter experts have all the information they need to be successful with clients. This may appear to be true due to their educational training, in-house technology orientations and experience within your own company and other organizations. However, ongoing professional development for technical experts that takes into account new releases of software, emerging new services and technology breakthroughs needs to be in place and tied to an overall training plan for each person. The pressure to stay in demand (a common measure for technical experts in the 60 to 80 percent range) often leads to postponing ongoing training.

The natural result is that often the client knows more about the new releases or services than the consultant, because they recently went to a training session on the new product or service and now can ask really difficult questions that frequently the technical expert cannot answer — good bye credibility!

Bottom line: Never send your technical experts into the field without making sure they are smarter than the client related to new technology and its service applications. Even requiring some level of testing and certification keeps the bar at a high level. If your intellectual and human capital talent is not “leading and bleeding edge,” what do you really have left to sell a buyer of professional services? Nothing, except a product that they cannot get help with when they need it — a formula for low client satisfaction, lost loyalty and poor credibility.

2: relationship skills

Consulting is a “relationship business.” No way around it, your technical experts have to possess strong relationship skills. Building these skills often feels quite foreign to them, as their training in college and even on the job mostly focuses on technical areas of development. Yes, they may have taken one or two courses in psychology, but the main focus is on technology, not people. This is also true for lawyers and even graduates of some MBA programs that focus on finance, strategy or marketing. A “trusted advisor” is valued for the soundness of his or her expertise but also on how information is presented and the effectiveness of the relationship over time.

Clients often say to themselves, “Can I trust this person?” “Can I relate to this person?” “Is this person talking at me or to me?” “Does this person really understand the challenges I’m up against?” “Has she or he ever walked a mile in my shoes?” “Does this person have my best interest at heart? Or is the person only interested in telling me how smart he or she is and how dumb I am?”

Recently, a technology consultant contacted us inquiring as to opportunities with our firm. In the course of the conversation, we asked about his current project experience and the type of relationships he had with executives. We were kind of surprised when he said, “The thing I hate most about my current job is the fact that I have to work with clients! I really wish they could just lock me in a room and let me do my thing and fix things up and just send them the results. The less people contact the better!” Needless to say, we didn’t think he was a good fit with our organization.

Bottom line: In order to create the right kind of mind-set built upon trust and relationship building, educate your technical experts in at least these eight relationship skills:

1. Be an active listener. Ask open-ended questions and know how to paraphrase so you can use verbal and nonverbal signals to engage clients.
2. Know how to respond to different client personalities. Understanding your own personal style is important, but knowing how to flex your style to meet clients on their ground is essential. We never met a client that flexed a certain style to us; that was always our responsibility.
3. Learn to communicate the invisible. Service experts are great when it comes to talking about features and technical specifications but weak when they have to convert facts into feelings through the use of analogies and stories. Service technical consulting is a high-touch business, so you have to know how to make the invisible visible through painting a picture that the client can see and feel.
4. Manage conflict. Conflict is not always a bad thing; in fact, in many situations, it’s a very positive thing. New ideas emerge, points of view are exposed, and new and creative ways to solve problems surface. A trusted advisor knows how to turn negative conflict into a positive experience through focusing on areas of agreement and acknowledging feelings and facts with terms to which the client can relate.
5. Be aware of the other person’s environment. It’s best to follow a structured process of building a relationship based on your understanding of decorum, aspects of commonality, expressions of empathy, ways to establish credibility, discussions of value and trust-based statements such as, “I’m here to help you become successful” and “We guarantee that we will do what we say we are going to do.” These all help the trust-building experience.

6. Learn negotiation skills. Set the stage for an effective negotiation and understand the various methods to negotiate and you can be quite beneficial in establishing the kind of business and trusting relationship you desire with a client. Negotiation skill building requires practice, as the skills involved are a combination of verbal and nonverbal behavioral techniques.
7. Understand how people experience change. If you don't manage change, change will manage you! Learning the fundamentals of change management can go a long way in establishing trust with a client. Since clients like predictability, you must learn how change will impact them and their organization, how best to address internal resistance and the best ways to address change assimilation, among other few skills.
8. Know how to communicate value. Value is a tricky concept to grasp, as we all have different opinions related to what it means. Some say, "Value is what the client says it is." Regardless of the definition, technical experts need to understand how to communicate technical information from a value perspective. This takes practice in articulating complex information into easy-to-understand "value statements" such as, "When the technical integration is complete, everyone will find all the information they need in one place quickly with minimum hassle. Sound good to you?"

3: engagement management

Engagement management means all your technical specialists understand your processes and follow them without exception. Every organization needs a common methodology so that everyone who interacts with a client is well versed in your implementation and task packages. Technical experts sometimes deviate from an established engagement management process to meet hot issues or unique client situations. This might be necessary, but without some monitoring mechanisms in place, the exception soon becomes the rule.

Bottom line: Create an engagement management process that is user friendly, easy to monitor and that everyone follows. Constantly keep your focus on finding new ways to make it more efficient and effective. Here the golden rule is: Consistency in delivery and predictability yield the promised results.

4: business acumen

Business acumen is the ability to not only act and behave like a professional, but to be knowledgeable in business fundamentals. Some straightforward questions for your technical experts can bring this concept to light:

- Are you familiar with my industry?
- Do you possess in-depth knowledge of my particular business?
- Can you share with me best practices and lessons learned from similar engagements?
- Are you knowledgeable about different organizational models that might work for me?
- Have you ever worked in any functional area other than technology such as marketing, sales, finance, supply chain, customer relations, etc.?
- Can you talk about the strategic issues facing my industry?
- Do you have knowledge of what's on my Website?
- Are you familiar with my competitors?
- Can you understand the difference between terms like profit, margin, P& L, ROA, ROI, market share, etc.?
- Can you educate me on change management effects and how best I can manage the change?
- Is your expertise deep enough to move from strategy to specific actions?

- Can you help me understand your services better so I can use them more effectively?
- Do you offer a service guarantee?
- Did you see the article in the Wall Street Journal (WSJ) yesterday about my company? What do you think the impact will be on our customers and investors? (Hopefully their answer would not be something like, “I don’t read the WSJ because as technical experts its not part of the information we are required to keep up with!”)

Bottom line: The higher up you go in a services organization, the more important business acumen skills become. The ultimate question to ask your technical experts is: How can they increase their business acumen? Some ways you can help them is to require them to read leading business journals (like the WSJ and the Economist), attend a change management seminar, present at industry conferences, review competitor and client Websites and attend internal meetings in your organization that teach financial fundamentals. There are also many other ways they can get a more real-time approach to business, rather than just within a single, functional area of expertise.

Lastly, training the technical specialist on the “nuts and bolts” of how to create client development opportunities (code words for “how to sell professional services”) can give your technical experts more personal power in the client relationship. Even field services and support professionals can learn the fundamentals of up-selling without ever coming across as hard-core salesmen.

From technical expert to trusted advisor

When you position your technical experts as business consultants and trusted advisors, all kinds of new positive possibilities emerge and flow from that experience. Change is never easy. But the process of creating a transition from technical expert to trusted business advisor can be achieved, provided you make it a business priority, focus on the right skill areas and provide the support and coaching to keep it part of your ongoing overall professional development initiatives. The outcome will be more satisfied clients, better consulting experiences and personal satisfaction — a winning combination that will sustain the test of time.

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