



## Turning Technical Experts into Trusted Advisors

By James A. Alexander, Ed.D, Founder, Alexander Consulting

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. For technical experts to become true trusted advisors they need a shift in mindset, an expansion of role, and advanced knowledge and skills. For the vast majority of technical experts, this is a very doable, very rewarding transformation.

### A Critical Topic for Services Leaders

In my recently-published study, *Transitioning Technical Experts into Trusted Advisors*, I focused on talent management perspectives from eighty different services executives from around the globe. These participants were eager to share their thoughts on the “trusted advisor” role with unique slants; from how trusted advisors aid their competitive advantage, to how they enable business development and customer satisfaction.

### Select Quotes from the Study-

“Our lifeblood depends on the technical capabilities of our top personnel to differentiate our company from others in the industry. They understand our customers’ issues and are creative in developing solutions to address them. They have become evangelists for our products and solutions and are often used in pre-sales situations to demonstrate our capabilities.”

– *Senior services executive from North America*

“Proper use of your frontline technical resources (e.g., the trusted advisor role) is paramount both to building your business and to best serving your customers’ needs.” – *Services leader running a global product-support practice*

“Frequently, the customer doesn’t know that we can help him with some other problem he is dealing with. By recognizing and capitalizing on these opportunities, it creates a win-win situation: the customer wins by having their needs served, and we win by building our business and achieving revenue goals.” – *Services manager from Europe*

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“Encouraging your team to become your customers’ trusted advisor is a great way to develop both your customer base and your team. By empowering team members to take a more active role in the success of the customer, they gain a sense of ownership and accountability. The customer also receives better service and feels better about his relationship with your company.” – *Services executive from North America*

“My ability to transform my organization from being reactive to being thought leaders and being specialization-based will make or break my career. I am passionate about this subject.”  
– *Services VP*

Obviously this is a topic of significance to services leaders across the technology industry.

### **Trusted Advisors are Rare**

Although their value is well accepted and sought after, participants in this study admitted that there are only a small number of people who currently fill that role. Here are some comments from our services executive research participants who confirm this rarity:

“The combination of technical background with business acumen is a very sought-after combination.”

“I think the rarest person you find in software is the pure technical person who is credible and effective in sales. If you have one, they are golden.”

“In every company, even small ones, you have people who have the qualities we talked about. They are a golden nugget lying in the field. Utilize them because they are invaluable inside and also the people who will help with the customer relationships.”

### **The Technical Talent Continuum**

Although there are significant challenges with this transformation, it is in fact doable. Listed below are a few participant comments that confirm that sentiment:

“It is quite difficult to find these types of guys, but when you get one who can communicate, it is really important in building the business. Other people within delivery have the opportunity to become trusted advisors.”

“I already have a few folks acting in this role, so other people can see what it looks like.”

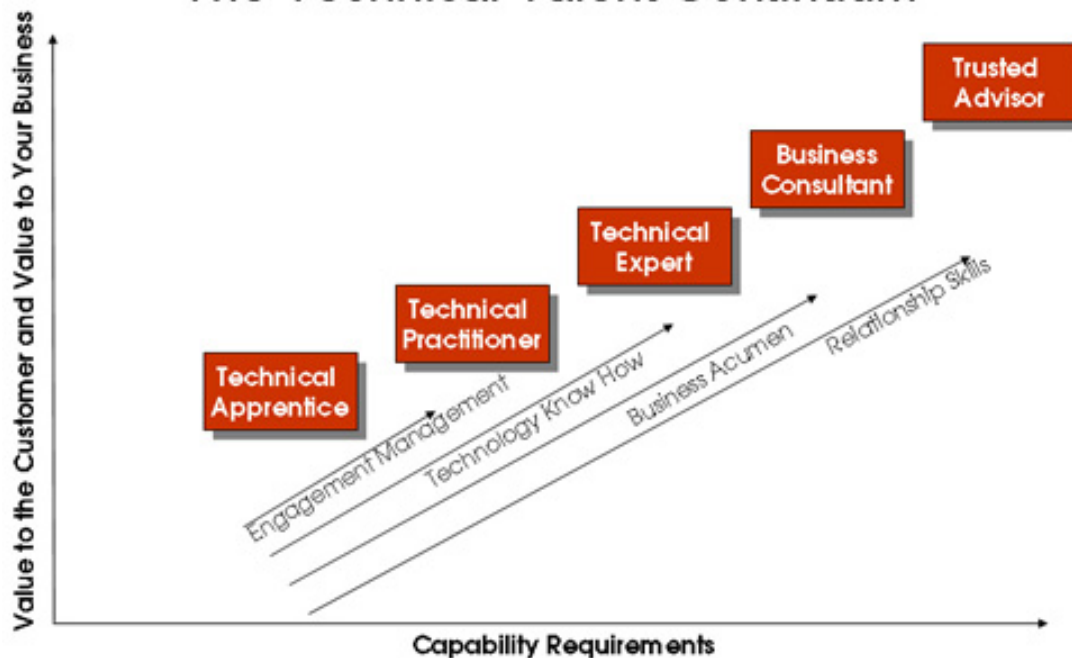
“Our field engineers make one million customer calls per year—we can maximize this opportunity...becoming a trusted advisor is very valid for some, but almost all can move along the value continuum to become trusted

supporters, helping our customers and helping us grow.”

Most likely, only a small number of your people are seen by your customers as trusted advisors. In addition, there are probably only a certain number of your people who have the capacity and the desire to achieve this level. However, that doesn't mean that the vast majority of your people can't add more value to their customers and your company by increasing the capabilities in the areas that have the most impact. The Technical Talent Continuum, shown in *Figure 1* below, is a way for both you and your technical experts to better understand their current capabilities and value potential.

Figure 1

## The Technical Talent Continuum



Each of these five roles represents a point on the continuum. The further one goes to the right, the more potential value one has to the customer and to the services organization. Each role builds upon the capabilities of earlier roles, adding on new knowledge, skills, and mindset requirements in order to effectively meet the expectations of the role.

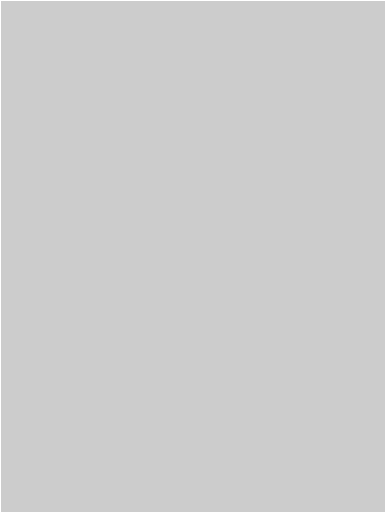
For example, someone fresh out of school would start as a technical apprentice, focusing on the technology and product knowledge required to achieve enough competence to eventually become a technical practitioner. At this stage, acquiring business acumen and learning business development skills are not the priority—that will come later as proficiency develops and expectations are increased.

Use the model to help you flesh out the specific capabilities and the desired competency for each role in the continuum, and then plot your people accordingly. As you also will notice, this continuum can be a very important tool in hiring and developing as well as in determining compensation and

career pathing. If you can increase the trusted advisor capabilities of your technical people just 10 percent, you can have a very big impact on your services business.

**About Jim Alexander**.....

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