

Picking Technical Experts

10/10/05

This week's question comes from the owner of an on-line educational business, where staying ahead of the curve is crucial. We were having a conversation about the experience level of the people he relies on to help him deliver his products and services. We focused on the following group of questions.

When it comes to running my business well, who should be my technical experts? What do they know and how do I decide if they know enough? How do I figure out what my technical experts will need to know in the future, and by when?

Every business has, needs, and can benefit from technical experts. No one or two people can know everything the business needs to know. Knowledge specialists can contribute to the business' growth and development, and protect the business from common mistakes. Every area of the business can benefit from specialization, to some degree. In the rest of this article, we'll focus on the steps one business owner took to solve this question in one area of his business. *Think about how prepared your business is to leap forward, will skill and confidence, as you read on.*

We started with the core functions of the business – the products or services the company delivers; in this owner's case, on-

line educational services. We picked four areas, operations, finance, sales, and human resources, to evaluate. The rest of this article describes the steps the owner went through in operations, to find his technical experts. In order to figure out who was, or might need to be technical experts in operations, *we focused on what the company has to do extremely well, all the time, in the delivery of its services.*

Our owner felt the company must do 4 things well in its operations. It must have friendly, informative customer service, and be able to support end users immediately upon request. The company must deliver accurate information in its training programs. Lessons – the on-line training service - must be easy to use. And the company must be able to verify that the user is better off – or in this case more knowledgeable – after using the service. *What 4 things does your company have to do extremely well?*

In each of these 4 areas, we next talked about *who is, or could become, the company's technical experts.* Our owner felt that customer service, at present, is not as strong as it could be. He felt he needed one person in charge, with a clear set of standards. Our owner felt he had someone who could be his technical expert in customer service, but that person needed training, because customer

service, overall needed to be strengthened. We discussed a variety of on-the-job training options, and settled on sending the candidate to a series of training classes on customer service. *In what areas of your business would additional employee training result in improved services?*

His technical offer worked well, he felt. His training programs were accurate in the information they supplied and the lessons were easy to use. He felt he had a person in charge who understood the programs. He decided to focus on the future, by starting looking for an outside source to support the growth and development of the programs over the next 5 years. To do that, he asked his technical expert to pick 3 suppliers to interview and to develop set of questions they could ask those firms, to find out what the firms were doing to prepare for the future. He and his technical expert, together, interviewed all three firms, then selected one firm that they believed could lead them forward. They negotiated a contract for that firm to start supplying a few hours / month of advice on how they could get where they wanted to go. *Which areas of your business are in okay shape today, but may need more knowledge in the future?*

The final question, verifying if the user is better off, our owner felt was a marketing question. He

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had no one on staff specifically assigned to marketing, other than himself. He felt this was a big gap, as he needed independent advice, and more research than he could do alone. He decided he needed to fill this gap within the year. He started on his search by calling several business owners he thought had done a good job of assessing and responding to customer reactions. He asked them how they went about doing their assessments, and whether they had someone inside the firm, or outside, working on it. The general advice he heard was, start with outsiders. As time goes on, build a department inside the company, as the workload increases and you better understand what needs to be done. Work with outsiders who want to teach you, and help you to build process, so that in the future you can replicate what they do inside the company. *What part of your business would benefit from a technical expert, where none exists today?*

Finally, the owner decided on four outcomes, that he wanted everyone one of his new technical experts – employees and vendors – to focus on addressing. How quickly would someone respond to a customer request? What would be the escalation steps in case a complex problem surfaced? How questions and answers would be documented and shared with other customers? What kind of follow up would take place, after

the fact, to insure the customer was satisfied?

Finally, to get things rolling, our owner announced that he had formed a team of operations technical experts, made up of a combination of employees and vendors. He shared his four goals, and four outcomes, with everyone. He asked the team to get together, discuss how they would work individually and together, to deliver on those goals and outcomes. He set a meeting date a month out, for the group to get back to him with its initial findings and recommendations. *How would you go about announcing a new initiative in your company?*

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