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# How to recognize an expert?

*In the modern world, we need people to consult in decision making and planning and in training of others, who are the best experts in their field needed. The “bestness” here means that the expert's contribution can be trusted and that it will be the most advantageous advice available. But what to do when everyone is in her mind such a person? This paper presents some viewpoints to an informal evaluation of expert prospects.*

## Table of contents

- Context: advice to the adapting new ideas – but no issue is an island ..... 1
- Points which are taken into consideration ..... 2
  - Experience and time perspective ..... 3
  - Conceptual models and multiple truths ..... 3
  - Profiling to a way of working and ideas ..... 3
  - Knowing the context..... 4
  - Reasoning for claims ..... 4
  - Presenting the limitations of idea X ..... 4
  - Mystification and hiding of facts ..... 4
  - Profiling to some level of competence or maturity level ..... 4
  - Integrity of the professionalism ..... 5
  - Transfer of the know-how from another context ..... 5
  - Has all been told? ..... 5
  - Reputation ..... 5
  - Whose bread do you eat..... 5
  - Customer orientation..... 5
- Finally ..... 5

## Introduction

When new paradigms and ideas are introduced to our environment, the best way to utilise and implement them is not obvious. For example, there are many contradictory views about agile development and software testing. In the 1990's the best ways of the assuring usability of applications had to be thought about. And the constant situation is the selling of new solutions to conference audiences. A practical question is then: **who can be trusted when there is no reliable evidence from, for example, research or from experiences? Who can we afford to believe?**

I have myself have had to think about the reliability of the different experts in, among others, these situations, and as a consultant have had to think about my own reliability and about its limitations. I believe that most of them get into similar situations and then, it is nice if one has thought about the matter and can argue from it at least to himself.

In the following chapters, I will present some issues, thinking about which an “expert prospect” can perhaps be fitted in the right position in the field of expertise and one can argue the reasons for the positioning at least to oneself. And when understanding the profile of an expert, we can better utilise what she has to offer.

It is worthwhile to consider this text as an incomplete checklist. It makes things a little too simplified by not differentiating various expert roles, which might have different settings and criteria.

## Context: advice to the adapting new ideas – but no issue is an island

Challenges:

- 1) How to apply thing X to a real, goal-oriented activity in “industrial” context?
- 2) How to solve come problem in a real, goal-oriented activity in “industrial” context??

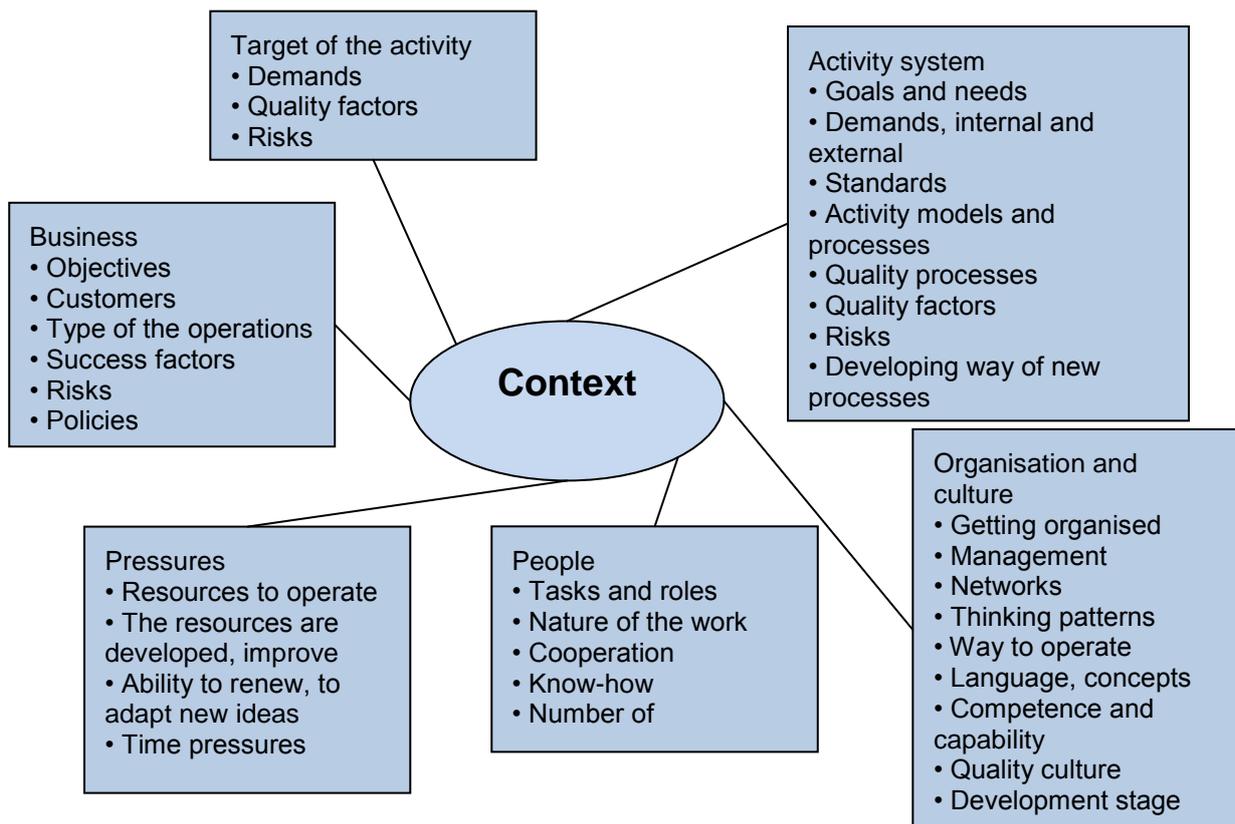
The situation often is that a new thing should be done and the ways to do it are sought. It is essential to identify the demands to the way of application, so that the best way can be found and a non-optimal way is not forged to the context.

For example the knowhow acquired in education or training is just a collection of too premature ideas that do not fit real life without adaptation. The same holds true for, e.g. any given new hype brought from the world, which are done to improve the business of some party (a book author's, a consultant's, researcher's, trainer's ...).

It can be that the ideas do not apply to the context at all or that they have weaknesses or limitations. Usually, the new ideas need to be brought in as part of a higher level process in the activity system. Likewise, they must be integrated as part of the culture, thinking patterns and language. Management processes and quality processes must be added to them. Their input and outputs must be tailored.

A problem will come from the fact that modern activity in organization is usually quite complex. The more advanced the activity is, the more complex it usually is it (even though one might not notice it). But that complexity is not visible in simple process schemes in which case one can imagine that it does not exist at all. But it does – in the culture, in the thinking patterns, in tacit knowledge, in the smooth collaboration developed by shared history.

All this is the people's work and happens based on other people's advice, if expert consulting is utilised. In this text, we seek for grounds for understanding whose advice is worth listening to.



*The new ideas are adapted and the needs are met in some kind of context (N.B.: such schemes can be drawn up of the situation in very different ways; this should not be considered as a comprehensive general scheme)*

## Points which are taken into consideration

*The following sections contain some characteristics in a consultant's etc. behaviour to be assessed. Do not assume the list to be comprehensive.*

## Experience and time perspective

- Experience in the matter at hand and on the side of the matter. It is surprising is how there can be people who have about twenty year of experience of “expert” work without the decent understanding of the work.
- Is familiar with the history and trajectories of the domain and the issues at hands. To be able to lead progress, one should know where we are coming from.
- The expert has had a life before the last craze. By jumping to the sledge of the hype, only traders are born, not real experts.
- Management experience of course does mean substance know-how even though the leaders “are” always “naturally” experts of the thing that is managed.

## Conceptual models and multiple truths

- Has various explanation models for a phenomen. A large “vocabulary” of explatation model is a sign of good understanding.
- Knows the theories – already from the first days of the history of the issues. The world of an expert was not created five years ago.
- Does she represent a school of thought? Can she herself position her thinking? Various schools are always right about some things and wrong in some other things. What school do you, the reader, represent?
- Who is the expert's guru? If the expert only repeats one master's thoughts, her whole thinking is not sufficient and her views are not neutral.
- Can the expert even identify other thinking patterns than hers? Notice: scientific researchers must sometimes close their eyes from things that in the context of science do not fit in their thinking context... but your reality does not work like that.
- Does he acknowledge the existence of other areas of expertise? Sensible experts nowadays understand that the things in the world are so complex that they cannot be understood only from one viewpoint. And every point of view develops all the time! The time has passed when from a software development models could be developed from the software developer's perspective only.



*Having multiple viewpoints is essential in the world of 2000's*

## Profiling to a way of working and ideas

One should think how the expert positions for example in the following dimensions that strongly influence the basis of all her proposals – the suppositions, knowledge and the applicability of the advice:

- Theoretician <> pragmatist.
- Researcher <> salesperson.
- Emphasises processes, techniques <> Emphasises people.
- Substance consultation <> process consultation.
- Comprehensiveness <> developing of one issue.
- Reformer <> stabiliser of good practices.
- Supporter of universal best practices <> bases improvements on the needs and possibilities for the context.
- Systematic <> operates in agile and intuitive manner.
- Seeks security <> risk taker (and it is *your* risk).
- Rides the wave <> conservative.
- Prefers complexity <> simplifier.
- Hiding <> open.
- New expert <> a veteran in the field.
- In role <> is herself.

- Sure <> uncertain.

### Knowing the context

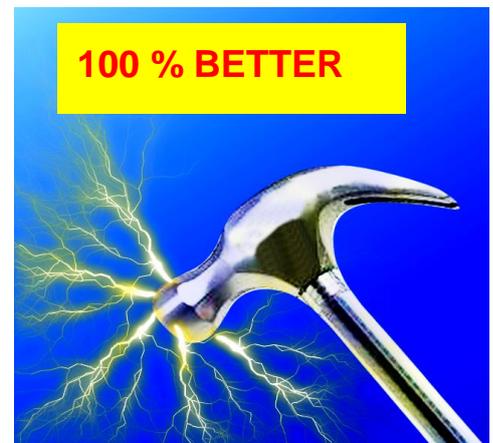
- What is the expert's context? The activity systems are always things with many truths and viewpoint. From which viewpoint does the expert look at things? Does she acknowledge the existence of other viewpoints?
- Understanding about the goals of the domain and business.
- Is the expert familiar with the environment she is consulting in? For example, consulting about the lifecycle model of software development is problematic without understanding the current (cultural) habits of the domain.
- Language is important: if terminology is very different, people end up talking about different things or the same thing with different concepts. The expert must know how to speak language of the organisation it to be advised.

### Reasoning for claims

- Is there at least some rationale to support the expert's claims? The sales statements are not a solid rationale.
- Does she identify open questions and challenges in her points of view?
- If the rationale is based on "name dropping" without facts ("I discussed this with professor NN") as or a proof is the number of conference presentations (rather than substance of those), the alarm bells should ring.

### Presenting the limitations of idea X

- To what goals and needs is X suitable for? Does the expert propose his idea to every situation? No solution is ever the best everywhere. A good expert says "no" sufficiently often: no, this is not the best thing to do in that situation.
- Does she take into consideration the maturity of the existing activity?
- Need to add something. Some method descriptions include information on how they should be supplemented with other things in real life – but of course the consultants want to apply them as they are...
- Risks and their management. There are risks in all the things, in all approaches, methods and activity models. The expert must know them too.
- Necessary quality assurance activities. The basic textbook methods are usually clean, and they must be supplemented with quality assurance tasks – at least with inspections or similar.
- At the same time, the ideas must be integrated with higher level quality and development frameworks. How would, for example, a new product development idea fit the world of ISO 9001 or CMMI?



*When the only tool is a hammer, all the problems will look like nails*

### Mystification and hiding of facts

- A pig should not be bought in a sack, no matter how good the pig-selling expert says it is.
- It must be possible to open the proposed methods for examination. Too often even the results of a scientific study are hidden in a black box and they should be bought on the basis of a nice sounding three-letter name.

"My method XYZ is unique. It has been described, of course, in my public doctoral thesis which I do not give you to read (you may find a copy in university X's library). I will tell in more detail when you order my training course."

### Profiling to some level of competence or maturity level

- The experts' role varies from a development consultant to an expert of some packaged method. Especially the latter are always suitable for only some target organisations of a certain maturity and other require more critical thinking to apply. What is the implicit maturity level in which this expert operates?

### Integrity of the professionalism

- Professionalism is comprehensive and all of its areas must be in good shape. In addition to skills and knowledge, essential issues are for example: attitude, relation to the ones to be advised, dependability, ethics.

### Transfer of the know-how from another context

- For example, the different planning professions can look analogous in different domains and sometimes they indeed are it. However, their approach to the substance can be sometimes very different even in a critical way.



### Has all been told?

- The general problem which is related to knowing is that one imagines that others also know the same basic things. And therefore one does not notice a need to tell them.
- "Unconsultative" experts sometimes have a danger to fall into this trap hole. It is also the customer's responsibility to ask about the basis of the ideas and what are the things associated with it – for example risky suppositions..

### Reputation

- What do other people think of the expert?
- What do the people you respect think of her?

### Whose bread do you eat

- Are there direct commercial linkages? People propose things that they earn money from.
- The expert should have her own texts, own documented thinking and not just repeat others' opinions. And besides, one is supposed to learn best by writing.

### Customer orientation

- When all is said and done... does the expert have the customer's benefit in mind, or just her own?



*Good and bad advice have their effects*

### Finally

This is only an introduction to the matter of assessing experts. This theme will become concrete when one thinks about the matters in some context – and that is for you, the reader, to do! Think about what the expertise means in your context – what things are associated in good and bad consulting and what things one should be wary about.