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# Moving From a Technical Role to a Leadership Role – Making the Essential Transition to Leadership

by PAUL HEACOCK

The IASA membership is largely comprised of “technical people”. Technical people are accountants, actuaries, programmers, systems engineers, etc. These professionals originally qualified for their jobs predominantly because of their specialized technical skills. IASA offered a career skills program intended to help technical people make the best possible transition from an individual contributor role to a leadership role, titled “Making the Transition to Leadership” at the recent 2014 IASA National conference. One of the key takeaways from this program was that technical people in, or moving to, a leadership role must realize the characteristics and skills which helped them succeed in a technical role may significantly hinder their chances for maximum success as a leader.

In order to succeed as a leader a technical person has to “give up” important things to fully enter a leadership role. They will also need to balance their appreciation and application of technical, interpersonal and administrative skills to be an effective leader.

As part of the “Making the Transition to Leadership” program we asked the attendees: What do you love about your job as a technical person? Typical answers to this question included the following:

- Direct involvement in problem solving
- Clear role definition
- Measurement of worth based solely on professional competence
- Control over personal development
- Being insulated from organizational politics
- Being on the “cutting edge”
- Task completion–closure

We subsequently asked: What are/were the payoffs for

“*Technical people in, or moving to, a leadership role must realize the characteristics and skills which helped them succeed in a technical role may significantly hinder their chances for maximum success as a leader.*”

going into leadership? Typical answers to this questions included:

- Additional money, chance for financial security
- An element of autonomy, chance to be in charge
- Ability to amplify my efforts
- Personal growth opportunities
- Inside knowledge
- Increased visibility
- More control

The final question asked was then: Are the payoffs gained

from being a leader enough to offset what you gave up from your prior technical role?

Technical people who think they have gained enough and truly value the gains of being in a leadership role are more likely to experience a smooth transition into a leadership role. In going into leadership, or in fully embracing leadership, we may leave some of the things we love and transitioning to other things that are different and perhaps

transition from a technical role to a leadership role, a technical person must begin anew by moving from a narrow technical emphasis to a more general leadership emphasis. Specific examples of needed changes include moving from:

- Details to the big picture
- Narrow areas of discipline/ logic to a wide variety of new ideas
- High degrees of specialization to generalist skills
- Production to coalitions and partnerships
- Low need for social interaction to a high need for same
- Loyalty to a profession, trade, or skill to loyalty to an organization
- Responsibility for one’s own work to responsibility for the work of others

The technical characteristics and skills that make an individual a competent technician can hinder them as leaders. To be most successful, technical people must make the same level of commitment to developing and improving their leadership skills that they previously made to their technical skills. Many technical people find it very hard to give up the technical publications and meetings in favor of leadership publications and meetings. Effective leadership does not involve reversing powerful technical inclinations.

Technical people must give up or deemphasize some technical characteristics and skills in order to maximize their leadership capabilities.

A specific example of a technical inclination that must be addressed is the tendency of many technical people to be perfectionists. Perfectionism is not knowing when to stop. When is a perfectionist done? Only when time runs out! A perfectionist is someone who takes great pains in everything he or she does and gives those pains to everyone else. As a perfectionist the people an individual works and lives with can be a constant source of disappointment. You are now reading a real-life personal example of perfectionism at work. If it were not for a publishing deadline, I might still be working to “perfect” this article. Perfectionism saps energy, steals time, and ultimately negatively impacts success. Being the most effective leader requires us to address this vulnerability.

These vulnerabilities can be addressed by following a three step process.

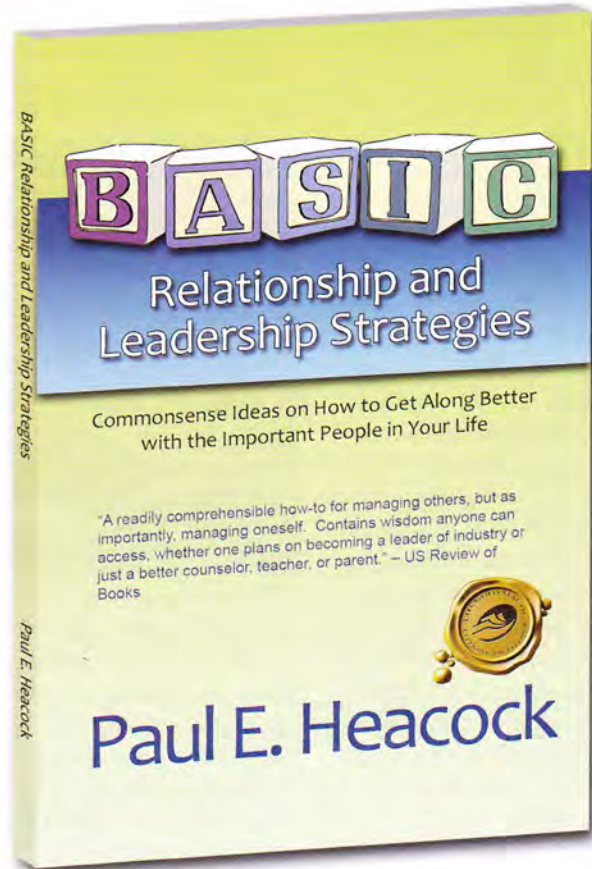
1. Recognize the vulnerability.
2. Develop a step-by-step plan for improvement.
3. Express your commitment to address the vulnerability to another person (probably not your immediate boss) for support and feedback.

Another important element of making an effective transition to leadership is keeping a proper balance among technical, interpersonal, and administrative

skills. Technical skills are those with a professional focus (accounting, finance, math, programming, systems analysis, etc.). Interpersonal skills are those needed to work effectively with others. Administrative skills are those needed to deal with the inevitable bureaucracy of organizations (forms, politics, power, etc.). The Carnegie Institute conducted a study of the skills that are needed to advance in one’s chosen profession. The key finding of this study is that once in the chosen profession, having proven the necessary basic technical skills, one’s future advancement is likely to be 85% based on interpersonal and administrative skills and only 15% based on technical skills.

Although one could certainly debate the exact percentages, I have often observed technical people’s career advancement limited by their lack of or proper use of interpersonal and administrative skills.

Making the essential transition from a technical or individual contributor role to a leadership role truly does involve crossing a threshold. This threshold requires rechanneling some of the powerful technical attributes that led to success as a technical person and at the same time valuing and effectively implementing the attributes needed to be the most effective leader possible. Once in a leadership role the technical person must also maintain and display a proper balance among the technical, interpersonal, and administrative skills needed to be an effective leader.



Note: This article is excerpted from Paul Heacock’s recently published book *BASIC Relationship and Leadership Strategies – Commonsense Ideas on How to Get Along Better with the Important People in Your Life*. Paul, an IASA Past President, has been involved with IASA since 1971 – serving in various Local Chapter and International Board positions. Paul served as the IASA International President in 1979-1980. More details on the book and sample videos of presentations based on the book are on Paul’s website: <http://www.BasicRelationships.com/home.html>.

The book and presentations summarize the leadership and personal relationship lessons Paul learned over the last 47+ years in his roles as a business leader, marriage partner, parent of two daughters, as well as grandparent of one precious little girl. Paul believes that these BASIC principles apply equally to all the roles we play in life – leader, partner, parent and grandparent. The book and presentations offer a proprietary BASIC acronym to remember and better use these commonsense ideas.

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