I don't know what we'd do without him!" That's what an executive in a Fortune 100 company recently told us about a brilliant project leader. We've heard the same sentiment expressed about many highly skilled specialists during the hundred-plus interviews we've conducted as part of our research into knowledge use and sharing. In organizations large and small, including NASA, the U.S. Forest Service, SAP, and Raytheon, managers spoke of their dependence on colleagues who have "deep smarts"—business-critical expertise, built up through years of experience, which helps them make wise, swift decisions about both strategy and tactics. These mavens may be top salespeople, technical wizards, risk managers, or operations troubleshooters, but they are all the "go-to" people for a given type of knowledge in their organizations.

Because deep smarts are mostly in experts' heads—and sometimes people don't even recognize that they possess them—they aren't all that easy to pass on. This is a serious problem, both for the organization and for those who hope to become experts themselves. Several professions build apprenticeships into their training systems. Doctors, for instance, learn on the job as interns and residents, under the close guidance of attending physicians, before practicing on their own. But the management profession has no such path. You're responsible for your own development. If you wish to become a go-to person in your organization but don't have the time or opportunity to accumulate all the experience of your predecessors, you must acquire the
**EXPERIENCE**

**Tools for Building Deep Smarts**

Becoming an expert begins with deciding whom you will acquire knowledge from and how. Here is an excerpt from a step-by-step plan drawn up by Melissa, a high-potential sales rep in the beverage industry who aspires to become her firm's in-house whiz at distribution. Her chosen mentor is George, a general manager at her company who is the “go-to” guy in that area.

<table>
<thead>
<tr>
<th><strong>ACTION PLAN</strong></th>
<th><strong>OBSERVATION</strong></th>
<th><strong>PRACTICE</strong></th>
<th><strong>PARTNER &amp; PROBLEM SOLVE</strong></th>
<th><strong>TAKE RESPONSIBILITY</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>IMMEDIATE GOAL 2 MONTHS</strong></td>
<td>Learn how to evaluate distributors by studying retail stores they service</td>
<td>SHORT-TERM GOAL 6 MONTHS</td>
<td>Learn how to evaluate our firm’s performance from the distributors’ point of view</td>
<td>MIDTERM GOAL 12 MONTHS</td>
</tr>
<tr>
<td><strong>ULTIMATE GOAL 24 MONTHS</strong></td>
<td>Be considered a go-to person for issues with distributors</td>
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</table>

**TO-DO** Visit five stores with George and record what he notices.

TO-DO Interview three distributors in region, asking about three things we do better and three things we do worse than competitors.

TO-DO Analyze data from problem region and visit stores there. With George, visit underperforming distributors; then help him formulate a plan for addressing.

TO-DO Take the lead on resolving conflicts between distributors and our company and let George become the backup.

As she puts her plan into effect, Melissa codifies her new knowledge in notes, which she later reviews and discusses with George.

**LEARNING LOG**

<table>
<thead>
<tr>
<th><strong>FEBRUARY 2011</strong></th>
<th><strong>AUGUST 2011</strong></th>
<th><strong>MARCH 2012</strong></th>
<th><strong>APRIL 2013</strong></th>
</tr>
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<tbody>
<tr>
<td>Visit to five retail stores with George</td>
<td>Visit to Kevan Wine &amp; Beer, a distributor</td>
<td>Interview of bottom three distributors in Midwest</td>
<td>Creation of a task force on competing with microbreweries and craft beers. I’m the distributor liaison on this!</td>
</tr>
<tr>
<td><strong>WHAT HAPPENED</strong></td>
<td></td>
<td></td>
<td><strong>WHAT HAPPENED</strong></td>
</tr>
<tr>
<td>Looked at product position in coolers, and percentage of our product there, pricing, and promotions vs. the competition. George rearranged products in the cooler! Cited stats about positioning when manager protested, and manager gave in.</td>
<td>George led off: Small talk, discussion of industry trends (puts guy at ease). Then he let me ask questions.</td>
<td>Distributor complains that we’re creating minor brands on rigid schedules, causing stockouts or oversupply (and expiration of “sell by” dates).</td>
<td>Visited our distributors who are also dealing with craft beers.</td>
</tr>
<tr>
<td><strong>INSIGHTS</strong></td>
<td></td>
<td></td>
<td><strong>INSIGHTS</strong></td>
</tr>
<tr>
<td>We have the best price points, but our ads and promotions are not as good as the competitors’. Distributor gave good feedback; could we institutionalize collecting it quarterly? Maybe build better feedback loop to ad agencies? Distributor mentioned best-selling outlet in vicinity; I should visit and find out why it’s doing so well.</td>
<td></td>
<td>Possible to schedule smaller but more-frequent batches? Rigid scheduling has ripple effect on distribution, from warehousing to delivery and merchandising in stores. Maybe top distributors have way to handle this that these underperformers don’t. Need to explore by visiting more distributors and interviewing sales reps.</td>
<td>Our distributors aren’t good at handling so many product lines in their warehouses. Our traditional lines are suffering from less attention. Two possible options: - Help distributors move more swiftly into better automated warehouse processes. - Push for more-exclusive contracts, so distributors handle only national brands—not craft beers. Need to investigate economics and feasibility of those solutions.</td>
</tr>
</tbody>
</table>

**A Rare Asset**

Deep smarts are not merely facts and data that anyone can access. They consist of know-how: skilled ways of thinking, making decisions, and behaving that lead to success again and again. Because they are typically experience-based, deep smarts take time to develop. They are often found in only a few individuals. They are also frequently at risk. Baby boomers—some of whom have knowledge vital to their companies—are retiring in droves. And even in organizations where key experts are years from retiring, there are often only a few people with deep smarts in certain areas. If they’re hired away or fall ill, their knowledge could be lost. In some fields, rapid growth or geographic expansion creates a sudden need for expertise that goes far beyond employees’ years of experience. Whatever the cause, the loss or scarcity of deep smarts can hurt the bottom line when deadlines are missed, a customer is alienated, or a process goes awry.

This potential loss to the organization is an opportunity for would-be experts. Deep smarts can’t be hired off the street or right out of school. High-potential employees who prove their ability to quickly and efficiently acquire expertise will find themselves in great demand.

So how do you acquire deep smarts? By consciously thinking about how the experts in your organization operate and deliberately learning from them. Of course, you can’t—and don’t want to—become a carbon copy of another person. Deeply smart people are unique—a product of their particular mind-set, education, and experience. But you should be able to identify the elements of their knowledge and behavior that make them so valuable to the organization. For example, a colleague of the expert project leader mentioned earlier described him as an exceptional manager who could effortlessly solve any technical problem and always got the best out of his people. Initially, the colleague
said he didn’t know how the guy did it. But, in fact, with some prodding, he could tell us that the project leader motivated his team members by matching their roles to their interests, offering them opportunities to present to clients, and taking personal responsibility for shortfalls and mistakes, while giving others credit for progress. On the technical front, the project leader used certain identifiable diagnostic questions to understand complex issues.

The admiring colleague could have recorded and mimicked these behaviors—but he didn’t. One reason, of course, is that the expert himself had never articulated his approach to project leadership. He simply recognized patterns from experience and applied solutions that had worked well in the past. It was second nature to him, like managerial muscle memory. The second stumbling block was that the colleague was accustomed to having people “push” expertise to him. That’s how school and formal management-development programs work. But in today’s competitive work world, that model isn’t sufficient. You can’t count on companies or mentors to equip you with the skills and experience you need. You must learn how to “pull” deep smarts from others.

The Right System
Let’s look at a specific case, a composite drawn from the many executives we’ve helped to attain deep smarts:

Melissa has been with a large international beer company for more than eight years, having previously worked in a retail outlet that sold its products. She is currently a sales representative, but she has her eye on a regional VP position. In thinking about how to become more valuable to her organization (indeed, to any beverage company), she considers which in-house experts she would like to emulate. George, a general manager who has risen through the ranks from sales, is known as a smart decision maker, an outstanding negotiator, and an innovator. His colleagues say he has a remarkable ability to think both strategically and tactically about the entire business, from the brewery to the consumer, and that he balances a passion for data with in-depth talks with people in the field. In short, he would be an excellent role model.

Not everything George knows is equally valuable, of course. And Melissa does have some expertise of her own. She doesn’t want to emulate George in every way. But she wishes she had his ability to evaluate, work with, and motivate the distributors who serve as the company’s conduit to retailers and, ultimately, to consumers. George knows a lot about distributors because he used to work for them; he started out driving a delivery truck and made his way up the ladder before being hired by the beer company. Still, Melissa isn’t going to work for a distributor; nor would it be necessary for her to experience everything George has. What she needs is to unearth the essential skills that make him so effective with distributors, internalize his insights, and mimic his critical behaviors.

Fortunately, George is willing to share his deep smarts with Melissa, but he has neither the time nor the inclination to make her training a priority. So it’s up to Melissa to figure out how to learn from him. She can take two approaches, which are not mutually exclusive. She can interview George and get him to tell her stories that will provide vicarious experiences. Would-be experts who don’t work alongside their role models typically need to rely on this approach. If Melissa is good at questioning, and George is able to articulate much of his knowledge, she will learn a lot. George might tell her, for instance, the story of how he first discovered the power of sales data to persuade retail store managers to display his brand of beer more prominently.

This process has limits, however. George can’t tell Melissa everything he knows, because much of his wisdom is unconscious; he doesn’t think about it until a particular situation calls for it. Moreover, he’s often unaware of the communication style, diagnostic patterns, and body language that he uses.
ON THE SAME PAGE
IN THE SAME ROOM
THOUSANDS OF MILES APART

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EXPERIENCE

How can Melissa learn these things? Through a process we call OPPTY, which stands for observation, practice, partnering and joint problem solving, and taking responsibility. Observation involves shadowing an expert and systematically analyzing what he or she does. Practice requires identifying a specific expert behavior or task that you can attempt on your own, but with supervision and feedback. Partnering and joint problem solving mean actively working with the expert to analyze and address challenges. Finally, when you’re ready, you can take over a significant part of the expert’s role. Along the way, you should deliberately reflect on each experience and internalize as much as possible.

When Melissa asks George to help her, she’s careful to frame his doing so as an opportunity for both of them, since having another distribution expert at the company will mean he’ll have more time to handle other issues. She also promises to structure the knowledge sharing so that it minimizes the disruption to his heavily packed schedule.

Next, she creates an action plan that outlines her near-term and ultimate goals and the steps required to achieve them, along with suggested deadlines. (See the exhibit “Tools for Building Deep Smarts.”) George, and possibly his boss, will need to sign off on it.

As she goes along, Melissa notes what she has learned in a log. It’s tempting to think this is unnecessary work, because we all remember very well what we’ve observed or done, and we assume we understand why experts behave as they do. Keeping a log forces you to check those assumptions. It serves as an accurate record of progress (allowing for the reevaluation of goals if need be) and ensures you’ve learned what you and the expert intended. You’ll want to ask yourself questions like, What was the context of the situation? What did the expert do and why did he do it? What did I do and what feedback did I get? What worked? What didn’t? What should I do next?
In the observation phase, Melissa accompanies George on his regular visits to retail stores. This takes no additional time or effort on his part—but is an eye-opener for her. Before they enter the first site, George challenges her: What in the store is serving it? She sees that he pays close attention to details such as the positioning of products in coolers, pricing relative to competitors, and even how prices are displayed. Melissa also listens when George talks with distributors, noticing how careful he is to speak about the broad advantages of suggested changes and how positive he is to ask probing questions about operations—for example, about what incentives salespeople are given. His body language suggests empathy; he leans forward and listens intently.

After a couple of months, Melissa is ready to move on to practice what she’s picked up from George. A few months after that, she begins to solve problems jointly with him. When George asks her to help analyze why a particular sales region has high sales volume but very low margins, she sees how useful it is to juxtapose data analysis with visits to the field. She watches George reject a distributor’s suggestion. She sees that he pays close attention to details such as the positioning of products in coolers, pricing relative to competitors, and even how prices are displayed. Melissa also listens when George talks with distributors, noticing how careful he is to speak about the broad advantages of suggested changes and how positive he is to ask probing questions about operations—for example, about what incentives salespeople are given. His body language suggests empathy; he leans forward and listens intently.

**Guided Experience**

The system we outline in this article works best when aspiring experts have both time to learn and geographic proximity to the masters who will train them. However, our methods can be applied across distances and compressed in time. The U.S. Army, for example, uses parts of this process to transfer knowledge from officers serving overseas to personnel about to be deployed to the same regions. The transfer of expertise need not be one-on-one, either. An individual can accrue deep smarts from more than one expert, and an expert can mentor more than one individual.

No matter how sophisticated current technologies for data capture and analysis are, we are still highly dependent upon human skills in many situations, and such skills are best learned from experts. There is an old saying: Good judgment comes from the experience of having made bad decisions. But we believe it’s more effective and efficient to build expertise through experiences guided by the smart people around you. If you observe, practice, partner, and problem solve with them before taking responsibility on your own, you’ll soon become as indispensable as they are.

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