Going from Accidental Techie to Technology Leader

Robert Weiner, President, Robert L. Weiner Consulting

February 1, 2011

Last July, Holly Ross wrote that it was time to retire the phrase "accidental techie". She said, "it's not very nice to call anyone an accidental anything. What's really gotten under my skin lately, though, is that as long as someone is an 'accidental' techie, they're going to have a heck of a time being taken seriously."

I agreed, but only to an extent. On one hand, those who decide that technology will be their vocations need to push for roles and titles that reflect what they really do. They're ready to graduate from their apprenticeships. But many accidental techies don't want to become intentional/professional/full-time techies. And some may love the tech part of their jobs, but it will remain a small, incidental (accidental?) part of what they do.

This article is meant for those who want to stop being accidental and move into a technology leadership role. I often refer back to a 2003 article by Barbara Kaufman published in *University Business* magazine called *Transforming Your CIO*. Ms. Kaufman described eight traits of a successful technology leader:

- Functional business orientation and communication skills
- Political savvy.
- The ability to balance long-term vision and basic day-to-day needs
- Good project planning and control
- The ability to influence
- The ability to identify, motivate, and develop talent (assuming you supervise others).
- A commitment to continuing education for yourself and your staff.
- Vision.

Ms. Kaufman summed up the keys to success nicely. But since I've been a consultant for over a decade and may have lost touch with the real world, I asked several friends who have moved up the ladder of technical leadership what advice they would offer. The tips below are from Tracy Kronzak, Technology Manager at the Applied Research Center in Oakland, CA, Christina Pulawski, a Chicago-based consultant who advises on fundraising systems and processes (and former Director of Development and Donor Services at Loyola University Chicago), and Lisa Watson, Executive Director of Advancement Services for the University of California's Riverside campus. Peter Campbell, Director of Information Technology at Earthjustice in Oakland, reviewed several drafts and added his insights. I've organized these tips around the traits Ms. Kaufman identified.

Show functional business orientation and communication skills

- Show colleagues that you can think like they do. Leadership needs to know that you understand their vision, goals, dreams, hopes, fears, etc.

- Ask yourself: Do you understand the big picture of the issue that's being addressed?

- Know your users. I always tell people that my job is 50% knowledge and skill, and 50% knowing the people I work for.

- Communicate clearly. This takes many forms: find out how your organization learns best. Is it a weekly IT newsletter? Targeted emails? Training videos? Presentations at staff meetings? And the corollary to this: Speak plainly. I've used humor, diagrams, and the occasional utterance of "magic happens at this moment" to convey simplified explanations of what needs to happen for me to do my job and for the organization to have a functioning IT infrastructure.

Political savvy and the ability to influence

- Listen and engage. People who come to tech from other roles in the organization often feel like, when it comes to supporting the function they started in, they can do it all for their users. But users should always be involved in the planning of technology upgrades, and they should have the last word on what functionality is required. Value their engagement, because engagement is a precursor to buy-in.

- Continually demonstrate a proactive, service-oriented vision. It helps a lot to know what they want and need before they do. Bringing them cool

solutions to problems they didn't even know they had will score big points.

- Know yourself. I'd rather be able to honestly say, "I don't know, but I'll find out" than convince my managers that I know everything.

- Be clear about the positive outcomes of what you're doing. It also took me a long time to learn that no one understood what I did because I simply wasn't telling anyone.

- Some questions I've asked myself in these situations: How do you contribute at meetings or other interactions with decision-makers? Do you look for solutions or throw tantrums? Are you so enamored of a particular technology or process that you are blinded to whether it will be a good fit for your organization or in this particular situation? Can you demonstrate how your ideas and solutions are win-wins across the board? Are you naive in terms of how decisions are actually made?

- Be ethical. Every day I read another story of a disgruntled IT worker taking down an organization's network, its data, or doing something horrific to its users—and if I'm reading it in the local paper I can bet that my managers are as well. Having a legitimate disagreement is one thing, but abusing your position either by acting out or failing to act when you should doesn't just affect you, it affects your co-workers and reflects poorly on the profession.

- Understand how your organization works, how decisions get made. You may get a seat at the leadership table in name, but that may not necessarily be where decisions actually get made—that's where they get rubber-stamped.

- It's equally important to understand what leadership (singly or as a group) values. Do they value efficiency? Relationships? Predictability? Common background?

- Develop partners and allies. They can help you navigate the political waters and also help you build broader support. Pull these folks into a circle of "power users," give them resources and training, and ask for their feedback on your plans. They'll become ambassadors for your work. This isn't an "in group;" they should help you expand the circle.

- The bottom line: show how you and your team add value. The goal is to get them to trust and rely on you so much that they feel they simply could not do their jobs without you.

Balance long-term vision and basic day-to-day needs, and exercise good project planning and control

- Plan your work and work your plan. Always do your homework, present well thought out plans (including timelines), and deliver the goods (preferably on time and under budget).

- Balance implementing industry best practices with doing what's best for your organization.

- Anticipate unintended consequences. This one can be tricky. No one can think of every contingency for a project, but you can reduce the likelihood that you'll be caught red-faced by doing your homework and asking for advice from leaders in your field.

- Get good at cost/benefit analysis and measuring ROI. At the end of the day, you have to "show them the money."

- Don't fudge your costs. There's a lot of pressure to do things as cheaply as possible (particularly in today's economy), but if paying more for something allows you, the organization, and your users to function more efficiently, then explain the actual costs and the risks of not investing appropriately.

Identify, motivate, and develop talent and your own skills

- Hire the best tech staff you can afford.

- Develop your professional network, a pool of colleagues and friends who can help you when you need it.

- Convey the need to constantly learn.

So what should you do?

I've found that the keys to becoming a technology leader are understanding your organization's "business," long-range goals, short-term needs, and mission; showing how technology can help achieve those goals; communicating clearly in language your colleagues can understand; finding allies and playing well with others; balancing long-term planning with day-to-day firefighting; managing staff and projects well; and understanding how things really get done in your organization so you can influence decisions. Simple, right?

In all seriousness, I think accidental techies have advantages that many "real" techies lack: since they often started in a support role they understand their organization's mission and culture. They speak the lingo, can empathize with users, and (I hope) are trusted by their colleagues. Those traits can gain them credibility, support, and influence.

Effective technology leadership requires a skill set that's broader than technical skills. Resist the temptation to think, "I can't be a technology leader because I'm not a *real* techie." Technical skills don't equal technical leadership; you need to understand how to tie technology to people, mission, and strategy. If you lack hard technology skills you can take classes (and of course attend the Nonprofit Technology Conference). The soft skills are often the hardest to acquire.

Robert Weiner is President of Robert L. Weiner Consulting where he helps nonprofits make strategic decisions about fundraising technologies and back-office fundraising operations.