

It's time to seek more **balance** within our skill sets so we don't become **overspecialized** and less valuable to our employers.

BRING BACK THE GENERALIST

BY GREGORY F. PASHKE, CMA, CFM, CPA

IS IT JUST ME, or has anyone else noticed the explosion of experts and specialty designations? Each one has its own language, its own mysterious terminology, and its unique way of viewing the world.

We are an evolving society composed of experts who literally know more and more about less and less. Is this trend healthy or something we should be concerned about?

Are generalist skills passé? I don't think so. I submit they are more important than ever. The secret is using the skills of the generalist to leverage and integrate the specialized knowledge that is necessary in our complex society.

Let's explore a few of the inherent risks associated with overspecialization. Then let's see if the skills of the generalist can reduce or mitigate those hazards.

THE STATE OF AFFAIRS

Robert Pirsig, in his classic book *Zen and the Art of Motorcycle Maintenance*, observed: "It's a problem of our time; the range of human knowledge today is so great that we're all specialists and the distance between specializations has become so great that anyone who seeks to wander freely among them almost has to forego closeness with the people around him."

The statement is both insightful and profound. What's even more interesting is that this quote is nearly 30 years old, and there has been an acceleration of specialization since that time. Pirsig recognized the overemphasis that society was placing on specialists. He also acknowledged the considerable communication gaps between various areas of expertise and the general public.

My own professional experience has traversed a fairly typical path since I took and passed the CPA exam in May 1972. At that time, the letters CPA conveyed broad knowl-

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edge in financial, accounting, business, and tax matters. Since then, newer and more specialized certifications have sprung up. I hold eight—in accounting, finance, management consulting, and business valuation. Of those, only the CPA designation existed when I passed that exam. (The first Certified Management Accountant (CMA) exam was given in December 1972.) As I accumulated these certifications over the years, it began to gnaw at me that, with all this deepening specialization, there was a growing need for individuals with the skills to integrate, understand, and relate the significance of it all.

And it isn't just accounting; the trend pervades every area of society. Medicine, law, insurance, social work—you name it, the impact is the same. A few years ago Paul Harvey shared a story about a distinguished-looking man who frequently stood on the freeway near San Diego. He held a sign: Will do ANTHROPOLOGY for FOOD! I doubt, however, that anthropology services will ever be in much demand from passing motorists, yet it's a brief commentary on the state we are in.

OVERSPECIALIZATION RISKS

What are some of the risks associated with overspecialization?

Communication Difficulties

The jargon of each specialty restricts real communication. When only the technocrats comprehend the lexicon, the general public and other specialists are left in the dark. How often are you in a meeting when the technical complexity (taxes, benefit plans, Sarbanes-Oxley) and/or terminology (acronyms, models, definitions) either leave you clueless or daydreaming to escape? We desperately need people who can bridge these communication gaps. That's what made Carl Sagan so special. He could take complex scientific matters and explain them in captivating and enlightening ways that even the average Greg could understand. Carl, we truly miss you, and we need more just like you.

Breeding Ground for Charlatans

It becomes more difficult to determine who the competent specialists are and enables the charlatans to deceive us more easily. Pseudo experts (Miss Cleo, alternative medicine in some cases, etc.) can mesmerize and exploit us, the gullible public. Our inherent trust of experts is often counterproductive to our best interests, and we are easy prey. How often do you feel vulnerable or manipulated when you're around experts in unfamiliar fields?

Solutions in Search of a Problem

There's an adage I refer to in my consulting practice: "If all you have is a hammer, every problem looks like a nail." Too often, experts who are schooled in only one solution but who have substantial marketing assistance push their customers into unwise choices. For example, annuities make sense in some circumstances but not as the sole solution for every investor on the planet. Do you maintain a healthy dose of skepticism and consider other alternatives before committing to a course of action?

A Closed Thought Process

Ralph Waldo Emerson recognized that "the field cannot well be seen from within the field." I've also heard the situation expressed as, "If you always think what you've always thought, you'll always get what you've always got!" Typically, major advances seem to come from outside a discipline because progress often requires challenging cherished assumptions. Will this become more problematic as specialties increase? Shouldn't the ideal be

A SPECIALIST AND A GENERALIST

PEOPLE SOMETIMES ASK ME why I pursued all of my certifications and how they have helped me. After I earned my MBA degree, I worked for Ernst & Ernst (now Ernst & Young) for a year before I could take the CPA exam in Pennsylvania in May 1972. In June 1973, I took the CMA exam primarily as a way to keep current and to leverage the skills from my MBA. I would have taken the CMA exam in December 1972, but I wasn't aware of it. I always felt that the MBA prepared me more for the CMA than what I learned at E&E, although that experience was still very valuable. The CMA was broader in scope than the CPA exam, and it widened my perspective. After that, the certifications started to fall into place. The CPA/CMA led to a consulting credential, and then years later the business appraisal and CFM areas beckoned.

I love to learn new things, and continuing education has always been a core issue for me. I view the three areas of consulting, appraisal, and finance/accounting as concentric circles that have areas of definite overlap, and knowing one helps me to appreciate and understand the others. But I'm also painfully aware of how much resides outside the areas I have some knowledge in. The certifications helped me in my career since I could see things from varied, deepened, and broader perspectives, and I found myself thinking differently than many of my colleagues. It led to some solutions for clients that I might not have reached without the bene-

fit of a broader view. I'm not sure if I've made any more money, but it was a path with a heart for me.

In the '70s, I was one of the biggest fans of specialization, but, as time went on, I began to appreciate the benefits of seeing the "big picture." As our society became more complex, so did all the professions, and they began to split into smaller groups with the perceived benefits of specialized knowledge. Years ago, the American Management Association had a grassroots chapter organization called the Society for the Advancement of Management. It was broad in scope and included members from accounting, engineering, purchasing, insurance, nonprofits, etc. It was a great organization, but it didn't continue in its original format (although it remains an excellent resource for collegiate business clubs). Emphasis shifted toward technical organizations and away from broad ones, and companies would pay for one professional membership but not for many.

Yet as our professions became more specialized, it grew clear that we needed people with the skills to integrate/understand all this new information—the generalists. We specialists and generalists are becoming more and more interdependent, and we have a great responsibility as professionals to communicate what we do in a manner that aids the organizations we serve. We need to help clarify and expand knowledge rather than obfuscate and confuse.

increased sharing and consideration of novel ideas? Try to be aware of your own inherent biases and limitations.

Loss of Personal Confidence

We also feel pressure to consult the "experts" for everything. Each night on cable TV, we witness a parade of expert commentators who advise us on everything from the food we eat to the way we raise our children to the financial avenues we should pursue. We have to relearn to trust our own instincts and judgment. They are often much wiser than experts pushing a specific brand of miracle elixir. The "hottest thing" may or may not be appropriate for the organizations we serve.

Impediment to Career Flexibility

Since technology changes pretty quickly, it's safe to say that the useful "lifespan" of any emerging technology is becoming shorter and shorter. Two new ones, Voice Over Internet Protocol (VOIP) and Application Service Provider (ASP), weren't on my radar screen until recently, yet they both have profound implications for how we will manage, evaluate, and control our operations. But how long will they last until the next wave comes along? What is the impact to you if you are trained in a specialty that

suddenly goes away? Narrow, specialized knowledge can be highly valued one day, a commodity the next, and replaced a short time later.

ENTER THE GENERALIST

Yes, specialization is an inevitable trend, and it can be good in many cases. But is there a role for "generalist skills" that help us cope and that will actually enhance the value of specialized expertise? I think so.

A Positive Awakening

Awareness usually precedes meaningful change, and I see some optimistic signs. For example, holistic medicine is making a comeback. And there is a greater recognition of the communications gap between disciplines, which many professions are beginning to address.

Let me return to my own experience for an example of some progress. A few years ago, the American Institute of Certified Public Accountants (AICPA) undertook a landmark Vision Project aimed at exploring the future of the CPA profession in a changing environment. One of the components of that process was to predict the core competencies (skills) necessary for CPAs in the future. *I suggest they equally apply for the CMAs and CFMs of*

tomorrow. The five competencies identified are very interesting:

1. Communication and Leadership Skills
2. Strategic and Critical Thinking Skills
3. Focus on the Customers, Client, and Market
4. Interpretation of Converging Information
5. Technologically Adept

Does anything strike you as you look at this list? Look at it again! Technical skills are almost assumed. Most of the items on that list are what I consider generalist skills that could apply to any profession. What's even more significant—most of them aren't sufficiently addressed in traditional education. I've overheard several conversations about how the graduates of today have good "technical" skills but seem to lack the oral and written communication skills of their predecessors from decades ago. I believe that the gradual shift away from essay questions to objective testing (true/false and multiple choice) in college is part of the explanation. If you are forced to write, you'll tend to develop focus and improve your critical thinking skills.

Wouldn't these communications, leadership, strategic, and critical thinking skills be beneficial to practitioners in any technical field? Maybe the old advocates of liberal arts colleges were right. Taking courses in philosophy, speech, art, logic, and science can do more than prepare us as potential contestants on "Who Wants to Be a Millionaire?" or "Jeopardy."

Professional Responsibility

Every profession needs to address precisely how its members can develop the communication, leadership, critical thinking, and important listening skills necessary for those specialists to be effective. *Specialists do not live in a vacuum.* They not only have responsibility for their expertise, but they have an inherent responsibility to convey its importance to society in an effective way. They need to clarify their role, not obfuscate it in technical jargon. Do you explain things in a fashion that the user of your expertise can relate to? Try to see the world from that perspective. Simplification can be challenging but very rewarding.

Don't Forget—Accounting Is a Generalist Skill

Accounting has been called the "language of business." That emphasizes its role as a communications tool. We've always been generalists trying to relate information and knowledge to a variety of internal and external users. It isn't the numbers but what they convey. Doesn't it make

sense to view your function as a collaborative, facilitating, and mentoring one?

Seek Balanced Skill Sets

In your pursuit of lifelong learning, seek a healthy balance between technical expertise and generalist skills. Both are important. Maybe taking a Dale Carnegie course, writing an article for *Strategic Finance*, or joining a Toastmasters' Club will stretch you in new ways and make you more valuable to your organization.

Challenge the Experts

When dealing with other experts, challenge them to explain things in a way that you can understand. Ask questions, and focus on the significance and implications of what these colleagues are trying to convey.

Think and Act in Broad Terms

We desperately need broad-thinking generalists. Buckminster Fuller, one of my philosophic idols, urged us to become "comprehensivists," which is thinking in the broadest possible terms. Bucky realized the critical need to "see the big picture." It's time we heeded his call.

Here's what we need to do:

- ◆ Recognize that specialization is here to stay, whether we like it or not.
- ◆ Recognize that overspecialization has some risks associated with it. Appreciate that many of these can be mitigated by responsible specialists and a thoughtful public.
- ◆ Recognize the importance of generalist skills to help navigate between specialists and to help enhance the benefits of their expertise.

Our mission, should we choose to accept it, is to seek more balance within our skill sets and challenge the way we perform our professional duties. As we pursue specialties, we shouldn't ignore our generalist coping skills. Rather, we need to focus on them! Our mission isn't impossible, but it does require effort, common sense, and a pursuit of integrated knowledge. Carpe diem! ■

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