



Expertise to the
Power of Eloquence

The Expertise Imperative

An NSA White Paper
On the Future of the Speaking Profession

Expertise Imperative Authors

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What This Project is About

In March 2000, the National Speakers Association Board of Directors made an alteration to the organization's mission statement. NSA would henceforth become "the leading association of experts who speak." While little was said about the revision at the time, the speaking profession was about to enter one of the most turbulent periods of contraction and uncertainty since NSA's founding in 1973.

In late 2002, NSA President-elect Mark Sanborn, CSP, CPAE, invited a committee of members to take on the task of discussing the implications of the changing marketplace. "Critical to the long-term success of NSA, its brand and the speaking profession will be the emphasis of 'expertise.' To overcome the stigma of being an association of speakers who give 'three points and a poem,' NSA has committed to targeting and serving 'experts who speak professionally.'"

"It won't be enough to be a good speaker," Sanborn concluded. "Being able to develop, demonstrate and enhance expertise and then communicate it effectively and powerfully will be key." Sanborn charged the group to assist the membership and "bring definition and framework to expertise: what it is, how to develop and enhance it, how to demonstrate it and other important nuances of the topic."

A few weeks into the project, those of us on the committee realized we had been asked to do the nearly impossible by delineating what constitutes marketable expertise. Hundreds of e-mails, dozens of opinions, viewpoints, rebuttals and a thousand combined person-hours later, this paper is a result of our discussion, debate, research and thought.

In this paper, we seek to understand expertise in both a general sense and as it is understood and ascertained in other professions. We discuss how the demand for a unique form of expertise relates to the business of speaking and examine how a changing marketplace portends that *expertise*, crafted uniquely and delivered eloquently and effectively, can become a competitive advantage for our members. Finally, we invite you, as a fellow professional speaker, to consider how our insights into this subject might improve your own effectiveness and raise the perception of professional speaking in the meetings industry.

Why Expertise is the New Imperative

In an era of uncertainty, we are certain of one thing: *the fundamental value of employing paid professional speakers is being re-examined like never before.* We have arrived at what Intel Chairman Andrew Grove calls a "strategic inflection point." In his book, *Only the Paranoid Survive*, Grove describes "a time in the life of a business [or industry] when its fundamentals are about to [or have already] changed... that change can mean an opportunity to rise to new heights. But it may just as likely signal the beginning of the end."

We believe that today's challenging marketplace does not signal the beginning of the end of our profession, but that today's adversity can become our opportunity to rise to new heights.

In the foreseeable future, clients who hire speakers will negotiate harder, press for fee concessions and other give-backs, and at the same time demand, extensive



preparation, customization and sharply-focused understanding of audience needs. *Most damaging for long-term growth prospects is their perception that hiring professional speakers is not essential to ensuring successful meetings.* The phrase, “we are using industry experts” has become all too familiar. Professional speakers face expert competitors. Not only is the niche expert priced at a lower fee, but he or she is all too willing to lower fees or work for free just for the “exposure” or to gain clients for a separate business, such as consulting.

The appeal of these presenters is not only their willingness to work for less money. More importantly, it’s their *expertise*. Typically, they know more about the specific industry, field, category, client or profession than the professional speaker. Their credibility is almost always based on experience. Their knowledge is current and often supported with proprietary research. The audience often knows them by reputation.

Client audiences have a tremendous need to hear from experts as the pace of regulatory, social, lifestyle and technological change continues to explode. Conventions and conferences are now looked at not as a perk for a job well done, but as an *investment*. Any expenditure of time, money and talent will continue to warrant a measurable return on investment.

Preparing for Tomorrow

In this new environment, we believe value will be the overriding factor in the choice of whether to hire outside professional speakers and on which speakers are chosen. The ability to demonstrate and make tangible the value of our unique expertise will be essential to the prosperity of our profession and may well be required for its survival.

What this market also portends is that as a brand, *we are in this together*. Professional Speaker X who fails to deliver the goods makes it less likely that next time the same decision-maker will shell out big bucks to put Professional Speaker Y on the platform. Although there will always be a place for presentations that are solely entertaining, humorous or emotionally compelling, it will no longer be enough for content speakers to impart a few easily remembered points of wisdom and pick up a paycheck.

Does this mean that the speaker with accomplished platform skills, but with a subject expertise that is shallow and based upon “reading a few articles and putting together a talk,” will not be viable in the marketplace of the future?

Our conclusion is that this reality is already upon us.

What Expertise Is and Why It Matters

On the surface, there is nothing complicated about expertise. *Webster’s New World Dictionary* wastes no words in defining it as “the skill, knowledge, and judgment of an expert.” And what is an expert? “A person who is very skillful or highly trained and informed in some special field.” Various academic researchers have denoted two, three or more types of expertise and all agree that expertise is beyond competence. Competence is the possession of *required* skills, strengths, traits, behaviors and abilities that enable an individual to perform sufficiently to complete a job or assignment.



Early researchers distinguished between content/knowledge and process/performance. For professional speakers, the most relevant research on measuring expertise may come from studies of teachers. Researchers who focus on teaching added a third type of expertise: pedagogical. Pedagogical experts are superior instructors. *Their students learn more than students of novices.*

It may be useful to think about whether speaking expertise in some fields can be measured by the results obtained by audience members. Might expert sales trainers, for example, be measured by the increase in sales after their presentations? Granted, there may be several factors that affect sales. For instance, the “Hawthorne Effect” indicates improved performance simply because sales people are being acknowledged. Nonetheless, the fact that a trainer’s effectiveness may be difficult to measure does not mean it shouldn’t be measured. Moreover, assuming all other factors are equal, we could at least say that particular sales trainers are not experts if, over time, sales consistently go down after they speak.

Deepening Your Expertise for a Changing Market

If the “expert who speaks professionally” is the success model of our future, then how does one go about developing expertise—or furthering it? Researchers acknowledge there is a continuum of expertise with five levels: novice, advanced beginner, competent, proficient and expert.

How do people develop from novice to expert? Initially, researchers had thought that expertise is developed through education, training, research, attainment of credentials or years of experience. Teachers who are considered experts attended continuing education courses in the field, kept up on the literature and research, knew the large controversies and debates that were underway in the field, reflected on their practice, and adapted their work to changes in the field.

Although all of these may be important, only some are necessary for expertise, and none of them are sufficient. More recently, researchers have thought that expertise is developed through “deliberate practice.” Deliberate practice is something that cannot be done while working or performing. It has four elements: the practice focuses on a well-defined task; the task is at an appropriate level of difficulty; the person receives informative feedback; and the person has opportunities for repetition and correction of errors.¹

Informative feedback can come from the environment; for example, a tennis player practicing serves can see if the ball is in or out. But for more complex tasks, a coach or teacher provides feedback. How long must one practice? The “10-year rule” says that anyone seeking to perform at world-class level in any significant field must engage in sustained, deliberate practice in the activity for at least 10 years.²

Further research is available in the appendix of this paper.

¹ Krampe, R. Th., & Ericsson, K. A. (1996), “Maintaining excellence: Deliberate practice and elite performance in younger and older pianists,” *Journal of Experimental Psychology: General*, 125, 331–359; Ericsson, K. A. (Ed.) “The acquisition to expert performance: An introduction to some of the issues,” *The Road to Excellence: The Acquisition of Expert Performance in the Arts and Sciences, Sports and Games* (pp. 1–50). Mahwah, NJ: Lawrence Erlbaum Associates.

² Ericsson, K. A., Krampe, R. T., & Tesch-Romer, C. (1993). The role of deliberate practice in the acquisition of expert performance. *Psychological Review*, 100, 363–406.



Measuring the Expertise of the Professional Speaker

After our foray into the literature and research on expertise, we began to see which dimensions or manifestations of expertise made sense in our field and which did not. Our Task Force agreed that the following metrics can serve as guidelines for identifying expertise and *goals* for enhancing our expert standing. This list is not meant to be exhaustive but presented as a guideline. What follows is a list of dimensions of expertise and criteria that measure the attainment of each dimension. We propose that an individual's expertise be established by an attainment of preponderance (75 percent of the overall criteria and at least 60 percent in any single dimension) in each "expertise dimension."

Expertise Dimension

Standard

A Perceived Authority

- Relates the topic to contemporary needs using examples
- Answers questions extemporaneously to the questioner's satisfaction
- Provides varied examples for validity of one's views
- Debates, accepts or overcomes contrary views
- Third parties cite with esteem and respect

Educator and Interpreter

- Explains the history of the topic comprehensively
- Synthesizes current original research and new thinking in the field
- Interprets the work of others for popular understanding
- Translates research into practical insights, tools and skills
- Provides bibliographies of resources other than one's own work
- Affects positive change in behavior of those who hear the presentation



Expertise Dimension

Standard

Contributor in the Field

- Publishes in periodic literature
- Cited positively by others in conversation
- Has contributed original ideas recognized by others
- Holds copyrights, trademarks, patents
- Has taught, at least part-time, in universities
- Serves as an expert witness
- Has commercially-published book(s)
- Has created products on the specialty/expertise
- Credited with pioneering an idea or technique

Sought After by Others

- Interviewed in the media
- Clients proactively contact for bookings
- Bureaus readily represent and seek out
- Repeat engagements are common (at least 50 percent)
- Quoted/cited by others in their work
- Appears by invitation on panels, discussion groups

Counselor and Mentor

- Others ask for coaching, mentoring and direction
- Represents a “point of view” or “school of thought”
- Used as confidante by peers (not only neophytes)
- Credited by others for their own success and focus
- Asked to be arbiter about disagreements, accusations in his or her field

Longevity/Consistency

- Has evolved approaches and improved upon past work
- Consistently considered in the forefront of the field during a period of years
- Reinforces current thinking with ongoing contemporary work and examples, not reliant on the past
- Has added new clients added every year
- Has had a continuing stream of success without interruption



Expertise Dimension

Public Acclaim

Standard

- Has received awards, accolades from third parties
- Has received honors from his or her profession
- Is clearly identified with his or her market or niche
- Is known by reputation and accomplishments
- Works internationally
- Possesses clear and unique brands

Lifelong Development

- Attends and leads sessions at professional conferences
- Holds advanced educational and/or professional degrees and designations in his or her field
- Belongs to all major trade associations associated with his or her specialty
- Has held trade association and/or professional association leadership positions
- Has an award, approach or technique named in his or her honor

Service Orientation

- Contributes financially to the profession
- Boosts constructive alternatives and does not denigrate others
- Provides substantial pro bono assistance
- Chairs or leads community endeavors
- Recognized as an excellent teacher

Ethics and Character

- Exemplifies the highest degree of ethical behavior
- Attributes clearly and promptly any work by others that he or she utilizes and/or quotes
- Shares credit and acknowledges others in the field
- Is trusted and used as an example
- Admits mistakes and acknowledges errors promptly



Recommendations

Should standards for expertise be *formalized* in an Association that considers itself “the leading organization for experts who speak professionally?” We deliberated this question and decided, for now at least, that this would not be the best course. Members of our Association must evaluate their own levels of expertise. The association has a responsibility for providing education that can stimulate attainment, accelerate enhancement and leverage the value of that expertise. And of course, the best metric will continue to be the marketplace that we serve. Beyond this, we believe that as an NSA member you should:

- Evaluate yourself in comparison to the metrics above. Can you confidently state that you are an expert as you compare your practice against the criteria? If you fall behind in a certain dimension, does that point to an opportunity area for improvement?
- Emphasize and demonstrate expertise in your communication with clients. Shift away from pointing out only the entertaining or platform-oriented aspects of your work and highlight the value that stems from your expertise.
- Maintain a Web site that is state-of-the-art and highly respected in your field.
- Actively search for interview opportunities in the major media that demonstrate your expertise.
- Seek out testimonials from clients that emphasize the value of the expertise you deliver from the platform.
- Deepen your understanding of your field. Fill in gaps in your understanding of the historical and research roots of your topics. Take courses, matriculated or non-matriculated, in your subject area every year.
- Subscribe to and read all the pertinent journals and newsletters in your field of expertise.
- Read six books in your subject field each year.
- Write at least one book in your area of expertise.
- Serve as a mentor in your field.
- Take leadership positions in applicable trade and professional associations.
- Teach at a community college, university, trade school or adult education program where you share your depth of expertise in the field.
- Seek out opportunities where you can engage in dialogue regarding your area of expertise. Participate in forums, symposia, debates, discussions (both live and electronic), mastermind groups and colloquies in your area of expertise.
- Evolve and change your presentations every year to reflect new thinking and deeper understanding of your subject.



- Work to improve continuously by seeking out opportunities for deliberate practice. Critically review video and audio of yourself, work with coaches, take classes and belong to a peer advisory group that will aid you in development and improvement.
- Enhance your reputation in your area of expertise by the challenging practice of contributing *original thought* to the field. Become known for developing new models, approaches and techniques in your subject areas. Achieve the reputation of a valued innovator and deep thinker.
- Always take questions in your presentations, even keynotes.

Conclusion

In an era of uncertainty in the meetings industry, the fundamental value of employing paid professional speakers is being re-examined like never before. We conclude this process more firmly convinced than ever that expertise is important now and will continue to rise in importance for success in this profession. *Expertise is the critical component of the value proposition that the professional speaker brings to the platform.* We have attempted to raise awareness of expertise, expose you to research in the field, and promote subject matter mastery in the speaking profession with this white paper. We offer these suggestions for your review and scrutiny. Our belief is that we all need to improve our effectiveness and raise the reputation of our brand with organizations and individuals increasingly oriented toward pragmatic results.



Appendix A: Additional Research on Expertise

How Experts Think

A great deal of research has investigated how experts organize, retrieve, evaluate and apply their knowledge. As compared to non-experts, experts have more knowledge, organized in ways that make it accessible quickly. They are more accurate and work with more ease. They recognize linkages within the knowledge base, comprehend and accurately assess problems. They sort, identify and analyze the essential contingencies with precision and proficiency.³

As for problem solving, the expert spends proportionally more time building up a basic representation of the problem before searching for a solution. Experts demonstrate a wide repertoire of approaches to problems. Experts look for causes, generate assumptions, select evaluation criteria, list relevant information, eliminate irrelevant information and hypothesize descriptions. (Novices head straight for solution of the problem.)

How Expertise is Measured and Validated

In some fields, expertise is validated by easily measurable results. For example, expert chess players play faster and win more games than non-experts. The more complex the area, the more difficult expertise is to measure. Following are some measures that have been proposed by various researchers and the problems with them:

- Social Acclamation—"Experts are people who other experts in the field say are experts." Besides being circular, the problem with this approach is that someone who is at the cutting edge often is unpopular or rejected by peers.
- Internal Consistency—"Experts' judgments should be internally consistent across cases." Although this may be a necessary measure, it is not sufficient, as someone can be internally, consistently wrong.
- Consensus Reliability—"Experts are 'right' because they make the same judgments as other experts." This is circular argument to the extreme.⁴

There is nothing wrong with using these as secondary characteristics of expertise; they just don't prove expertise.

³ Glaser & Chi, 1988; Chase & Simon, 1973; Chi, Feltovich, & Glaser, 1981

⁴ Shanteau, Weiss, Thomas & Pounds, "Performance-based assessment of expertise: How to decide if someone is an expert or not," *European Journal of Operational Research*, <http://www.ksu.edu/psych/cws/pdf/ejor.pdf>



How Teaching Expertise is Measured

One study we examined looked at students' scores on standardized tests. Another used a metric called "SOLO," in which students' written papers were reviewed on a four-point scale for the depth of their understanding.⁵

To be certified by the National Board for Professional Teaching Standards, teachers are individually assessed by expert teachers in three ways:

1. They come to an assessment center for half a day and are given six topics to "teach" to a teacher in their field of expertise.
2. They submit a portfolio for two teaching topics with lesson plans, teaching resources, student exercises, learning assessments and student evaluations.
3. They provide two videotapes of 15 to 20 minutes, each demonstrating specified skills in the classroom.

For all three of these assessments, there are voluminous and specific metrics that must be met to prove content and pedagogical expertise. (The standards do not attempt to assess performance expertise on the grounds that "there is no one right way to teach.") This program is fully detailed on the Board's Web site.⁶ It should be noted that this program, and others like it around the world, is under attack by teachers who believe that the most important factors in good teaching are passion and enthusiasm.⁷

Industry Research

The following table compares the requirements for certified legal specialists (in California), CSP and CMC.

Requirement	Legal	CSP	CMC
Hours of education	JD+45 special hours	32 in NSA	BA degree
Continuing education	yes	yes	no
Years of experience	5	5	5
Written exam	yes	no	yes
Minimum # clients	50	100	6
Written references	9	20	6
Verbal references	no	no	yes
Peer interview	no	no	yes
Post-cert. practice	yes	no	yes

⁵ Bond, Smith & Baker, "Preliminary Analysis Report: Construct Validity Study of the National Board for Professional Teaching Standards," <http://www.ericsp.org/pages/digests/hattie.pdf>; Stone, "The Value-Added Achievement Gains of NBPTS-Certified Teachers in Tennessee," <http://www.education-consumers.com/briefs/stoneNBPTS.shtm>

⁶ http://www.nbpts.org/standards/stds.cfm#stand_dev_a

⁷ See, e.g., Quality Learning, at <http://www.leading-learning.co.nz/newsletters/vol01-no06-2002.html>



The Rewards of Expertise

Throughout this white paper we've emphasized the rational reasons to develop, enhance and leverage expertise to improve a speaker's business. But being an expert is more than merely intellect, acquisition of knowledge, measurement vs. standards and recognition of marketing advantages. Expertise has other payoffs, as outlined in the following points from our committee colleague, Alan Weiss, CMC, CSP. He proposes that expertise is present and strong when an individual emotionally and psychologically:

1. Regularly and spontaneously creates projects, speeches and other interventions that utilize various permutations and variations of the expertise.
2. Demonstrates outright zeal and joy when engaged in the pursuit, elevation and communication of the expertise.
3. Feels elated, rather than drained, after being challenged about the subject matter.
4. Equates the expertise with the overused term, "authenticity." That is, "this subject matter *is* me."
5. Sparks others and subsequently triggers motivation through sheer enthusiasm.
6. Rapidly develops and evolves the expertise; is motivated to create sharp learning curves.
7. Is drawn "magnetically" to the subject area; making it hard to disengage or omit it from thought.
8. Steadfastly believes and evangelically persuades that it is in the best interests of others to share in the pursuit, skill or topic.
9. Feels frustration when the skill can't be applied or can't be understood by others.
10. "Retreats" to the expertise for solace, reinvigoration, comfort and self-worth.

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