

FIELD GUIDE TOOL #7

The Expertise Self-Assessment

Chapter 7: Expertise Is Not Intelligence

TOOL
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DATE _____ COMPLETED BY _____

SITUATION _____

Use this tool to establish a baseline across the five dimensions of organizational expertise before working through Chapters 8 through 12. Rate yourself honestly on current practice, not aspiration.

When to use it. Best used before working through Part Two and as a quarterly calibration.

Section A: Current Contribution Profile

For each statement, rate how accurately it describes your current mode of contribution on a scale of 1 to 5: 1 = Rarely true, 2 = Occasionally true, 3 = Sometimes true, 4 = Often true, 5 = Consistently true.

Statement	Score (1–5)
When a problem repeats, I trace it to a structural cause before responding.	
The metrics I review regularly change my behavior when they move.	
I have a structured approach to decisions I make when information is incomplete.	
My team has a regular rhythm for reviewing what is working and adjusting accordingly.	
When I make a strategic tradeoff, I can articulate explicitly what I am choosing not to do and why.	
My contribution to the organization's capability does not depend on my personal presence.	

Section B: The Intelligence-Expertise Gap

These questions surface the specific ways intelligence may be substituting for structural expertise.

Question	Your honest answer
What decisions in your organization require your personal involvement to reach a good outcome?	
Which of those decisions could be made as well without you if the right structure existed?	
Where does your team defer to your judgment rather than applying a framework of their own?	
What structural improvements have you been meaning to build but have not yet prioritized?	
In which of the five expertise dimensions do you compensate most with intelligence rather than structure?	

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Section C: The Five Dimensions Baseline

Rate your current organizational practice in each dimension on a scale of 1 to 5: 1 = Ad hoc / no consistent practice, 2 = Emerging / occasional application, 3 = Inconsistent / applied in some areas, 4 = Mostly systematic, 5 = Systematically designed and consistently applied.

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Dimension	Current rating (1–5)	Most important gap to address
Systems thinking: diagnosing structural causes before individuals		
Metrics governance: measuring what governs decisions		
Uncertainty judgment: structured approaches to incomplete information		
Operating cadence: embedded learning rhythms		
Executive calibration: explicit tradeoff reasoning		

Priority Focus

Based on your self-assessment, identify where to concentrate your development effort.

Question	Your answer
Which dimension has the lowest current rating?	
Which dimension, if improved, would have the greatest impact on your organization's performance?	
Which chapter in this section will you read most carefully?	
What specific structural improvements will you commit to making during this section of the book?	

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Before moving to Chapter 8, confirm:

- ☐ You have rated yourself honestly across the six contribution profile statements.
- ☐ You have identified which decisions in your organization depend on your personal judgment rather than structural design.
- ☐ You have rated your current practice across all five expertise dimensions.
- ☐ You have identified your highest-priority development focus for Part Two.