

Moving from Technical Competence to Leadership

How finance professionals can turn expertise into influence, sound judgement and meaningful organisational impact.

LEADERSHIP • INFLUENCE • PROFESSIONAL GROWTH



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“Technical competence earns credibility. Leadership turns that credibility into collective progress.”

The leadership transition

Professional success often begins with technical competence. We learn standards, costing methods, controls, taxation, analysis and reporting. Accuracy builds trust, and disciplined work creates credibility. Yet a point arrives when technical answers alone are no longer enough.

As responsibilities grow, the questions change. Can we influence a decision without relying on authority? Can we explain complexity in simple language? Can we develop people, navigate disagreement and remain steady when the information is incomplete?

Leadership begins when expertise is used in service of a wider purpose. It is the shift from completing one's own work well to enabling a team and an organisation to perform better. For CMAs, this means connecting financial insight with strategy, operations, people and responsible value creation.

What changes at the next level

- From providing information to shaping the quality of decisions.
- From solving every problem personally to building the capability of others.
- From protecting a functional viewpoint to advancing the organisation's purpose.
- From speaking mainly in technical language to creating clarity and commitment.

Four shifts that define professional leadership

The transition is not a rejection of technical skill. It is an expansion of it. Expertise remains the foundation, but leadership determines how effectively that expertise travels through the organisation.

1. From answers to judgement

Technical work often seeks a correct answer. Leadership deals with choices in which data is incomplete, priorities conflict and every option has consequences. A leader frames the decision, distinguishes facts from assumptions, tests scenarios and makes the trade-offs visible. The goal is not to display certainty; it is to improve the quality and integrity of the decision.

2. From reporting to business partnership

A technically strong professional explains what happened. A business partner also explores why it happened, what may happen next and what action is required. This demands curiosity about customers, operations, technology and people. Finance leaders earn influence when colleagues experience them as commercially aware partners—not as a department that appears only to approve, reject or correct.

3. From expertise to influence

Authority can secure compliance, but lasting leadership requires influence. Influence grows through credibility, empathy, preparation and an understanding of stakeholder interests. It involves listening before recommending, adapting the message to the audience and creating space for constructive disagreement. People are more likely to act on analysis when they understand both its logic and its relevance.

4. From individual output to collective capability

The expert is often rewarded for being the person with the answer. The leader must resist becoming a permanent bottleneck. Leadership means setting clear expectations, delegating meaningful responsibility, giving timely feedback and helping others learn to think independently. The true measure of development is not how indispensable the leader becomes, but how capable the team becomes.

Leadership lens: Your value is no longer measured only by the quality of your own work, but also by the clarity, confidence and capability you create around you.

The Practices That Build Trust

5. Communicate for action

Leadership communication is not the transfer of every available detail. It is the disciplined creation of understanding. Begin with the decision or issue, explain the few facts that matter, identify the implications and make the recommended next step explicit. A strong presentation is measured less by how much the speaker knows than by what the audience can understand and do afterwards.

6. Lead through questions

Technical experts can be quick to diagnose and prescribe. Leaders also ask questions that improve thinking: What problem are we really solving? What assumption would change our conclusion? Who is affected but absent from this discussion? What could make this plan fail? Questions create ownership, reveal risk and help teams reach conclusions they can defend.

7. Navigate change and disagreement

Change produces uncertainty, and disagreement is not automatically resistance. Leaders acknowledge legitimate concerns, separate interests from positions and keep the conversation anchored in purpose and evidence. They communicate what is changing, what is not changing and how success will be judged. Calm consistency is particularly important when a transformation affects roles, systems or established ways of working.

8. Protect ethics and professional courage

Leadership becomes visible when pressure is high. Finance professionals may face demands to soften a message, overlook a control or prioritise a short-term target over long-term value. Technical rules provide a boundary, but leadership requires the courage to raise concerns early, document judgement, propose responsible alternatives and remain respectful under pressure. Trust, once compromised, is difficult to rebuild.

Core leadership capabilities

- **Self-awareness:** recognising strengths, triggers, biases and impact on others.
- **Business acumen:** understanding how the organisation creates and protects value.
- **Emotional steadiness:** remaining thoughtful when pressure, ambiguity or conflict rises.
- **Talent development:** coaching people to exercise judgement, not merely follow instructions.
- **Accountability:** making ownership, expectations and consequences clear.

Turning Competence into Leadership

Leadership is not a promotion that happens on one date. It is a pattern of choices that can be practised in any role. The following actions make the transition visible and measurable.

Step 1: Expand the definition of your role

Continue to deliver accurate work, but ask what decision the work supports and who depends on it. Learn the operating context behind every report. Replace 'My task is complete' with 'Has the intended outcome been achieved?' This simple change moves attention from activity to value.

Step 2: Practise executive communication

Summarise a complex issue in one page or three minutes: context, insight, implications and recommendation. Prepare for the questions a decision-maker will ask. Use plain language without losing precision. Communication improves through repeated practice, feedback and careful observation of the audience.

Step 3: Lead one cross-functional problem

Volunteer for an issue that cannot be solved by finance alone—a working-capital bottleneck, process delay, pricing challenge or control weakness. Map stakeholders, define the shared outcome and coordinate action. Cross-functional work teaches influence, negotiation and the reality that different teams may view the same problem differently.

Step 4: Develop another person

Choose one colleague or student to support through regular conversations. Agree on a capability to develop, provide a meaningful assignment and ask reflective questions before offering the answer. Good coaching combines high standards with psychological safety: people should feel able to ask, experiment, learn and take responsibility.

Step 5: Build a personal leadership review

At the end of each month, examine one decision, one conversation and one team outcome. What did you intend? What impact did you have? What would you repeat or change? Seek candid feedback from people above, beside and below you. Leadership grows when reflection becomes a disciplined habit.

Closing thought: Expertise may make you the person others consult. Leadership makes you the person who helps others see clearly, act responsibly and become stronger.

Suggested closing

Technical competence will always matter. It is the foundation of professional credibility. But leadership asks us to go further: to translate knowledge into judgement, judgement into action and individual action into collective progress. We do not need to wait for a title to begin. Every clear conversation, courageous decision, thoughtful question and act of development is already a step into leadership.

Source note: Prepared as a professional-development article for CMA students and members.