

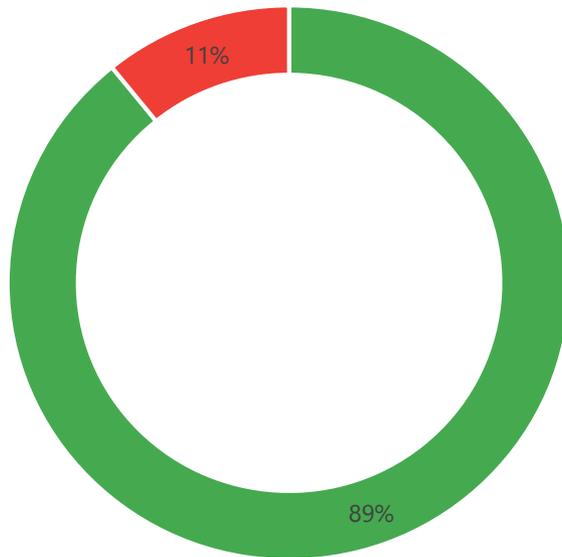
How to Use Standard Competency Models to Accelerate Learning Transfer

Presented By:
Cheryl Lasse, SkillDirector



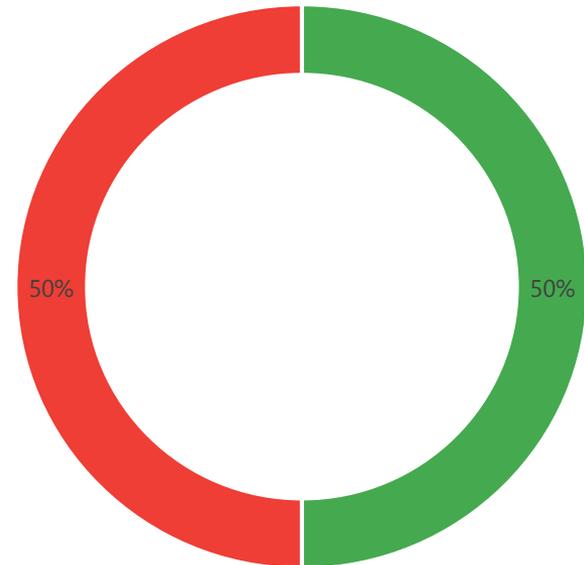
What do your organizations expect?

Does your organization expect employees to own their development and career planning?



■ Yes ■ No

Do you use competency models to drive professional development?



■ Yes ■ No

iCompetency: 3 steps to get employees to own their development and career planning

1

Create a competency model

2

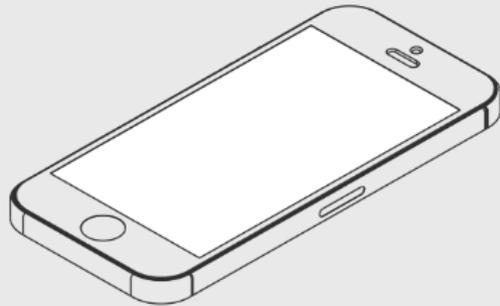
Make it actionable

3

Accelerate learning transfer

Word cloud

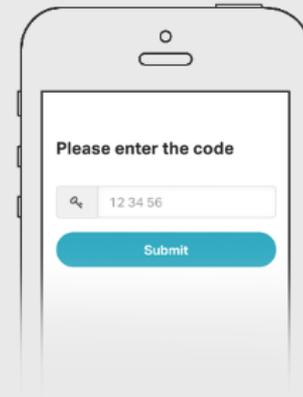
Go to **www.menti.com** and use the code **95 47 24**



1 Grab your phone

www.menti.com|

2 Go to **www.menti.com**



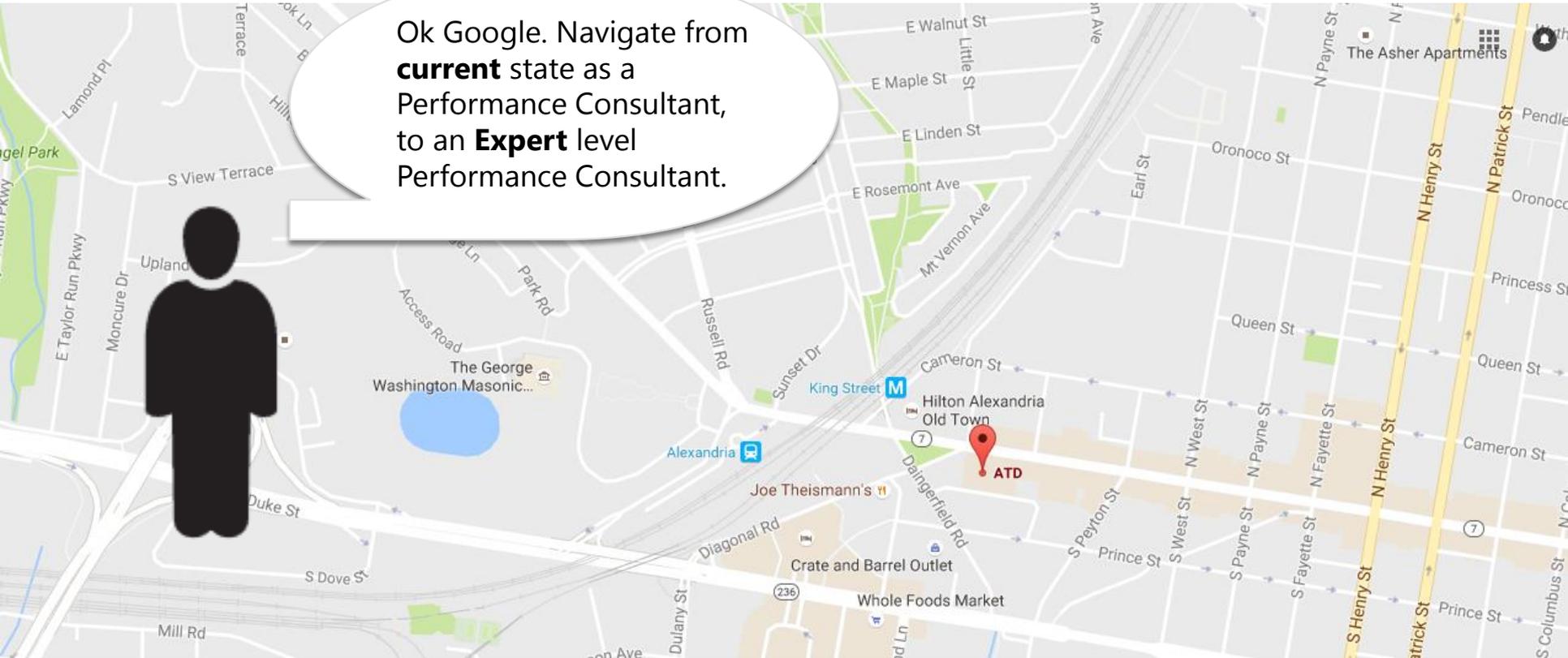
3 Enter the code
95 47 24 and vote!

**A competency model describes
what it looks like to be great in
your role**



Competency Models

Ok Google. Navigate from **current** state as a Performance Consultant, to an **Expert** level Performance Consultant.

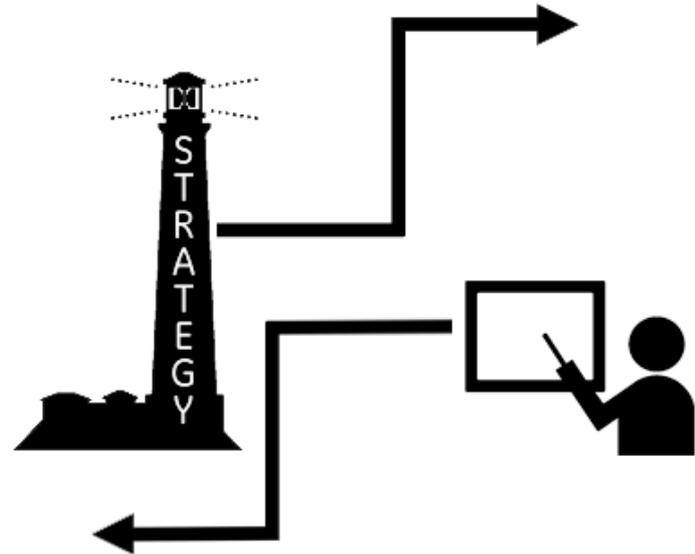


Competency Models

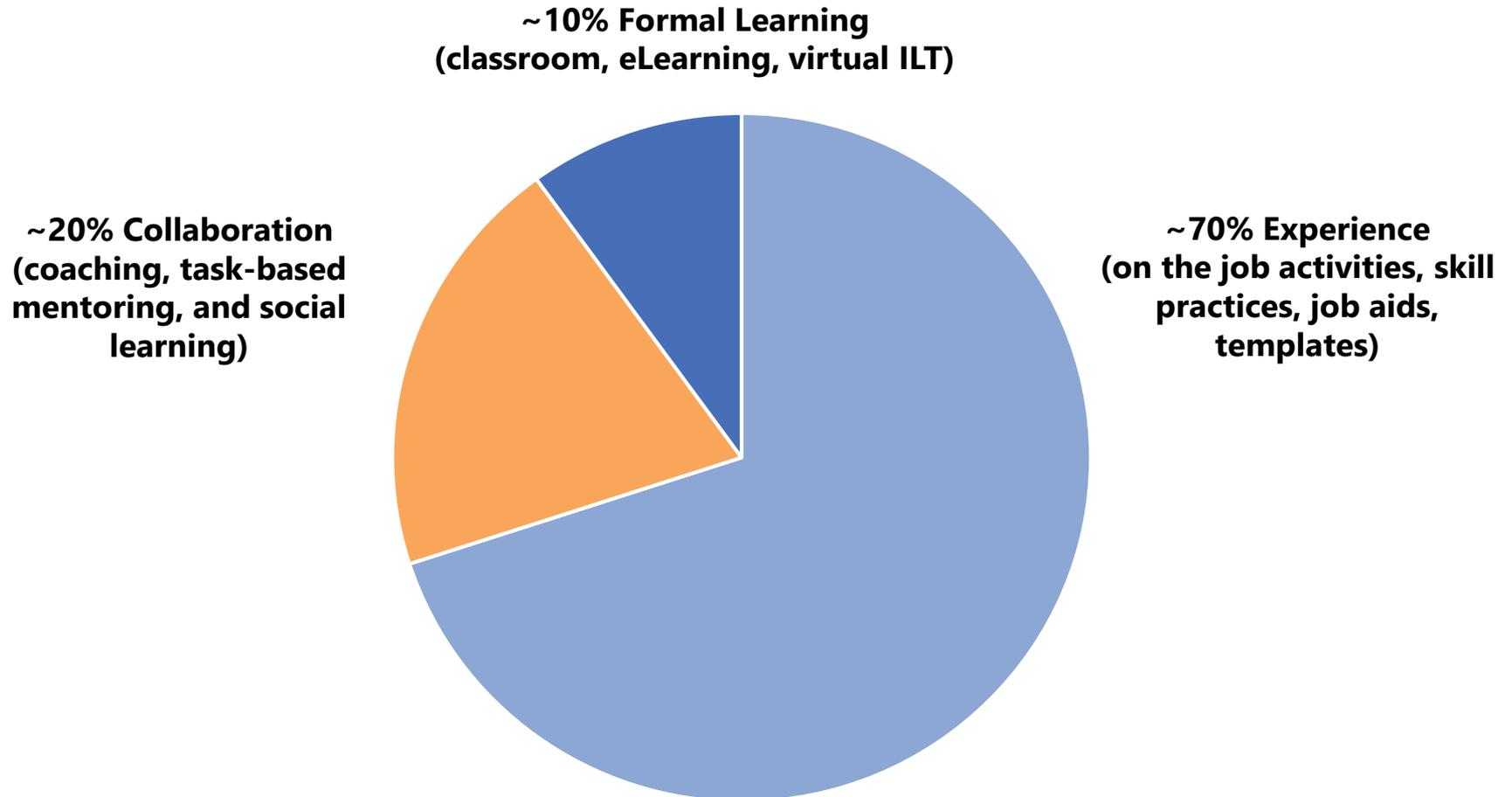


The competency model for each role defines the skills required to accomplish the strategy

How can you develop what your audience needs if you don't know what skills they should have?



Definition: Learning Opportunities



1) Create a competency model



3 easy ways to get one

- ⚙ You can build your own custom model
- ⚙ Others can build a custom model for you
- ⚙ You can use a standard model

Webinar: [How to create an actionable competency model in weeks!](#)

LinkedIn Group: [Competency Models For Professional Development](#)

What a competency model should include

Consistently deliver customer-focused presentations

Communication

Rating	Behavioral Examples
5 - Expert	<ul style="list-style-type: none"> Build templates and tools for enabling customer-focused presentations, capturing the motivation, needs and requirements of stakeholders <ul style="list-style-type: none"> Stakeholder profiles Lists of discovery questions Anticipate objections and proactively overcome them with data before the objection arises Craft a persuasive argument on-the-fly to neutralize dissenters Display Skilled behaviors
4 - Skilled	<ul style="list-style-type: none"> Use a structured technique for enabling customer-focused communication <ul style="list-style-type: none"> Use discovery question lists Document profiles of each stakeholder, and update them as new insight is obtained Perform thorough research before building any presentation Anticipate objections Often able to sway others to a strategy that can overcome higher short term costs with more long term benefits Coach others on how to prepare and deliver customer-focused presentations Display Applied Knowledge behaviors
3 - Applied Knowledge	<ul style="list-style-type: none"> Use a customer-focused approach to presentations Research the role and background of stakeholders before the presentation <ul style="list-style-type: none"> Ask probing, open-ended questions about their needs Ask "why?" Talk to peers about stakeholder motivations, needs and requirements Ensure every presentation has a purpose and delivers value to the recipient(s) Plan presentations to weave supporting data throughout to support recommendations and timing considerations Can prepare a concise, motivating and persuasive presentation <ul style="list-style-type: none"> Use clear and concise communication (e.g., bullet points, summaries, etc.) Emotional/inspiring visuals that support my message
2 - General Awareness	<ul style="list-style-type: none"> Use proper grammar and spelling in presentations Proof my work before delivering Can prepare a complete, logical presentation Gather appropriate supporting data <ul style="list-style-type: none"> Have supporting available should the need arise – it's presented as support
1 - Limited Awareness	<ul style="list-style-type: none"> Focus on the speed of preparing a presentation, more than the quality Am great at "winging it" – can deliver a presentation without much preparation

Tasks/skills grouped into competencies or task categories

Behavioral examples that show what each skill or task looks like at various levels of proficiency

A target level of proficiency

Map learning opportunities to skills in model

Behavioral Example	Learning Opportunity
<ul style="list-style-type: none"> • Use a customer-focused approach to presentations 	Customer Focus class
<ul style="list-style-type: none"> • Research the role and background of stakeholders before the presentation <ul style="list-style-type: none"> ○ Ask probing, open-ended questions about their needs ○ Ask “why?” ○ Talk to peers about stakeholder motivations, needs and requirements 	Skill practice: Identify the needs and motivation of presentation participants
<ul style="list-style-type: none"> • Ensure every presentation has a purpose and delivers value to the recipient(s) 	Skill practice: Identify the needs and motivation of presentation participants
<ul style="list-style-type: none"> • Plan presentations to weave supporting data throughout to support recommendations and timing considerations 	Checklist: planning an effective presentation
<ul style="list-style-type: none"> • Can prepare a concise, motivating and persuasive presentation <ul style="list-style-type: none"> ○ Use clear and concise communication (e.g., bullet points, summaries, etc.) ○ Emotional/inspiring visuals that support my message 	Creating Effective Presentations class

The skill defines the terminal learning objective
 The behavioral examples for the target proficiency represent the enabling learning objectives

What a competency model should include

Creativity: Knowledge of the approaches, tools, and techniques for promoting creative, original thinking and ability to apply it to a variety of business situations

Individual Competency

Tasks/skills grouped into competencies or task categories

Rating	Behavioral Examples
5 - Expert	<ul style="list-style-type: none"> Direct creativity toward effective implementation of business solutions Promote an environment that encourages patience and learning from failures Create a climate that cultivates imagination, new ideas, and experimentation Monitor the industry for creative ideas and solutions that can be used internally Position setbacks or failures as learning opportunities Champion new initiatives within and beyond scope of position
4 - Skilled	<ul style="list-style-type: none"> Maintain balance between innovation and pragmatism Challenge accepted ways of operating Monitor innovations in field and explore usefulness in own function Encourage, solicit, and reward imaginative ideas Support experimentation and accept occasional setbacks or failures Find new ways to approach problems
3 - Applied	<ul style="list-style-type: none"> Share ideas and am open to other opinions and views Analyze own assignments and work environment for creative changes Exhibit interest in new ideas and experimentation Contribute to and encourage new ideas; build on suggestions Explore possibilities and their viability
2 - General	<ul style="list-style-type: none"> Explain organizational incentives and rewards for innovation Describe the process for researching creative ideas List features of an environment conducive to creativity Demonstrate fresh and compelling ideas in own work
1 - Limited	<ul style="list-style-type: none"> Do not display General behaviors

Behavioral examples that show what each skill or task looks like at various levels of proficiency

A target level of proficiency

Training Activity Description

Participate in Brainstorming Sessions: Find out who is running a brainstorming session. Sit in and observe methods used and results obtained. The training function should be a good source for materials on brainstorming techniques as well as who is applying them.

Mapped learning opportunities

Components of custom and standard models

Custom	Standard
A list of skills or tasks someone in that role should be able to do, grouped into competencies or task categories	A list of skills or tasks someone in that role should be able to do, grouped into competencies or task categories
A list of behavioral examples that show what each skill or task looks like at various levels of proficiency, so a person can assess themselves consistently and accurately	A list of behavioral examples that show what each skill or task looks like at various levels of proficiency, so a person can assess themselves consistently and accurately
A target level of proficiency for each skill or task	A target level of proficiency for each skill or task
	Mapped learning opportunities, mostly experiential, representing the "70" in the 70-20-10 model

When to use a custom vs. standard model?



- ⚙ Is there a standard model available for the role?
- ⚙ Is the job unique within your organization?
- ⚙ Does this job provide your organization with competitive advantage?

Custom vs. Standard

- ⚙ Is there a skill that is performed uniquely?
- ⚙ Are there unique technical skills or product-specific knowledge required?

Components of a Standard Competency Model



Job Title	Category	Task/Skill	Task Example
Human Resources Manager	Management Competencies	Performance Management: Knowledge of successful performance management techniques and ability to apply organization's performance management system, practices, and tools to developing and improving individual, team, and organizational performance.	view
Human Resources Manager	Management Competencies	Staff and Career Development: Knowledge of available internal and external learning resources and ability to address learning, training, and career development needs of individuals, teams or organization.	view
Human Resources Manager	Management Competencies	Staffing, Hiring, Selection: Knowledge of human resource acquisition policies and ability to participate in the process of recruitment of permanent and contract personnel, achieving optimal match between candidate and position.	view
Human Resources Manager	Technical - Human Resources	HR: Trends and Direction: Knowledge of Human Resources (HR) basic methodology and emerging trends and ability to apply information from the marketplace, developments and trends related to HR functions in various environments.	view
Human Resources Manager	Technical - Human Resources	HR: Policies, Standards and Procedures: Knowledge of human resource function and ability to uphold the organization's and industry's standards, procedures and policies regarding human resources management.	view
Human Resources Manager	Technical - Human Resources	Employee Relations: Knowledge of the rights and obligations in the employee and employer relationship and ability to adhere to legal requirements when handling employee negotiations.	view

Components of a Standard Competency Model

Staff and Career Development: Knowledge of available internal and external learning resources and ability to address learning, training, and career development needs of individuals, teams or organization

Instructions

Use this list to identify which level of proficiency best describes your behavior relative to this task.

Rating	Behavioral Examples
5 - Expert	<ul style="list-style-type: none"> · Champion staff development programs and initiatives in general · Encourage, monitor, and fund development plans that meet the strategic goals · Monitor industry for fresh ideas and methods concerning staff development · Ensure development of critical competencies, particularly in strategic areas · Anticipate changing demands for competencies in synch with changing business need · Ensure staff development is in line with strategic organizational and departmental objectives
4 - Skilled	<ul style="list-style-type: none"> · Determine, plan, and budget for long-term learning and developmental needs · Support and helps arrange rotational assignments within and between teams · Ensure associates understand shared ownership of their development needs and plans · Evaluate completed development in light of its contribution to achievement of business goals · Identify mission-critical competency areas needed to meet business unit objectives · Establish business-driven development plans for individuals, teams, or departments
3 - Applied	<ul style="list-style-type: none"> · Determine individual and team competency requirements, vulnerabilities, and learning needs · Develop learning program for closing own short- and long-term competency gaps · Clarify own career aspirations · Seek opportunities that meet developmental needs of self or associates · Adjust development plans to better serve business needs
2 - General	<ul style="list-style-type: none"> · Access organization's career development and learning resources · Explain organizational policies, practices and resources for staff development · Document own and team's developmental needs · Describe career development concepts
1 - Limited	<ul style="list-style-type: none"> · Do not display General behaviors

Components of a Standard Competency Model

For the skill: Staff and Career Development

Job Description	Target
HR Consultant	3
HR Consultant, Junior	3
Human Resources Director	4
Human Resources Manager	4

Components of a Standard Competency Model

Job Title	Category	Task/Skill	Task Example	Activity Description	Activity Type	Activity Link
Human Resources Manager	Management Competencies	Staff and Career Development: Knowledge of available internal and external learning resources and ability to address learning, training, and career development needs of individuals, teams or organization.	view	Explore Career Development at Local College: Most higher education facilities have a career development center with a variety of information and resources for managing your career.	Activities	
Human Resources Manager	Management Competencies	Staff and Career Development: Knowledge of available internal and external learning resources and ability to address learning, training, and career development needs of individuals, teams or organization.	view	Have Lunch with Your HR Director/Manager: Find out what criteria are used to identify internal candidates. Ask advice on what you can/should do to effectively compete for positions of interest to you.	Activities	
Human Resources Manager	Management Competencies	Staff and Career Development: Knowledge of available internal and external learning resources and ability to address learning, training, and career development needs of individuals, teams or organization.	view	Individual Gap Analysis: Current or Next Job: Compare your current skill and proficiency level to a job or role of interest to you. Look at your gaps and figure which one or two you need to work on to be in a better position to qualify for that job.	Internal References	

How do you use the standard model?



- 1** Export list of skills, behaviors and targets from standard models
- 2** Send to a leader of that department for them to identify any changes

Task/Skill	Task Example Link	Target	In Model?	Updated Target (if applicable)
Staff and Career Development	View	4	Y	

Timeline for building a custom competency model



Wk 1

Monday
Rapid JTA
Workshop

Tuesday
Rapid JTA
Workshop

Wednesday
Rapid JTA
Workshop

Thursday
Identify task
examples

Friday
Identify task
examples

Wk 2

Monday
Identify task
examples

Tuesday
Identify task
examples

Wednesday
Identify task
examples

Thursday
Identify task
examples

Friday
Identify task
examples

Wk 3

Monday
Identify task
examples:
conduct
workshop

Tuesday
Identify task
examples:
polish
output

Wednesday
Perform task
proficiency
analysis

Thursday
Summarize/
present

Friday



Timeline for using a standard competency model



Wk 1

Monday

Export and send
to leaders

Tuesday

Leaders
perform review

Wednesday

Get feedback
from leaders



Thursday

Friday

iCompetency: 3 steps to get employees to own their development and career planning

1

Create a competency model

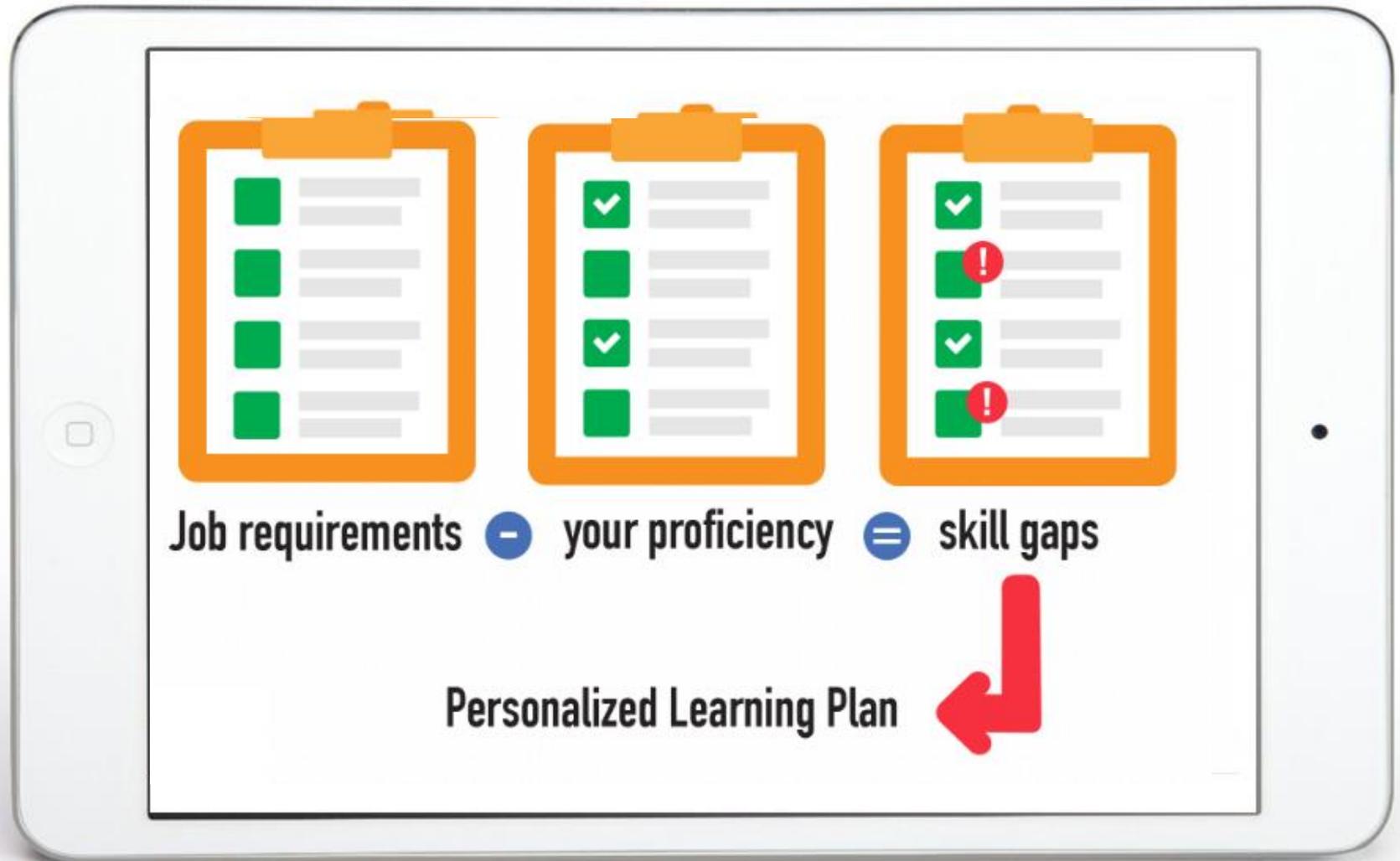
2

Make it actionable

3

Accelerate learning transfer

2) Make your competency model actionable



2) Make your competency model actionable

atd CAREER NAVIGATOR Career Navigator

Hi, Cheryl Logout

Self-Assessment Career Planning Career Navigator Resources

Member Assessment

Help Tutorial

For each task/competency, [click on the \[i\] beside each task to review behavioral examples](#) and then rate your perception of your proficiency. Filter by Competency/Area of Expertise if you only want to assess yourself on a few of them. Click Submit. It is a best practice to save regularly.

Assessment Details
 Assessment Date: 5/23/2016
 Job Title: Specialist - Mid level

Submit Save Cancel

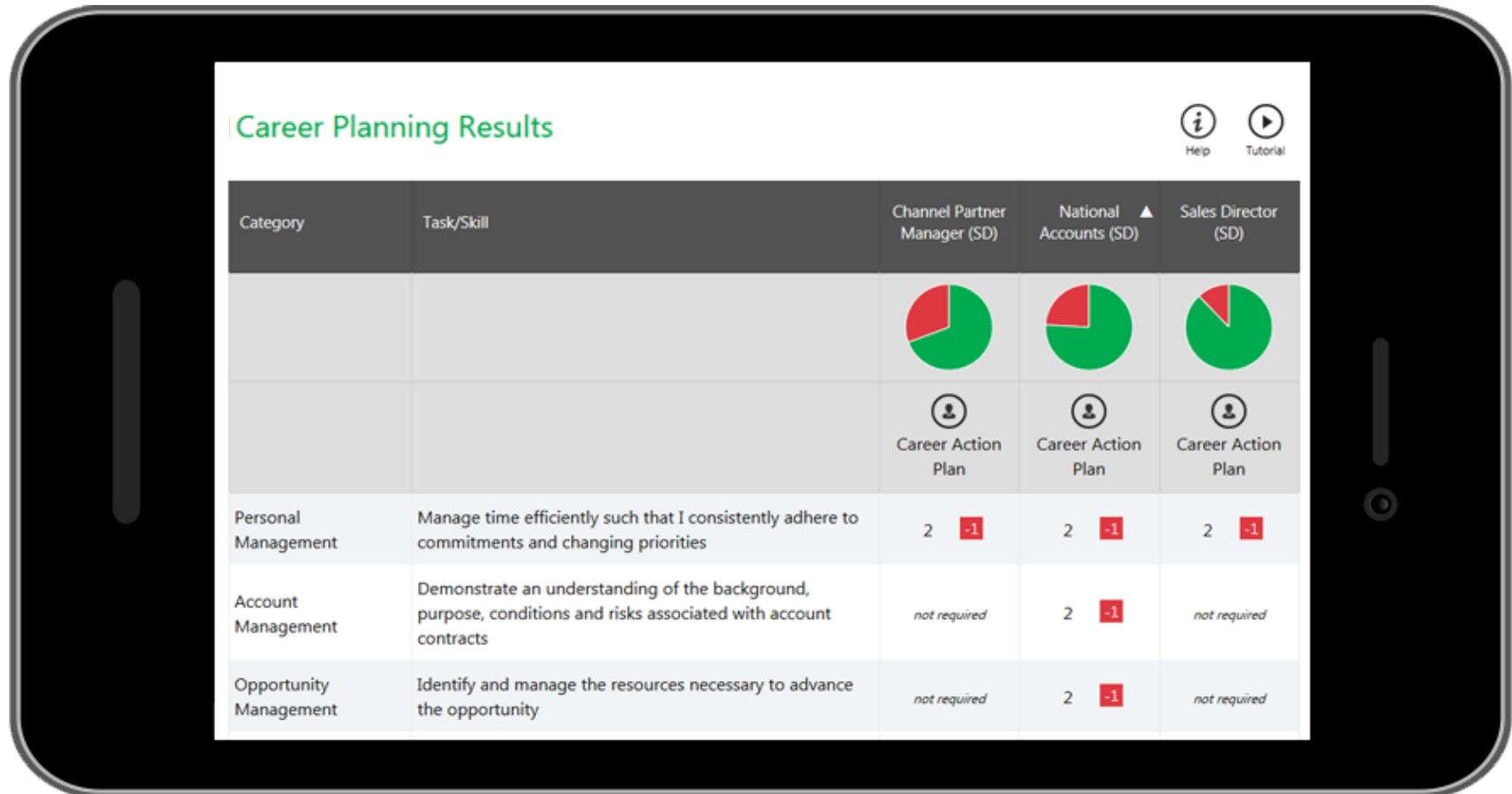
Competency	Task/Skill	N/A	No to Little Proficiency	Limited Proficiency	Consistent Proficiency	Advanced Proficiency	Exceptional Proficiency
Assess if relevant (you may leave blank if N/A)							
Business Skills	Uses data from a variety of sources to analyze needs and proposes solutions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Business Skills	Applies business acumen by building a business case for the organization's learning agenda	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

2) Make your competency model actionable

The screenshot displays the 'The Self-Directed Learning Engine' interface. At the top, it shows the user's name 'Hi, Melissa' and a 'Logout' button. Below this is a navigation bar with links for 'Self-Assessment', 'Career Planning', 'Manager Functions', and 'SDLE Resources'. The main heading is 'Assessment Results: Evaluation Detail', with 'Personalized Learning Plan' and 'Find Mentor For All Gaps' buttons. A search bar shows 'Employee / Job Title' with the text 'Cheryl Lasse / cherylemployee / Account Executive'. The main content is a table with columns for Category, Task/Skill, Task Example, Min Value For Role, Employee Rating, Manager Rating, Blended Rating, Gap Btwn Min & Blended Rating, and Find Mentor.

Category	Task/Skill	Task Example	Min Value For Role	Employee Rating	Manager Rating	Blended Rating	Gap Btwn Min & Blended Rating	Find Mentor
Creating And Closing Opportunities	Develop winning proposals	view	3	1	1	1	-2	view
Creating And Closing Opportunities	Qualify opportunities	view	3	2	1	1.4	-1.6	view
Creating And Closing Opportunities	Build business justification cases	view	3	2	1	1.4	-1.6	view
Creating And Closing Opportunities	Conduct interest-building calls (cold calls) when applicable	view	3	2	2	2	-1	view
Maintaining Accounts	Troubleshoot customer operational	view	3	3	2	2.4	-0.6	view

2) Make your competency model CAREER actionable



3) Accelerate learning transfer

Assessment Results: Personalized Learning Plan

Submit Cancel Evaluation Detail Refresh Activities

Priority	Task/Skill	Activity Description	On Development Plan?	Target Completion Date	Completed?	Activity Type	Activity Link	Status	Hrs
1	Qualify opportunities using a specific methodology	Opportunity Sales Planning (eLearning): Opportunity Analysis	<input type="checkbox"/>		<input type="checkbox"/>	eLearning	view	Active	1
1	Qualify opportunities using a specific methodology	Opportunity Sales Planning (ILT): Opportunity Analysis	<input type="checkbox"/>		<input type="checkbox"/>	Classroom	view	Active	3.5
2	Qualify opportunities using a specific methodology	Spend an hour listening to Inside Sales make calls	<input type="checkbox"/>		<input type="checkbox"/>	Activity		Active	
2	Qualify opportunities using a specific methodology	"Can I Win?" Activity	<input type="checkbox"/>		<input type="checkbox"/>	Activity	view	Active	0.5
	Qualify	List of activities to				Job Aid	view	Active	

Webinar: [How to accelerate learning transfer with competency-based learning](#)
LinkedIn Group: [Competency Models For Professional Development](#)

3) Accelerate learning transfer

70

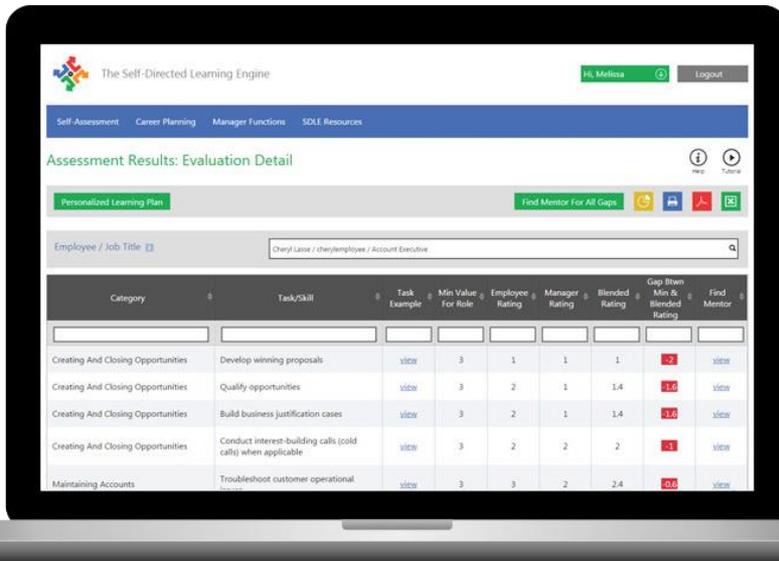
- ✿ If your standard model contains mapped activities, determine which to keep
- ✿ Customize, tailor or add additional ones

Learning Opportunity	Type
Explore Career Development at Local College: Most higher education facilities have a career development center with a variety of information and resources for managing your career.	Activities
Have Lunch with Your HR Director/Manager: Find out what criteria are used to identify internal candidates. Ask advice on what you can/should do to effectively compete for positions of interest to you.	Activities
Individual Gap Analysis: Current or Next Job: Compare your current skill and proficiency level to a job or role of interest to you. Look at your gaps and figure which one or two you need to work on to be in a better position to qualify for that job.	Internal References

3) Accelerate learning transfer

20

- ⚙️ Manager participation makes coaching more effective
- ⚙️ Identify high performers for task-based mentoring
- ⚙️ Map to relevant social learning



Min Value For Role	Employee Rating	Manager Rating	Blended Rating	Gap Btwn Min & Blended Rating	Find Mentor
3	1	1	1	-2	view
3	2	1	1.4	-1.6	view
3	2	1	1.4	-1.6	view
3	2	2	2	-1	view

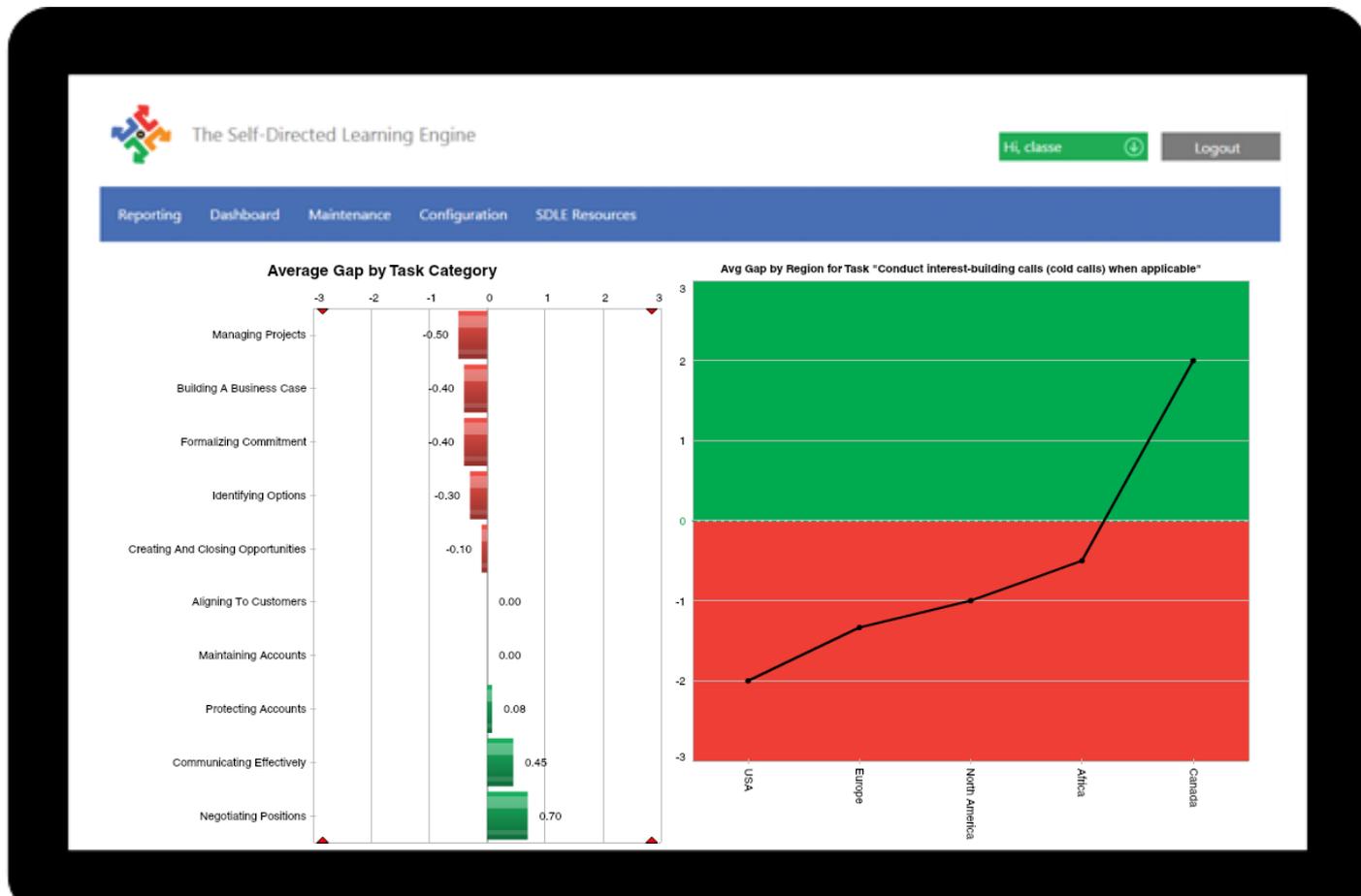
3) Accelerate learning transfer

10

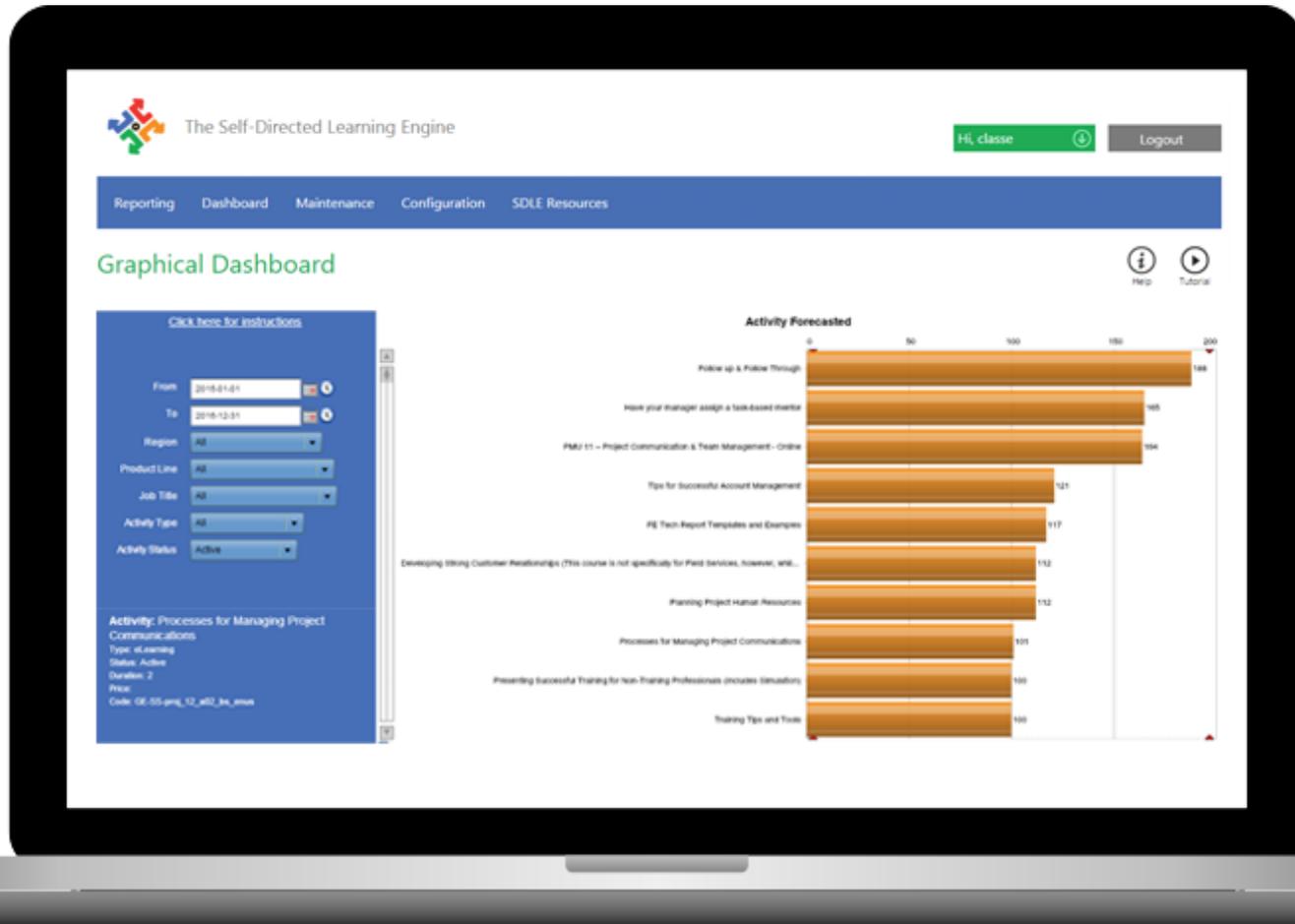
- ⚙ The formal learning you have
- ⚙ Insert placeholders for what you need “to be developed”



Why it's good for you!



Why it's good for you!



Real, automated needs assessment



**Link learning to results,
in skills and outcomes**

Answering your questions

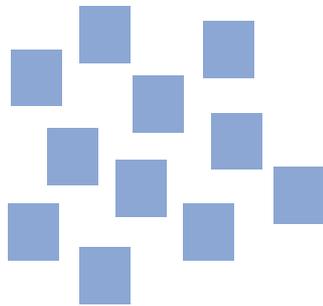
- ✿ How do I get buy in? When is the best time to implement competency models?
- ✿ Can you use competency models for recruiting and hiring?
- ✿ What about for onboarding?
- ✿ How do you communicate with the organization about how to use the competency models?
- ✿ Does accelerated learning transfer necessarily equate to long term behavioral change?
- ✿ What are some best practices for keeping success profiles (competency models/capability models) flexible and updated (and not forgotten on the shelf)?
- ✿ Can we get too detailed in the competency model?



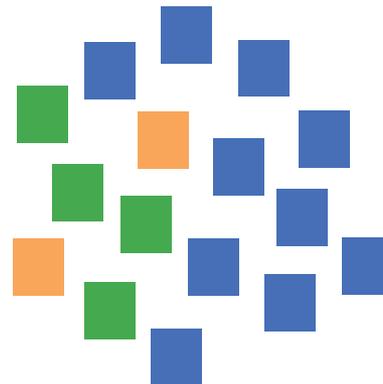
Answering your questions

- * How do you create a competency model for a role that is not clearly defined?
- * How do I make my competency model more results-oriented? How do I ensure the competency model reflects what the business actually needs and values?
- * Does experience = competency?
- * How do I create standards that address needs of different business units with shared development goals?
- * Beyond the frequency of a post training event follow up, what are some tips on developing learning transfer plans?

Skills



Learning Opportunities



3 steps for employees to own their development and career planning

1

Create a competency model

- ✿ When to use a standard model instead of creating a custom one
- ✿ Components of a standard model
- ✿ How to ready your standard model to make it actionable

2

Make your competency model actionable

- ✿ Leveraging technology to make it accessible and assessable

3

Accelerate learning transfer with competency-based learning, leveraging the 70-20-10 framework

- ✿ Employees buy into it, managers support it

Contact Information



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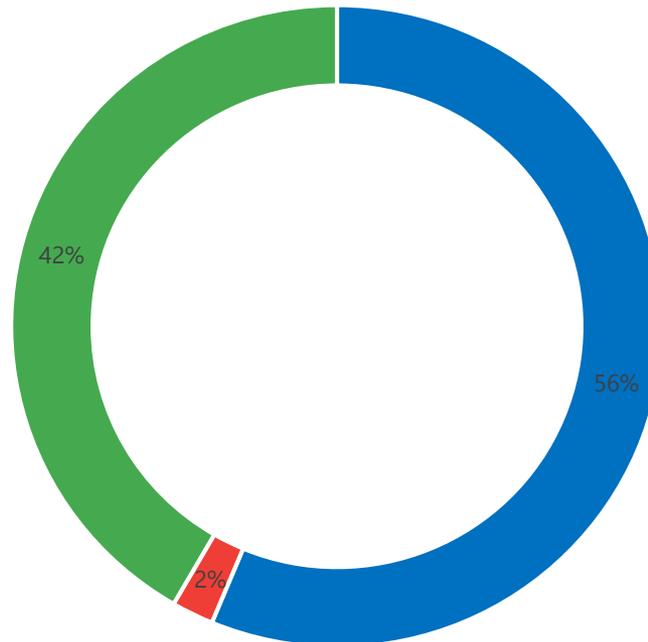
[Link to ATD Career Navigator for members](#)

[Link to ATD Career Navigator for non-members \(temporary\)](#)

[Link to Competency Models For Professional Development LinkedIn Group](#)

What do your organizations expect?

Do you now or do you plan to provide self-directed learning to your team?



■ Build ■ Buy ■ Combination