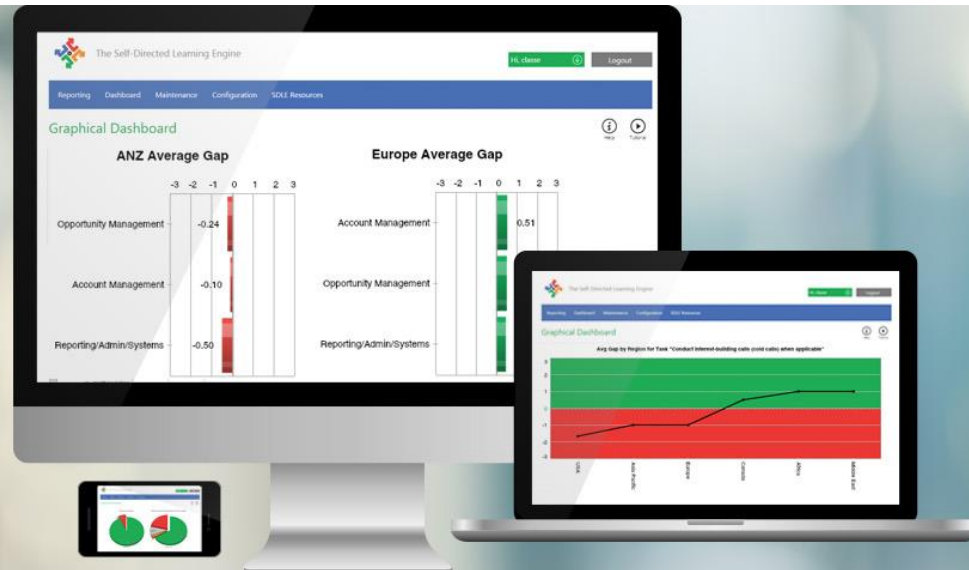


Develop an Actionable Competency Model in Weeks!

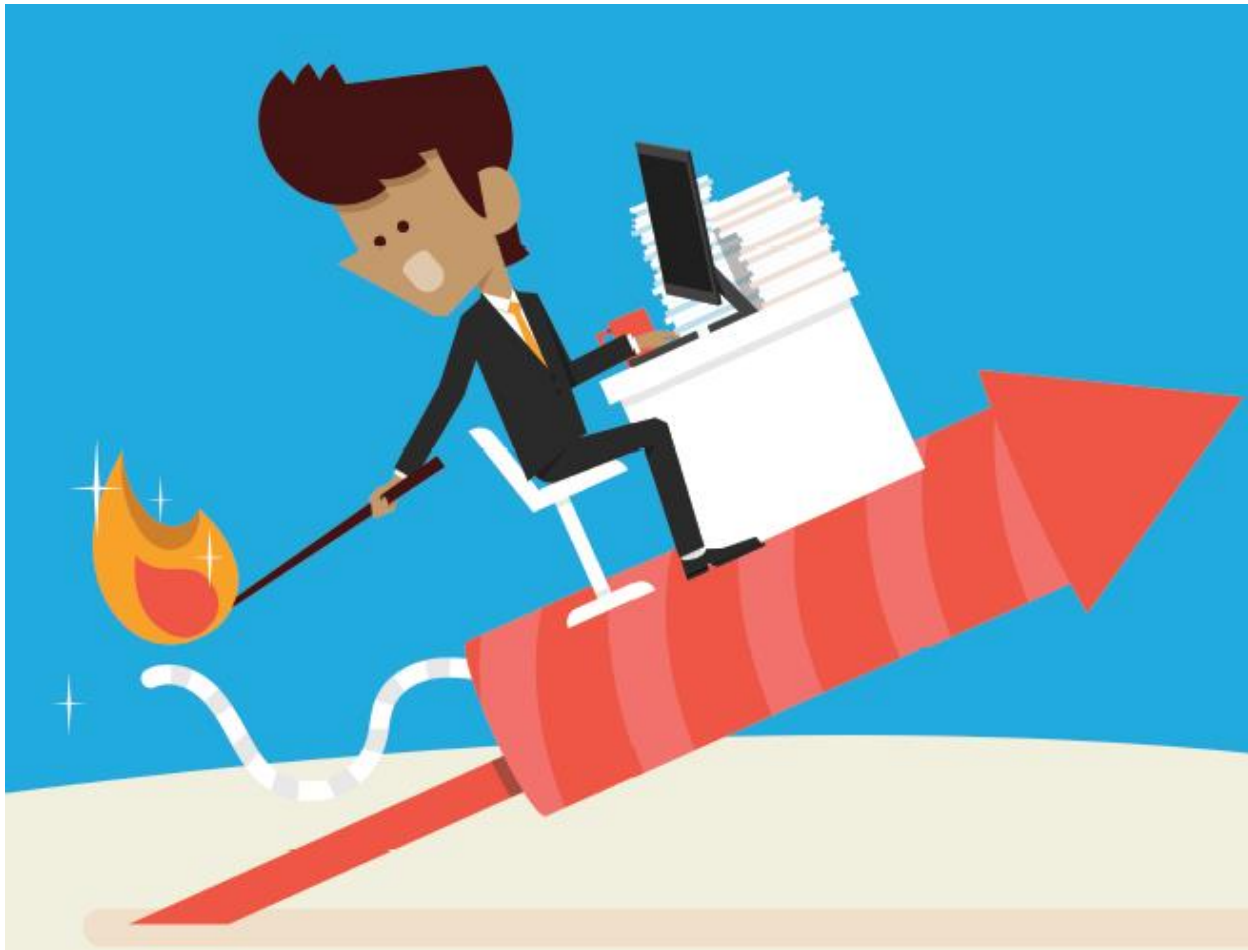


Presented By:
Cheryl Lasse, SkillDirector

Competency Models



Competency Models



<http://skilldirector.com/news/what-is-the-value-of-a-competency-model>

Webcast Objectives

In this webinar you will learn:

- ⚙ Steps to create the competency model, along with templates we'll provide to help you do it
- ⚙ How this process can help you protect the knowledge and best practices of those set to retire
- ⚙ How to make your competency models actionable and strategic

Competency Model Development

1

Conduct a Rapid JTA Workshop

2

Identify Task Examples

3

Perform a Task Proficiency Analysis

Conduct a Rapid JTA Workshop



One day



Facilitator & Recorder



4-6 High performers & 1 Manager

Rapid JTA Workshop Preparation



Rapid JTA Workshop Preparation



[COMPANY's] biggest asset is our people. It is our commitment to ensure our people are highly skilled and have immediate access to the learning tools and resources they need to perform their jobs.

We are partnering with SkillDirector to perform a rapid job task analysis, a process by which we identify those tasks that high performing individuals in their role do to make them high performers. That is, we are trying to model the behavior of high performers so that we can make tools and resources available to others in that role, to help them develop and grow.

To that end, I would like to cordially invite you to participate in a workshop session to gather this data. **We feel that you can offer valuable and significant contributions to this process.** This session will be led by a professional facilitator, who will lead you and your peers through a discovery process, resulting in documentation of the core areas and tasks that are critical for success in your role. SkillDirector will be documenting the tasks, and then associate those tasks to existing and proposed learning materials. Shortly after the Rapid JTA Workshop, you will be provided with a list of behavioral examples that describe each task we defined. You will need to review them and document any additional things and other best practices that make you successful. Then, in the Task Example Workshop, we will review and refine those examples into a final list. As a result of this process, you and your peers will be able to assess yourselves against these job tasks, and self-direct to the development activities which can increase your proficiency and further your goals.

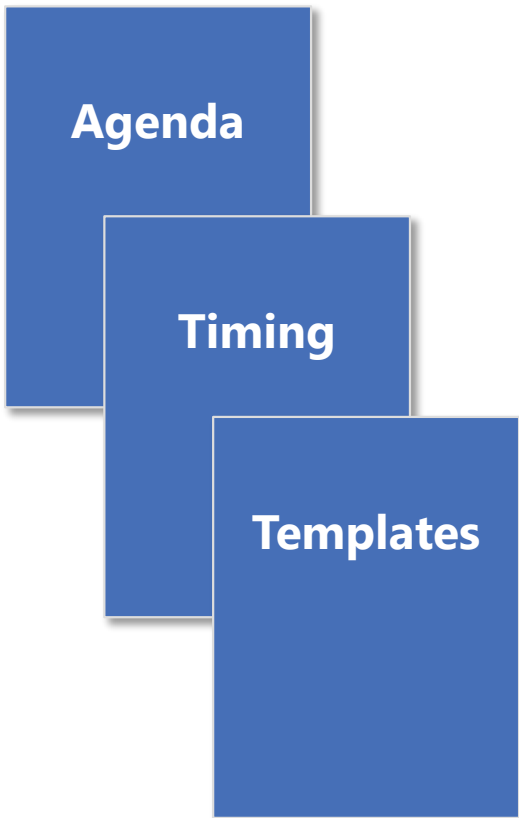
Time commitment:

- 4 hours for the Rapid JTA Workshop, and 15 minutes to confirm the results the following day
- 1-2 hours to review the draft behavioral examples provided (this is critical to success) prior to the Task Example Workshop
- 3-4 hours for the Task Example Workshop to review and discuss collective feedback

Please let me know, as soon as possible, if you are able to attend this Rapid JTA Workshop in [\[LOCATION\]](#) on [\[DATE\]](#), and the Task Example Workshop in [\[LOCATION\]](#) on [\[DATE\]](#).

We look forward to your valuable input in achieving common goals... enabling each member of the team to own their development, and to identify training development and delivery priorities so we can make development opportunities available to those who want and need them.

Rapid JTA Workshop Execution



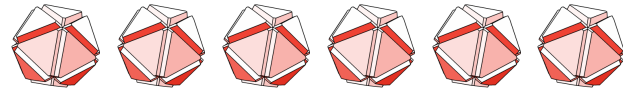
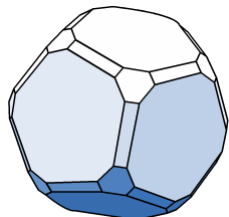
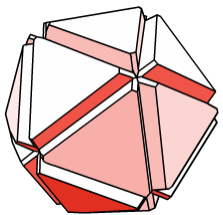
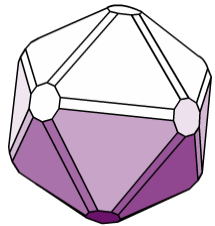
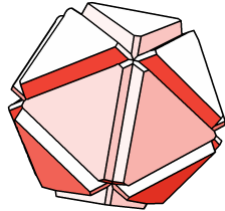
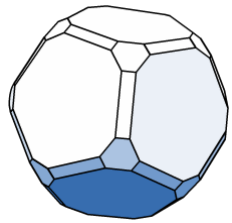
Nominal Group Technique

Rapid JTA Workshop Execution



1) Categories

2) Tasks



Rapid JTA Workshop Execution

- Management
- Customer Relationship Management
- Sales Support
- Project Execution
- Improvements
- Collaborating Internally
- Personal development

Sales Support	Project management	Proposal support
Mentoring	Innovating	Tracking project financials and metrics
Work with engineering	Field Support	Quality/process improvements
Growth strategy	Identify and plan for team training (needs analysis)	Execute projects (doing or managing the work)
Issue resolution/case support	Resource planning/scheduling – project specific Resource planning/scheduling/ Resource utilization	Participate in new product rollouts
Collaborating	Defining operational strategy	Product support strategies and implementation
Customer visits	Development activities	

Rapid JTA Workshop Execution



Job to be Analyzed	
Date	
Location	

Participant Section

Role	Job Title	Name	Location
Participant			
Participant			
Participant			
Participant			
Participant			
Participant			
Observer			
Observer			
Observer			

List of Functional Areas

Project Execution
Management
Customer Relationship Management
Internal Collaboration
Sales Support
Improvement
Personal Development


Rapid JTA Workshop Execution



Functional Area 1: Project Execution			
Task Number	Task Statement	Behavioral Example Notes	Critical To Success?
	Project management Tracking project financials and metrics Field support Issue resolution/case support Execute projects (doing or managing the work) Resource planning/scheduling – project specific		

Rapid JTA Workshop Execution



Critical To Success Themes
Learning Opportunities & Assets Available
How did you learn these skills (formal and informal)? What tools or templates or checklists have you created? Would you share them?

Learning Opportunity Gaps

Rapid JTA Workshop Execution



Functional Area 1: Project Execution			
Task Number	Task Statement	Behavioral Example Metric	Critical to Success?
1	Project management		
2	Project management		
3	Project management		
4	Project management		
5	Project management		
6	Project management		
7	Project management		
8	Project management		
9	Project management		
10	Project management		
11	Project management		
12	Project management		
13	Project management		
14	Project management		
15	Project management		
16	Project management		
17	Project management		
18	Project management		
19	Project management		
20	Project management		
21	Project management		
22	Project management		
23	Project management		
24	Project management		
25	Project management		
26	Project management		
27	Project management		
28	Project management		
29	Project management		
30	Project management		
31	Project management		
32	Project management		
33	Project management		
34	Project management		
35	Project management		
36	Project management		
37	Project management		
38	Project management		
39	Project management		
40	Project management		
41	Project management		
42	Project management		
43	Project management		
44	Project management		
45	Project management		
46	Project management		
47	Project management		
48	Project management		
49	Project management		
50	Project management		

Functional Area 2: Customer Relationship Management			
Task Number	Task Statement	Behavioral Example Metric	Critical to Success?
1	Customer relationship management		
2	Customer relationship management		
3	Customer relationship management		
4	Customer relationship management		
5	Customer relationship management		
6	Customer relationship management		
7	Customer relationship management		
8	Customer relationship management		
9	Customer relationship management		
10	Customer relationship management		
11	Customer relationship management		
12	Customer relationship management		
13	Customer relationship management		
14	Customer relationship management		
15	Customer relationship management		
16	Customer relationship management		
17	Customer relationship management		
18	Customer relationship management		
19	Customer relationship management		
20	Customer relationship management		
21	Customer relationship management		
22	Customer relationship management		
23	Customer relationship management		
24	Customer relationship management		
25	Customer relationship management		
26	Customer relationship management		
27	Customer relationship management		
28	Customer relationship management		
29	Customer relationship management		
30	Customer relationship management		
31	Customer relationship management		
32	Customer relationship management		
33	Customer relationship management		
34	Customer relationship management		
35	Customer relationship management		
36	Customer relationship management		
37	Customer relationship management		
38	Customer relationship management		
39	Customer relationship management		
40	Customer relationship management		
41	Customer relationship management		
42	Customer relationship management		
43	Customer relationship management		
44	Customer relationship management		
45	Customer relationship management		
46	Customer relationship management		
47	Customer relationship management		
48	Customer relationship management		
49	Customer relationship management		
50	Customer relationship management		

Functional Area 3: Sales Support			
Task Number	Task Statement	Behavioral Example Metric	Critical to Success?
1	Sales support		
2	Sales support		
3	Sales support		
4	Sales support		
5	Sales support		
6	Sales support		
7	Sales support		
8	Sales support		
9	Sales support		
10	Sales support		
11	Sales support		
12	Sales support		
13	Sales support		
14	Sales support		
15	Sales support		
16	Sales support		
17	Sales support		
18	Sales support		
19	Sales support		
20	Sales support		
21	Sales support		
22	Sales support		
23	Sales support		
24	Sales support		
25	Sales support		
26	Sales support		
27	Sales support		
28	Sales support		
29	Sales support		
30	Sales support		
31	Sales support		
32	Sales support		
33	Sales support		
34	Sales support		
35	Sales support		
36	Sales support		
37	Sales support		
38	Sales support		
39	Sales support		
40	Sales support		
41	Sales support		
42	Sales support		
43	Sales support		
44	Sales support		
45	Sales support		
46	Sales support		
47	Sales support		
48	Sales support		
49	Sales support		
50	Sales support		



Rapid JTA Workshop Follow Up Activities

Tasks (Original)

- Complete performance reviews
- Conduct informal and formal reviews of employees throughout the year
- Talk to people about their next job role

Polished Tasks

- Drive the development of people on my team

Task Examples

- Complete performance reviews
- Conduct informal and formal reviews of employees throughout the year
- Talk to people about their next job role

Rapid JTA Workshop Follow Up Activities

Send

From: classe@skilldirector.com

To: jsmith@skilldirector.com

Cc:

Bcc:

Subject: IMPORTANT: Feedback requested by November 18, 2015

Thank you for your participation and insight!

Attached is the final task list from our session. We spent a great deal of time refining them to follow the proper task convention. Some items were behavioral examples of other tasks, so they are still in the document, but moved into the Task Example column. < FILE NAME >

Our request, by 5pm Eastern on November 18:

- Review the tasks and task examples and make sure they well represent what we came up with in the session. Track changes is on, so make whatever adjustments you feel are required. We'll be using this document as the input for our next step.
- Either send back this document with your edits, or if you have no edits, send the reply "Confirmed".

We need to start drafting the task examples on Thursday morning. Thank you!

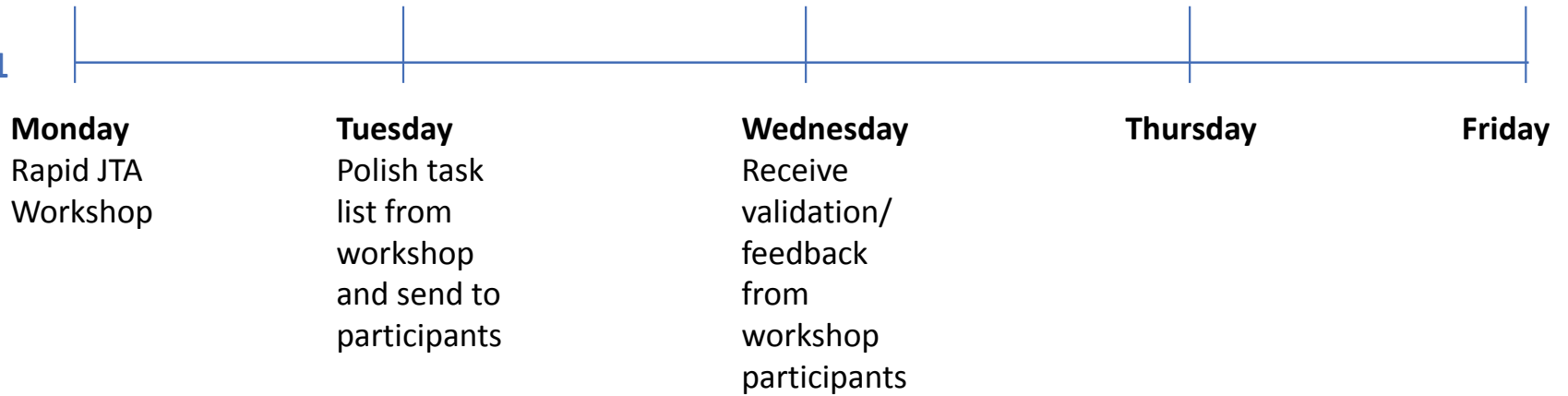
Best regards,
Cheryl

Cheryl Lasse, Managing Partner
SkillDirector / www.skilldirector.com
classe@skilldirector.com / Tel: 407.876.9850 / Cell: 407.222.4849 / Fax: 407.386.3043

Rapid JTA Workshop Timeframe



Wk 1



Identify Task Examples

Category	Task/Skill	Limited Awareness	General Awareness	Applied Knowledge	Skilled	Expert
Aligning To Customers	Build trust through a customer-focused approach and advocacy	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Building A Business Case	Identify clearly the business and financial benefits of a solution in a way that speaks to business impact	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Communicating Effectively	Demonstrate well prepared verbal and written communication and presentation techniques	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Communicating Effectively	Demonstrate timely responses to all inquiries for information within the requested amount of time	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Creating And Closing Opportunities	Research and target prospects	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Creating And Closing Opportunities	Conduct interest-building calls (cold calls) when appropriate	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Creating And Closing Opportunities	Identify sales leads	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Creating And Closing Opportunities	Follow up/manages sales leads	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Demonstrate well prepared verbal and written communication and presentation techniques

Rating	Behavioral Examples
5 - Expert	<ul style="list-style-type: none"> Build templates and tools for enabling customer-focused communication, 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 creating any written communication, or building any presentation Anticipate objections Often able to sway others to a strategy that may have higher short term costs but more long term benefits Coach others on how to prepare and deliver customer-focused communication Display Applied Knowledge behaviors
3 - Applied Knowledge	<ul style="list-style-type: none"> Use a customer-focused approach to communication Research the role and background of stakeholders <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 communication has a purpose and delivers value to the recipient(s) Plan communications to weave supporting data throughout to support recommendations and timing considerations Can prepare a concise, motivating and persuasive presentation Use clear and concise communication (e.g., bullet points, summaries, etc.)
2 - General Awareness	<ul style="list-style-type: none"> Use the proper grammar and spelling in communications Proof my work before sending anything in writing Can prepare a complete, logical presentation Gather appropriate supporting data before discussing with others 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 communication, more than the quality Am great at "winging it" – can deliver a presentation, state my position, or write others without much preparation

Scale Descriptors

Value	Label	Description
5	Expert	Independently develops and applies task/skills/knowledge in new and unique situations and mentors others to become an expert.
4	Skilled	Demonstrates advanced task/skill/knowledge and the ability to teach, coach and supervise others.
3	Applied Knowledge	Applies task/skill/knowledge accurately and independently.
2	General Awareness	Understands basics of task/skill/knowledge and applies with coaching and supervision.
1	Limited Awareness	Limited awareness of task/skill/knowledge; requires development/coaching.
Value	Label	Description
5	Expert	Innovate. Develop and apply task/skills/knowledge in new and unique ways. Create and share expertise and best practices. Create structure. Demonstrate foresight.
4	Advanced	Demonstrate advanced task/skill/knowledge. Apply structure. Demonstrate insight. Coach others.
3	Skilled	Perform task/skill consistently, accurately and independently.
2	Applied	Perform task/skill at a basic level, or perform with coaching and supervision.
1	Learning/Aware	Limited awareness of task/skill/knowledge; requires development/coaching.
Value	Label	Description
5	Strategist	Independently develop and apply task/skills/knowledge in new and unique situations. Provide insight and foresight. Has a numerical value of 5.
4	Expert	Demonstrate advanced task/skill/knowledge and the ability to teach, coach and supervise others. Has a numerical value of 4.
3	Skilled	Apply task/skill/knowledge proactively and independently. Has a numerical value of 3.
2	Applied Knowledge	Apply task/skill/knowledge with others. Has a numerical value of 2.
1	General Awareness	Have basic or general awareness of task/skill/knowledge. Require development/coaching. Has a numerical value of 1.

Task Example

Coach and mentor my team

Rating	Behavioral Examples
5 - Expert	<ul style="list-style-type: none"> • Seek opportunities to coach and mentor outside of regularly scheduled sessions • Create tools and templates that educate and encourage others to become coaches and mentors <ul style="list-style-type: none"> ○ Coaching/mentoring tip sheets ○ Links to coaching/mentoring articles/blogs ○ Recognition idea lists • Spend time at least once a week identifying task-based mentors for others, and coaching them to be better mentors • Assess the improvements of those being mentored • Display Skilled behaviors
4 - Skilled	<ul style="list-style-type: none"> • Proactively seek out opportunities to coach and mentor <ul style="list-style-type: none"> ○ Develop a regular cadence for mentoring and coaching ○ Connect people to other coaches and mentors in other fields of expertise • Spend at least some time out of every day coaching your team • Engage your entire team • Understand that others will elevate their skills by being task-based mentors for those tasks/skills where they are high performers • Display Applied Knowledge behaviors
3 - Applied Knowledge	<ul style="list-style-type: none"> • Coach your team, focusing on underperformers • Find what they can do well and maximize their talent • Utilize high performers to be task-based mentors for others
2 - General Awareness	<ul style="list-style-type: none"> • Coach and mentor upon request • Coach those who appear to be struggling at a particular task • Rarely utilize task-based mentors
1 - Limited Awareness	<ul style="list-style-type: none"> • Coach and mentor others through specific situations/activities • Coach those who ask for help • Never utilize task-based mentors

Task Example Timeframe



Wk 1

Monday

Rapid JTA
Workshop

Tuesday

Polish task
list from
workshop
and send

Wednesday

Receive
validation/
feedback

Thursday

Write task
examples –
level 3

Friday

Write task
examples –
remaining
levels

Wk 2

Monday

Task
example
QA/review
and send to
participants

Tuesday

Participants
review and
edit task
examples

Wednesday

Participants
review and
edit task
examples

Thursday

Participants
review and
edit task
examples

Friday

Participants
provide task
example
feedback &
you
consolidate
edits

Task Examples - Edited

Set priorities and goals for the team/region

Critical to success

Rating	Behavioral Examples
5 - Expert	<ul style="list-style-type: none"> Model the actions/behaviors I expect from my team. <u>Utilize the skills and performance models of best bet employees to motivate and mentor coworkers who may be struggling</u> Obtain buy-in from employees on my team by explaining the rationale behind the priorities and goals <ul style="list-style-type: none"> Maintain an "open door" policy for feedback and ideas Communicate openly with regional team leads <ul style="list-style-type: none"> Obtain insight from regional team leads into issues and potential resolutions Continually ask, "What resources/support can I provide to help the region meet its goal?" Display "lived" behaviors
4 - Skilled	<ul style="list-style-type: none"> Develop improvement plans as soon as I see a performance metric is trending down. <u>Monthly/Weekly based on available performance by objective, metric, territory</u> Obtain buy-in from regional team leads by explaining the rationale behind the priorities and goals Communicate openly with regional team leads <ul style="list-style-type: none"> <u>Monthly/Weekly</u> <ul style="list-style-type: none"> When I learn one that can derail the region from meeting its goal Display "lived" knowledge behaviors
3 - Applied Knowledge	<ul style="list-style-type: none"> <u>Develop "Action/Threats" to monitor team progress</u> Work with team leads to set priorities <ul style="list-style-type: none"> Meet with the team as a whole to communicate expectations When applicable, meet with individuals to communicate roles/responsibilities Work with team leads to develop plans to achieve goals <ul style="list-style-type: none"> Engage team leads to execute those plans Provide support as necessary Continually monitor performance to identify where metrics/goals are not being met <ul style="list-style-type: none"> Work with team leads to develop improvement plans as necessary

Task Proficiency Analysis

Competency Matrix (Framework by role)

Step 1: label the Roles

Step 2: using the model, put an X in the intersecting cells where that role performs that task

Step 3: change each X to a number 2, 3, or 4, representing the proficiency that role must have for this task

Category	Task	Critical To Success	Task Example Link	Role 1	Role 2	Role 3	Role 4

Sales Example
Task = Develop winning proposals with sound financial justification

- Account Executive = level 3
- Pre-Sales = level 2
- Sales Manager = level 4.
- Sales VP = level 5.

Summary



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



Summary

In just 3 weeks, we know:

- ⚙ What someone in a particular role should be able to do
- ⚙ What each task looks like at various levels of proficiency → to GREAT
- ⚙ What tasks are really critical to success
- ⚙ The minimum levels of proficiency for people in this role or similar roles
- ⚙ What learning opportunities helped high performers learn and continue to execute these tasks

Competency Assessment Tool

For competency models to be valuable:

- ⚙️ They should be easily accessible for reference
- ⚙️ They should be easy to measure yourself against them, to guide professional, competency-based development
- ⚙️ Like ATD Career Navigator

Assessment Results: Personalized Learning Plan

Here you can see the automatically generated recommendations that can close your skill gaps. Exporting the list will display additional information. Place a check in the On Development Plan column to add items to your short term development plan. If you make any changes, click the Submit button.

Report Criteria
Employee Assessment Date: 5/6/2015
Manager Assessment Date: 5/6/2015

Submit Cancel Evaluation Details

Priority calculated by: Skill gap size

Priority	Task/Skill	Activity Description	On Development Plan?	Target Completion Date	Completed?	Activity Type	Activity Link	Status
1	Develop winning proposals	Building A Business Case	<input checked="" type="checkbox"/>	08/31/2015	<input type="checkbox"/>	Activity	view	Active
1	Develop winning proposals	Expert on writing winning proposals: email to arrange meeting	<input type="checkbox"/>		<input type="checkbox"/>	Expert	view	Active
2	Qualify opportunities	Opportunity Sales Planning (eLearning): Opportunity Analysis	<input type="checkbox"/>		<input type="checkbox"/>	eLearning	view	Active

Category	Task/Skill	Task Example	Min Value For Role	Employee Rating	Manager Rating	Blended Rating	Gap Btw Min & Blended Rating
Creating And Closing Opportunities	Build business justification cases	view	3	2	1	1.4	-1.6
Creating And Closing Opportunities	Qualify opportunities	view	3	2	2	2	-1
Creating And Closing Opportunities	Develop winning proposals	view	3	1	3	2.2	-0.8

Contact Information



Cheryl Lasse, Managing Partner
407.876.9850
classe@skilldirector.com



Link to download notes & templates: <http://ow.ly/TyIFJ>