

Learn To Build A Competency Model in Weeks!

Presented by SkillDirector

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Other Webcasts you may want to watch based on questions

- ⚙ How to Accelerate Learning Transfer Through Competency-Based Learning
<http://webcasts.td.org/webinar/2643>
- ⚙ Create Informal, Competency-Based Learning In Only 1 Day
<http://webcasts.td.org/webinar/2642>
- ⚙ How to Use Standard Competency Models to Accelerate Learning Transfer
<http://webcasts.td.org/webinar/1809>

Objectives

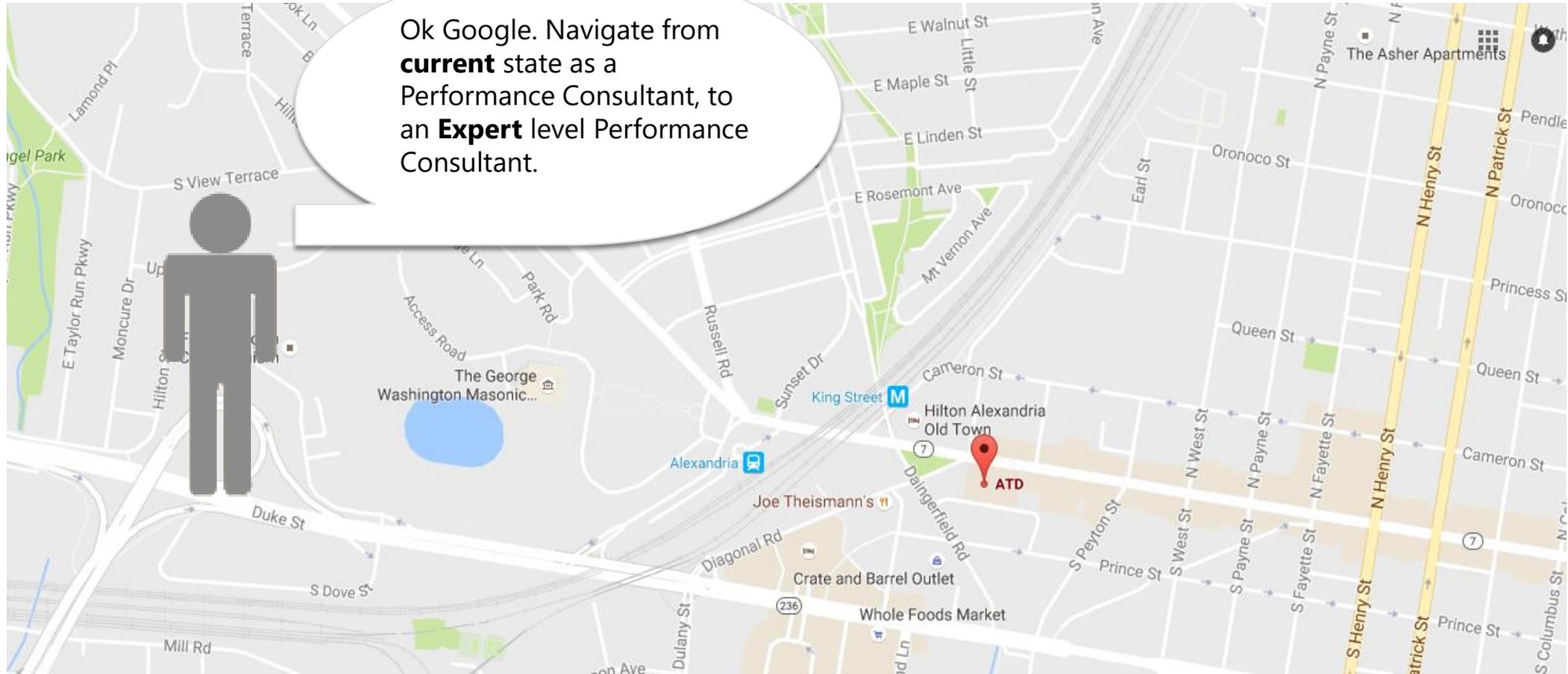
- ✦ Create a competency model quickly
- ✦ Make your competency model actionable throughout the employee lifecycle, including career planning
- ✦ Leverage this method to create a culture of learning



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

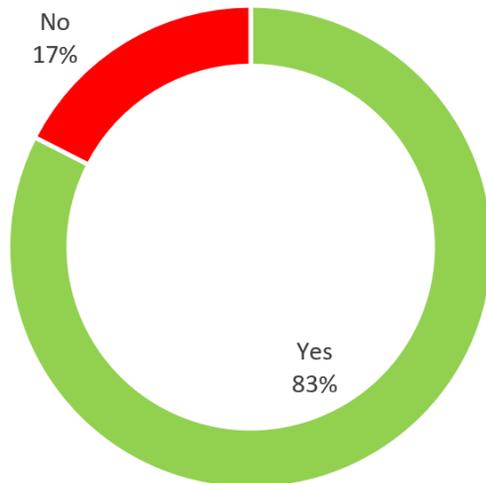


Competency Models

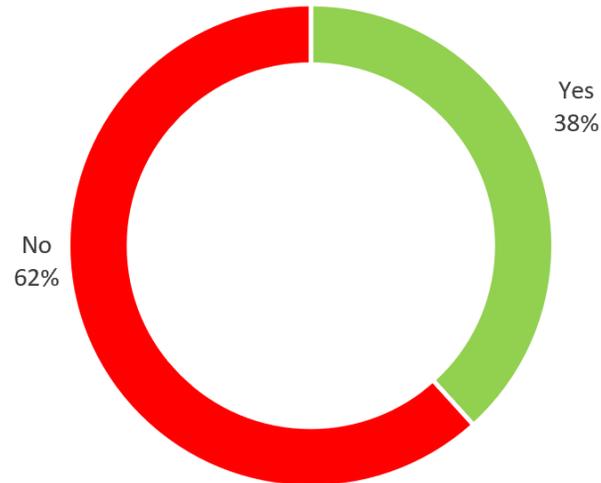


Webcast Participant Input

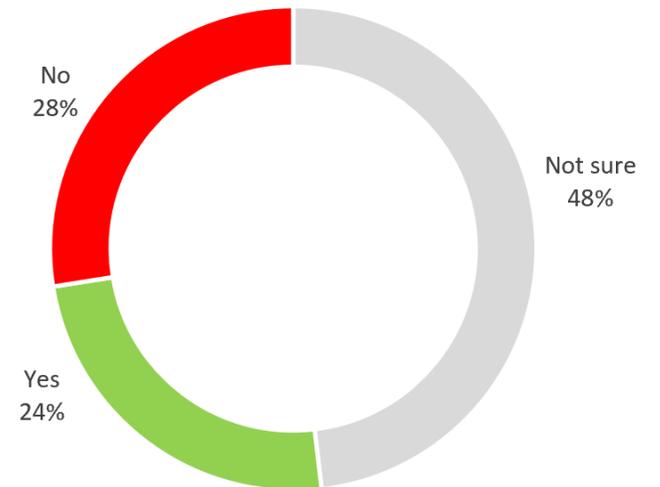
Does your organization expect employees to own their development and career planning?



Do you use competency models to drive professional development?



Are you confident that your Learning Department is creating the content and types of learning that your target audience needs to do their jobs? (i.e., competency-based learning)



Competency Model Development

1

Conduct a Rapid Job Analysis Workshop

2

Identify Task Examples

3

Perform a Task Proficiency Analysis

Conduct a Rapid Job Analysis Workshop

One day



Facilitator & Recorder



ONLY 4-6 High Performers & 1 Manager

“If you had a new person in this role, who would you want them to shadow to learn the best behaviors? Who would you want to clone if you could?”



Rapid JA Workshop
Preparation For
Customer.docx

**Invite participants &
set ONLY time expectations... no pre-work!**

Rapid Job Analysis Workshop Execution



**Nominal Group
Technique**

**Brainstorm Categories
then Tasks**

Rapid Job Analysis Workshop Execution

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

Brainstorm the categories (100,000 foot level)

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	Participate in new product rollouts
Collaborating	Resource planning/scheduling/ Resource utilization	Product support strategies and implementation
Customer visits	Defining operational strategy	
	Development activities	

Rapid JA Workshop Agenda.docx

Rapid JA Workshop Agenda and Instructions.docx

Rapid JA Workshop Category Brainstorm Template.docx

Rapid Job Analysis Workshop Execution

Job to be Analyzed	
Date	
Location	

Participants

Role	Name	Title	Location
Participant			
Observer			
Observer			
Observer			

List of Categories

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

Rapid JA Workshop
Task List
Template.docx

Rapid Job Analysis Workshop Execution

Category 1: Management			
Task #	Task Statement	Behavioral Example Notes	CTS
1	Complete performance reviews	<ul style="list-style-type: none"> • Conduct informal and formal reviews of employees throughout the year • (L4) Save detailed examples as they happen 	
2	Have regular conversations with team members	<ul style="list-style-type: none"> • Talk to people about their next job role • (L4) Use blended assessment results to add structure to conversations • (L5) Make personal development a part of every conversation 	

Rapid JA Workshop
Task List
Template.docx

TASK: 10,000 foot level
What they do

EXAMPLE: 1,000 foot level
How they do it – what it looks like

Rapid Job Analysis Workshop Execution

Learning Opportunities & Assets Available

How did you learn to do these tasks (formal and informal)?

What tools or templates or checklists have you created? Would you share them?

Formal

- Classes
- E-Learning
- Webinars
- Lunch & learns

Informal

- Job aids/checklists
- Templates
- Skill practices
- Special projects
- Defined experiences
- Working with a mentor
- Leading a project
- Supporting a project

Learning Opportunity Gaps

If they mention things they know they need, but don't have, list them here

Rapid JA Workshop
Task List
Template.docx

Rapid Job Analysis Workshop Execution

Category 1: Property Management		
Task Number	Task Statement	Behavioral Example Notes
1	Develop an annual budget	<ul style="list-style-type: none"> Attend training on the budget process Follow the budget workflow and project plan Assign the budget task and required data gathering to
Category 2: People Management		
Task Number	Task Statement	Behavioral Example Notes
1	Recruit Community Managers or Assistants	<ul style="list-style-type: none"> Read the position in JD <ul style="list-style-type: none"> Identify applicants to consider Review resumes with the professional (e.g. target roles and whether training is needed) Review resumes, assign interview questions, and set up and conduct phone screens Set up and conduct face-to-face interviews with select candidates Interview using decision matrix (R) to compare and select applicants (e.g. Associate Manager) Present position and candidate information to HR for selection and management needs Review the offer letter to confirm and send to selected candidate Once accepted, review HR contract and selected candidate Share work of the hiring decision Send welcome letter to new hire
2	Onboard and train new Community Managers	<ul style="list-style-type: none"> Meet with HR & Development personnel to identify the work activities and tasks a candidate must do <ul style="list-style-type: none"> Working time with HR Who they will shadow Identify Day 1 Orientation activities <ul style="list-style-type: none"> All morning to the morning to make important office introductions Working in the afternoon to review the onboarding process Arrange for all day onboarding activities to guide new Community Manager through the activities they need to do in their role <ul style="list-style-type: none"> Participate in some of the steps with them Assign completion of the supervisor checklist Assign their familiarity with the Property Workflow Take walk tour to identify who is available to be a shadow and assign them <ul style="list-style-type: none"> Assign they work with the shadow Use the supervisor checklist to evaluate new hire



Rapid Job Analysis Workshop Follow Up Activities

Original Tasks	Polished Task	Task Examples
<p>Complete performance reviews</p> <p>Have regular conversations with team members</p> <p>Set team goals and objectives that align with my organization strategies</p> <p>Identify team skill gaps</p>	<p>Drive the development of people on my team</p> <p>Rapid JA Workshop Task List Template.docx</p>	<ul style="list-style-type: none">• Identify team skill gaps• Have regular conversations with team members• Conduct informal and formal reviews of employees throughout the year• Talk to people about their next job role• Set team goals and objectives that align with my organization strategies• (L4) Use blended assessment results to add structure to conversations• (L5) Make personal development a part of every conversation

Rapid Job Analysis Workshop: Keys To Success

- ⚙ If you can't come up with any examples of what a task looks like at various proficiency levels, then it's an example of something else
- ⚙ Knowledge: Don't focus on knowledge alone – focus on what they need to be able to **DO** with that knowledge
- ⚙ There is no magic number of tasks, though 15-25 is typical (consider the role)
- ⚙ **A competency model doesn't define everything you do in a role, but rather what's important to execute corporate strategy**
- ⚙ Big models should be broken into something more digestible and actionable

Rapid Job Analysis 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:

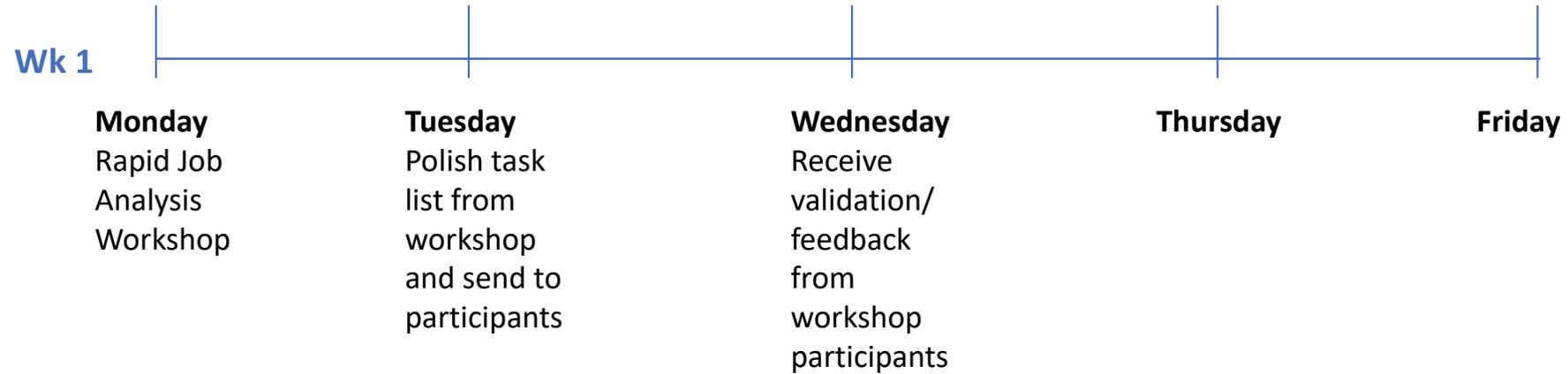
- Review the tasks and task examples and make sure they well represent what we came up with in the session. Track changes is on, so make whatever adjustments you feel are required. We'll be using this document as the input for our next step.
- Either send back this document with your edits, or if you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

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

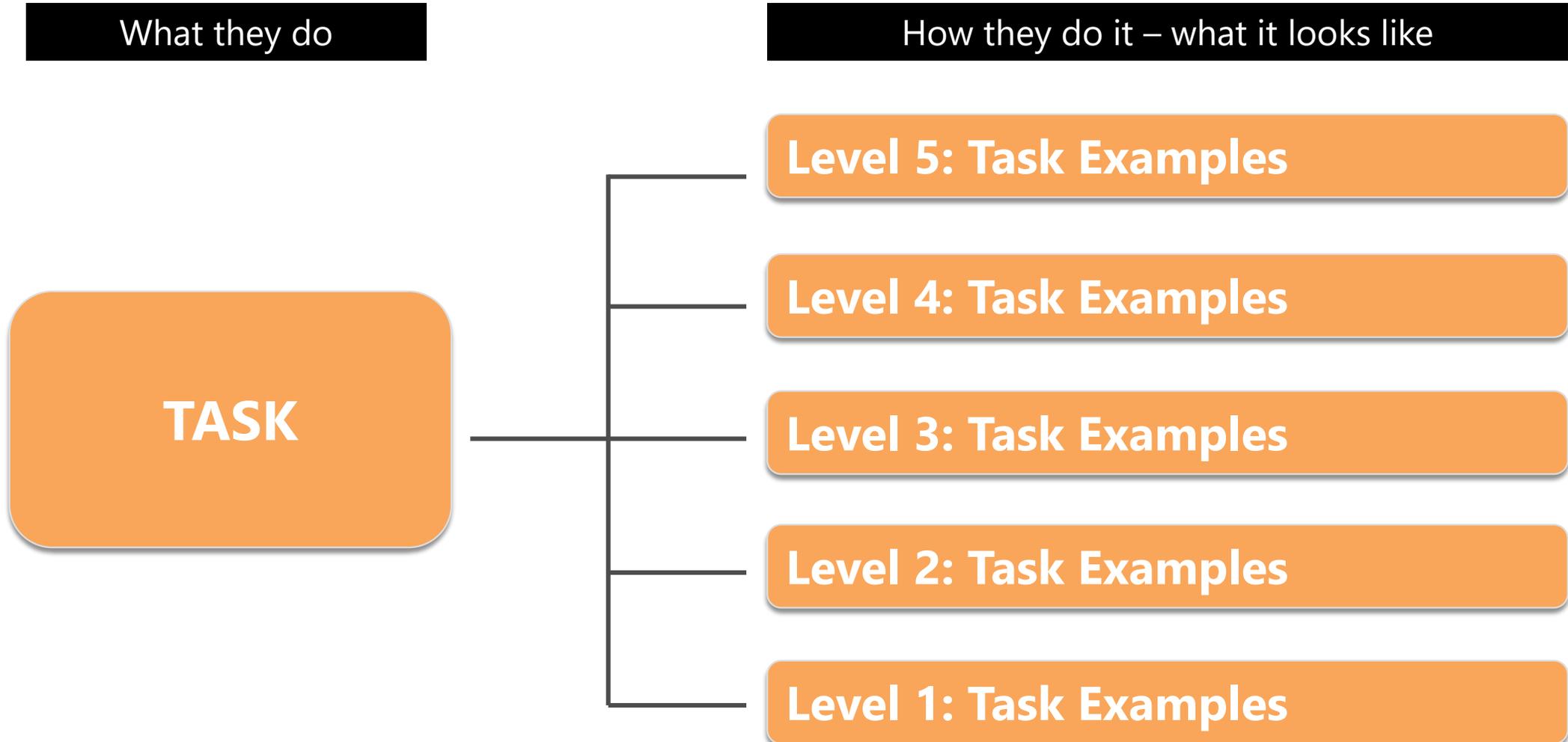
Best regards,
Cheryl

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

Rapid Job Analysis Workshop Timeframe



Identify Task Examples



Scale Descriptors

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	Skilled	Demonstrate advanced task/skill/knowledge. Apply structure. Demonstrate insight. Coach others.
3	Applied	Perform task/skill consistently, accurately and independently.
2	General	Understand basics of task/skill/knowledge. May perform task/skill at a basic level, or perform with coaching and supervision.
1	Learning	Have limited awareness of task/skill/knowledge. Require development/coaching.

Task Example

Coach and mentor my team

Instructions

Use this list to identify which level of proficiency best describes your behavior relative to this task/skill.
If sub-bullets are present, they represent potential specific examples of this behavior.

Level	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• Demonstrate 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 my team• Demonstrate Applied behaviors
3 - Applied	<ul style="list-style-type: none">• Find what people can do well and maximize their talent• Utilize high performers to be task-based mentors for others<ul style="list-style-type: none">○ Understand that others will elevate their skills by being task-based mentors for those tasks/skills where they are high performers• Look for trends in performance, internal relationships, and customer interactions, and provide coaching as necessary to improve skill sets• Schedule noncritical experiences that allow for possible failure without jeopardizing significant effectiveness• Document observations and conclusions
2 - General	<ul style="list-style-type: none">• Coach my team, focusing on underperformers or those who appear to be struggling at a particular task• Coach and mentor upon request
1 - Limited	<ul style="list-style-type: none">• Coach and mentor others through specific situations/activities• Coach those who ask for help

Task Example
Instructions and
Ideas.docx

Task Example
Template.docx

Task Example Bonuses

- ⚙️ **Need to drive specific actions?** Use frequency and consistency behaviors.
 - ⚙️ always, quarterly, monthly, weekly
- ⚙️ **Want to drive innovation?** Make those your level 5 behaviors.
- ⚙️ **Want a learning culture?** Make learning behaviors increasingly prevalent as you move up the scale.
- ⚙️ **Inspire people to level 5!** When used during onboarding, you can quickly communicate what's important.



Pre-work must be required

Each participant will have to read through the examples and make additions, changes, and deletions, which typically takes them 1-2 hours.

Set expectations early by asking them to block the time on their calendar.



Task Example Timeframe

Wk 1

Monday
Rapid Job
Analysis
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

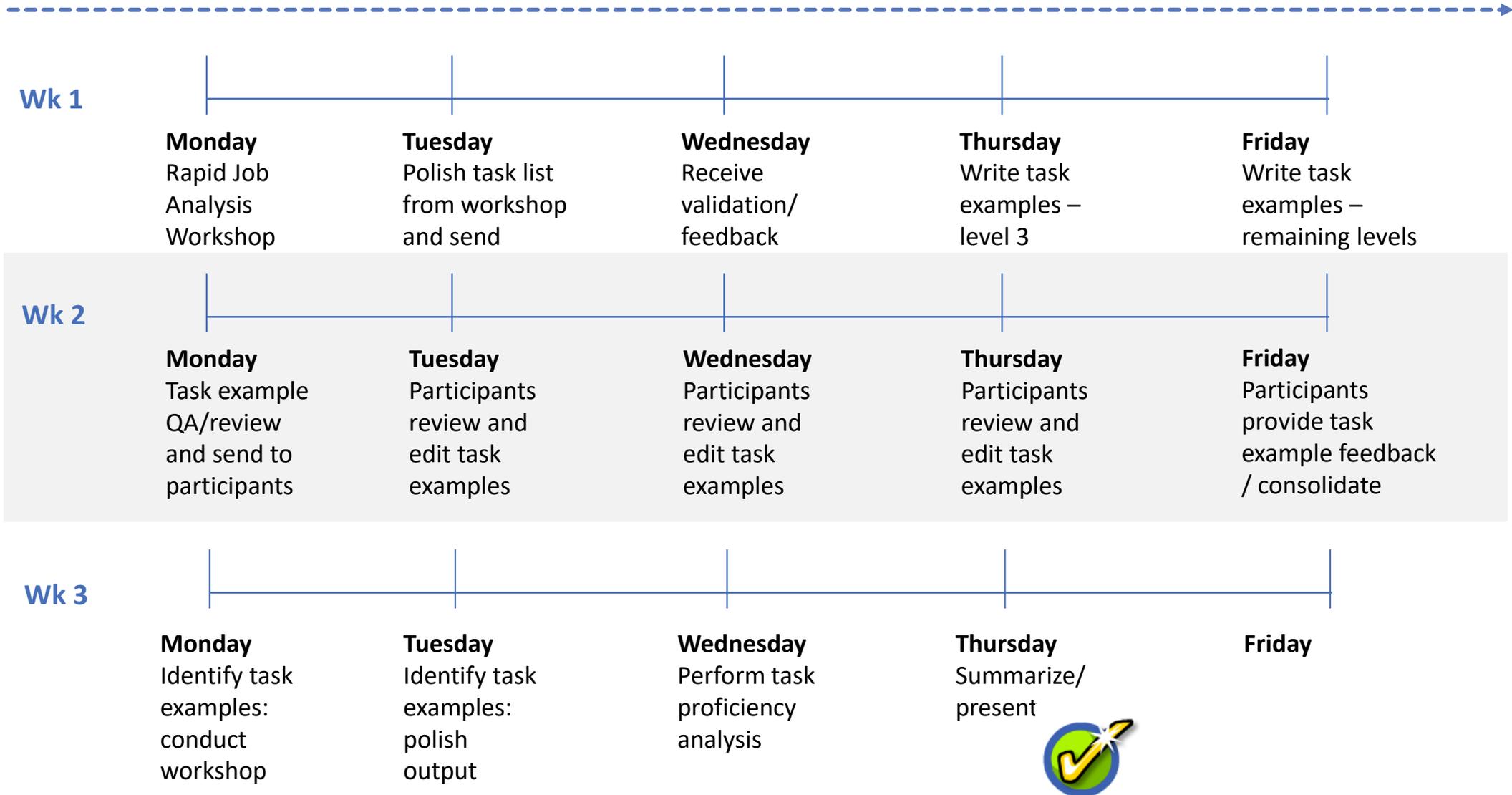
Coach and mentor my team

Level	Examples
5 – Expert	Seek opportunities to coach and mentor <u>weekly</u> outside of regularly scheduled sessions
4 – Skilled	Spend at least some time out of every day week coaching my team
3 – Applied	Schedule noncritical experiences that allow for possible failure without jeopardizing significant sales effectiveness
2 – General	Coach my team, focusing on underperformers or those who appear to be struggling at a particular task
1 - Learning	Coach and mentor others through specific situations/activities

Task Example
Instructions and
Ideas.docx

Task Example
Review Workshop
Agenda.docx

Summary



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 (from Learning to Good **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

Make your competency model actionable (td.org/skilltracker)

atd SKILL TRACKER Skill Tracker

Hi, Cheryl Logout

Self-Assessment Career Planning ATD Practice Tests Skill Tracker Resources

Perform Self-Assessment

Use this function to assess yourself in your current role, shown in the header below. [Click here](#) to change your role.

For each task/skill, [click on the \[i\]](#) to review behavioral examples and then rate your proficiency. Click Submit.

Assessment Details
 Assessment Date: 5/11/2017
 Role/Track: HR/OD Professional Track

Submit Save Cancel

Competency	Task/Skill	No to Little Proficiency	Limited Proficiency	Consistent Proficiency	Advanced Proficiency	Exceptional Proficiency
Instructional Design	Conduct a targeted needs assessment	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Instructional Design	Identify learning approach that best addresses learner/organization needs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Instructional Design	Apply adult learning theory to instructional design	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

Competency Assessment Tool

For competency models to be valuable:

- ⚙️ Easily accessible
- ⚙️ Easy to measure yourself against them, to guide professional, competency-based development
- ⚙️ Like ATD Skill Tracker

Personalized Learning Plan




Here you can see the automatically generated recommendations that can close your skill gaps. Printing or 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.

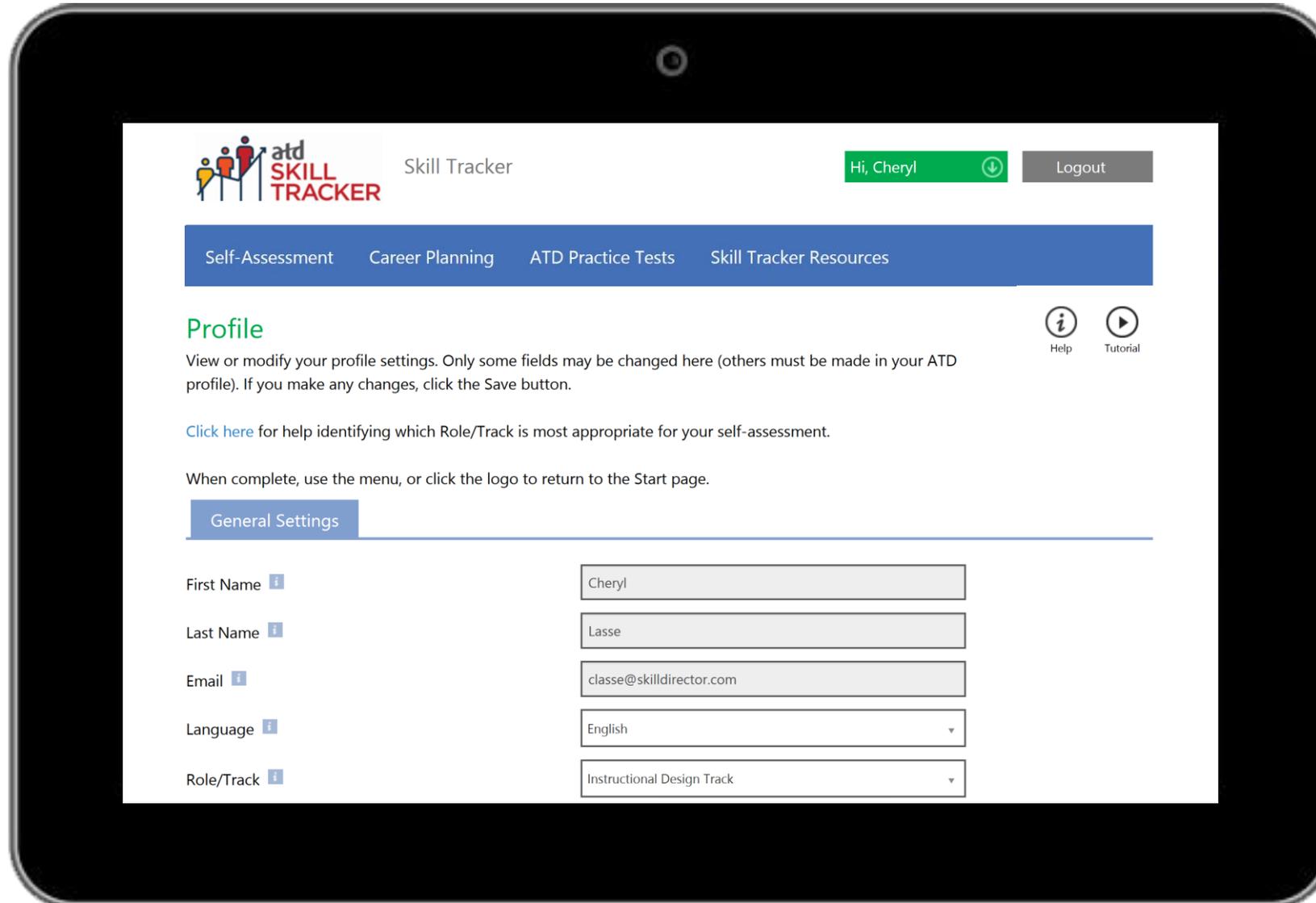
Submit
Cancel
Evaluation Detail
Refresh Activities





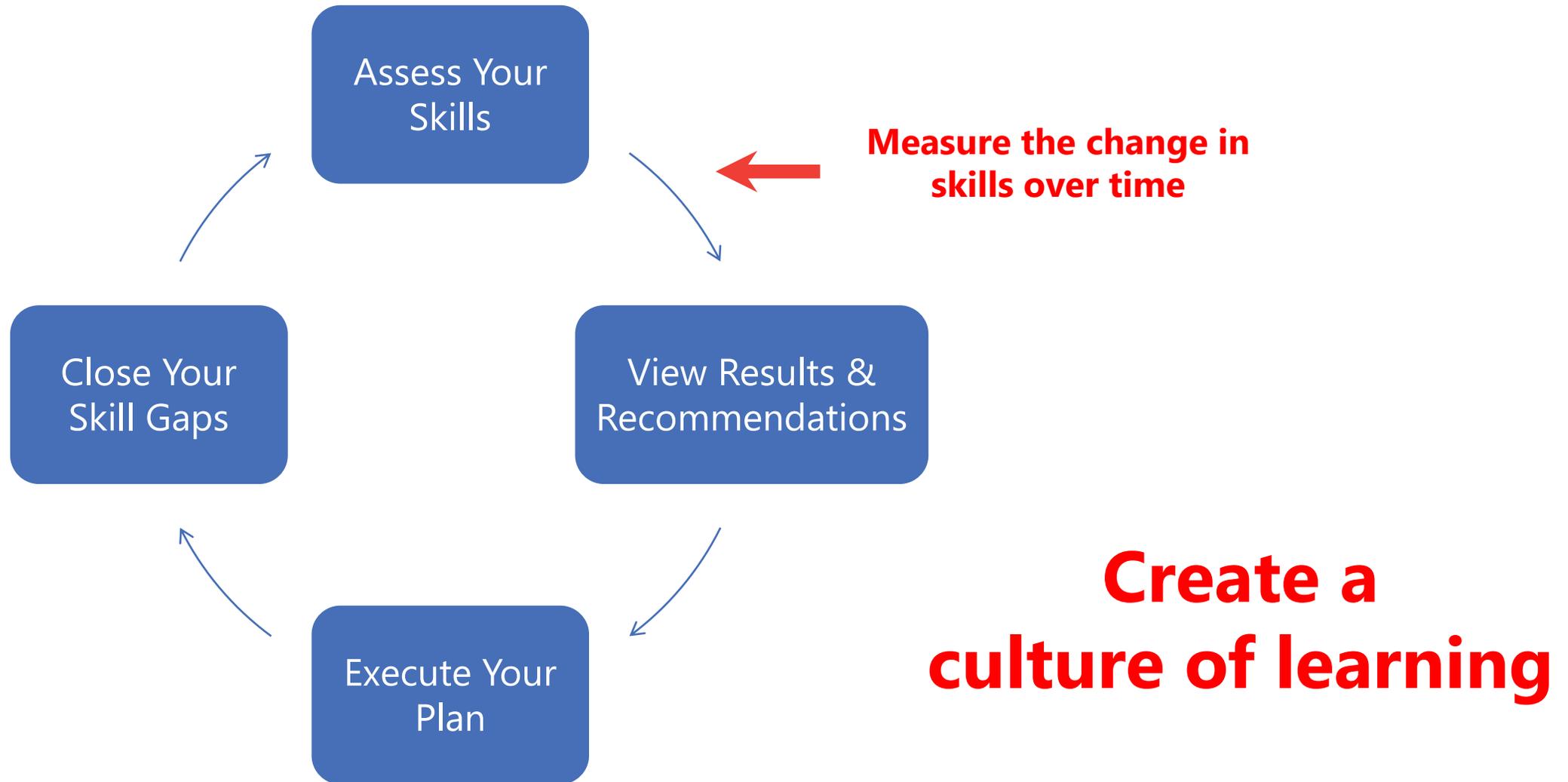

Priority	Task/Skill	Activity Description	Activity Type	On Development Plan?	Target Completion Date	Activity Link	Price	Completed?
1	Conduct a targeted needs assessment	Needs Assessment Basics	Book	<input checked="" type="checkbox"/>	06/12/17	view	Member: \$24.95 / List: \$29.95	<input type="checkbox"/>
1	Collaborate with learning design project members	ISD From the Ground Up (3rd Edition)	Book	<input type="checkbox"/>		view	Member: \$28.18 / List: \$35.65	<input type="checkbox"/>
1	Collaborate with learning design project members	Designer SME Collaboration	Book	<input type="checkbox"/>		view	Member: \$19.95 / List: \$24.95	<input type="checkbox"/>
1	Conduct a targeted needs assessment	Assessing Learning Needs	On Demand	<input type="checkbox"/>		view	Member: \$195 / List: \$245	<input type="checkbox"/>
1	Collaborate with learning design project members	Essentials of Working with SMEs to Develop Training	Workshop	<input type="checkbox"/>		view	Member: \$495 / List: \$850	<input type="checkbox"/>

Make your competency model actionable (td.org/skilltracker)



The screenshot displays the Skill Tracker web application interface. At the top left is the logo for 'atd SKILL TRACKER'. To the right of the logo is the text 'Skill Tracker'. Further right, there is a green button with the text 'Hi, Cheryl' and a dropdown arrow, and a grey button labeled 'Logout'. Below this is a blue navigation bar with four items: 'Self-Assessment', 'Career Planning', 'ATD Practice Tests', and 'Skill Tracker Resources'. The main content area is titled 'Profile' in green. Below the title is a paragraph: 'View or modify your profile settings. Only some fields may be changed here (others must be made in your ATD profile). If you make any changes, click the Save button.' To the right of this paragraph are two icons: an information icon labeled 'Help' and a play icon labeled 'Tutorial'. Below the paragraph is a link: 'Click here for help identifying which Role/Track is most appropriate for your self-assessment.' Underneath is another paragraph: 'When complete, use the menu, or click the logo to return to the Start page.' A blue button labeled 'General Settings' is positioned above a horizontal line. Below the line are five form fields, each with an information icon to its left: 'First Name' (Cheryl), 'Last Name' (Lasse), 'Email' (classe@skilldirector.com), 'Language' (English), and 'Role/Track' (Instructional Design Track).

How Competency Models Can Be Used



How Competency Models Can Be Used



Recruiting



Onboarding



Ongoing skill development



Career planning



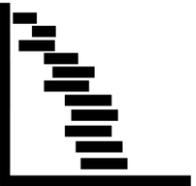
Coaching



Mentoring



Communicating culture



Developing L&D action plans

More Information Contact & Resources



Cheryl Lasse

Managing Partner

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Twitter: @SkillDirector



Resources

[Download notes & templates for how to do it](#)

[Assess yourself with the ATD Skill Tracker \(http://td.org/skilltracker\)](http://td.org/skilltracker)

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

[White paper on how to sell this to leadership](#)