

Create a competency model & perform a competency assessment to identify skill gaps

Presented by SkillDirector

Cheryl Lasse & Lesley Roddam



Other resources based on questions

Topic	Link
All the ways to use a competency model	https://bit.ly/skilldirector-use-a-model
How to drive buy-in infographic	https://bit.ly/skilldirector-up-re-skill
How to drive buy-in white paper	https://bit.ly/skilldirector-free-paper
Learn how to create competency-based learning in weeks	https://bit.ly/skilldirector-based-learning
Learn how to create informal learning in a day	https://bit.ly/skilldirector-informal-learning
How to convert existing content into competency-based experiential learning	https://webcasts.td.org/webinar/3578
Where to focus upskilling and reskilling efforts	https://webcasts.td.org/webinar/3577

Learn how to...

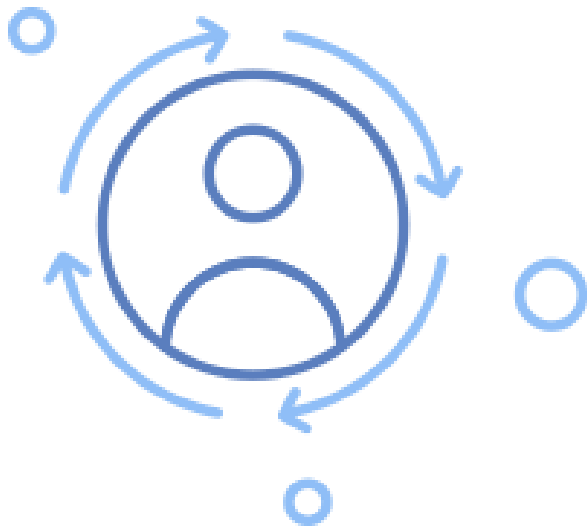
Rapidly create a competency model



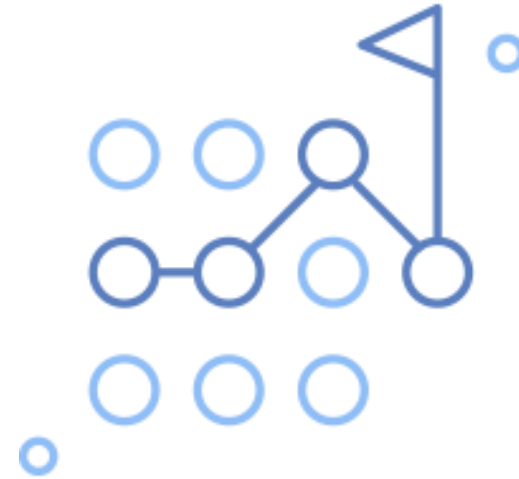
Perform a competency assessment



Upskilling: meeting **changing requirements for the **existing** role**



Reskilling: meeting requirements for a **new role**



Learn how to...

Rapidly create a competency model



Perform a competency assessment



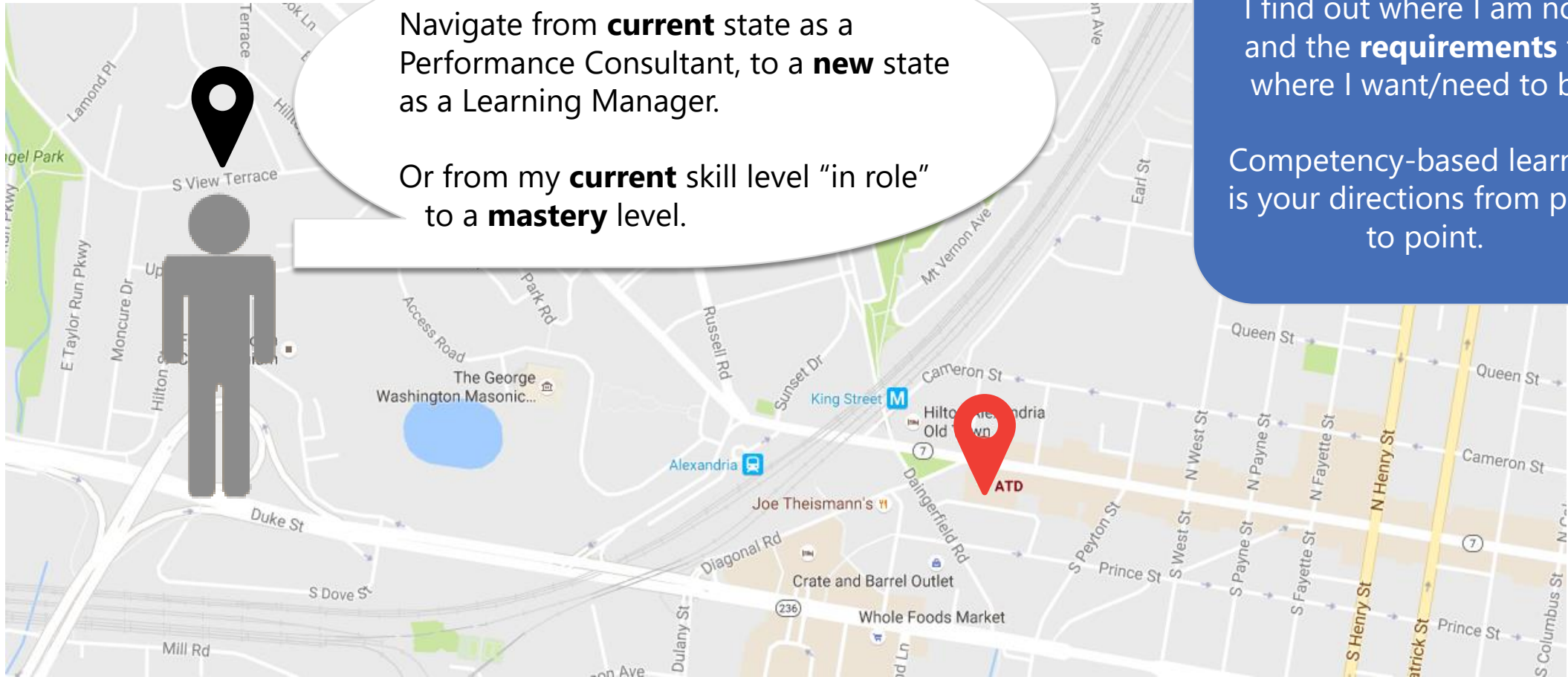
**A competency model
describes what it looks
like to be GOOD & GREAT
in your role**

**A competency
model drives
motivation to
mastery**



Learn more about Dan Pink:
<https://youtu.be/u6XAPnuFjJc>

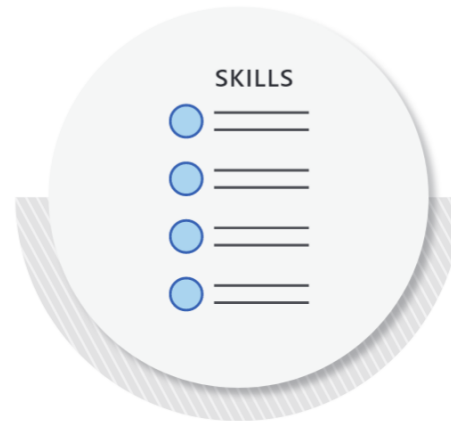
A competency assessment is like GPS



Start by rapidly creating a competency model

How do you define the requirements?

REQUIREMENTS = COMPETENCY MODEL



Provide **Awareness** of Expectations

Rapid competency model development

1

Conduct a Rapid Job Analysis Workshop

2

Identify Task Examples (behavioral 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?”



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



Rapid Job Analysis Workshop Execution

Use the nominal group technique

Rapid Job Analysis Workshop Execution

Category

Categories of things they do

100,000 ft/m

Task

Within a category, what they do

10,000 ft/m

Task Example

How they do it – what it looks like

1,000 ft/m

Rapid Job Analysis Workshop Execution



Rapid
JA Workshop
Agenda &
Instructions

Brainstorm the categories (100,000 ft/m level)

- Capture results without explanation

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	Execute projects
Issue resolution/case support	Resource planning/scheduling	Participate in new product rollouts
Collaborating	Defining operational strategy	Product support strategies and implementation
Customer visits	Development activities	



Rapid
JA Workshop
Category
Brainstorm
Template

Rapid Job Analysis Workshop Execution

- Project Execution
- Continuous improvement
- Sales Support
- Management

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	Execute projects
Issue resolution/case support	Resource planning/scheduling	Participate in new product rollouts
Collaborating	Defining operational strategy	Product support strategies and implementation
Customer visits	Development activities	

1. Create higher level categories
2. Color code original list into new categories

Rapid Job Analysis Workshop Execution

List of Categories

Project Execution
Continuous improvement
Sales Support
Management

Most time



Least time



Rapid Job Analysis Workshop Execution

Brainstorm the tasks (10,000 ft/m level)

- Start with an action verb
- Think linearly
- Capture results without explanation

Category: Management		
Task #	Task Statement	Behavioral Example Notes
	Complete performance reviews	•
	Have regular conversations with team members	•
	Set team goals and objectives that align with organizational strategies	•
	Identify team skill gaps	•



Rapid Job Analysis Workshop Execution

Before the break

Category: Management		
Task #	Task Statement	Behavioral Example Notes
	Complete performance reviews	•
	Have regular conversations with team members	•
	Set team goals and objectives that align with organizational strategies	•
	Identify team skill gaps	•



After the break

Category: Management		
Task #	Task Statement	Behavioral Example Notes
	Drive team development	<ul style="list-style-type: none"> • Have regular conversations with team members • Set team goals and objectives that align with organizational strategies • Identify team skill gaps • Complete performance reviews

TASK: What they do

EXAMPLES: How they do it / what it looks like

Rapid Job Analysis Workshop Execution

Polished Task	Task Examples
Drive team development	<ul style="list-style-type: none">• Identify team skill gaps• Have regular conversations with team members<ul style="list-style-type: none">○ Use the 1:1 Discussion Checklist to improve coaching effectiveness○ Review development activity progress• Advocate for the use of informal activities and experiences for learning• Drive completion of development activities, helping team members be accountable (each month: complete one, add one)<ul style="list-style-type: none">○ Prioritize and make time for people to pursue development activities• Adapt coaching to individual needs<ul style="list-style-type: none">○ Leverage competency assessments to identify strengths and areas of opportunity• Encourage autonomy in problem solving• Facilitate a discussion about career goals<ul style="list-style-type: none">○ Identify other opportunities for growth including lateral moves and lead roles• Conduct informal and formal reviews of employees throughout the year• Set team goals and objectives that align with my organization strategies

How do you do that?
What materials do you use?
How often?

Rapid Job Analysis Workshop Execution

Only the designated person speaks



Rapid Job Analysis Workshop Execution

Polished Task	Task Examples
Drive team development	<ul style="list-style-type: none">• Identify team skill gaps• Have regular conversations with team members<ul style="list-style-type: none">○ Use the 1:1 Discussion Checklist to improve coaching effectiveness○ Review development activity progress• Advocate for the use of informal activities and experiences for learning• Drive completion of development activities, helping team members be accountable (each month: complete one, add one)<ul style="list-style-type: none">○ Prioritize and make time for people to pursue development activities
What separates good from great?	<ul style="list-style-type: none">• (L4) Promote the importance of development to the team by recognizing it in meetings and talking about it often• (L4) Provide opportunities for team members to mentor each other• (L5) Create special projects and assignments tailored to people's skill gaps or career goals• (L5) Lead by example – develop self and share learning

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 Job Analysis Workshop Execution

Repeat for each category




Rapid Job Analysis Workshop: Keys To Success

After the workshop:

- ⚙ Edit tasks into a tight description similar to a learning objective
- ⚙ 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**

Rapid Job Analysis Workshop Follow Up

 Send

From ▾ classe@skilldirector.com

To,.. jsmith@skilldirector.com

Cc...

Bcc...

Subject IMPORTANT: Feedback requested by November 18

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 >

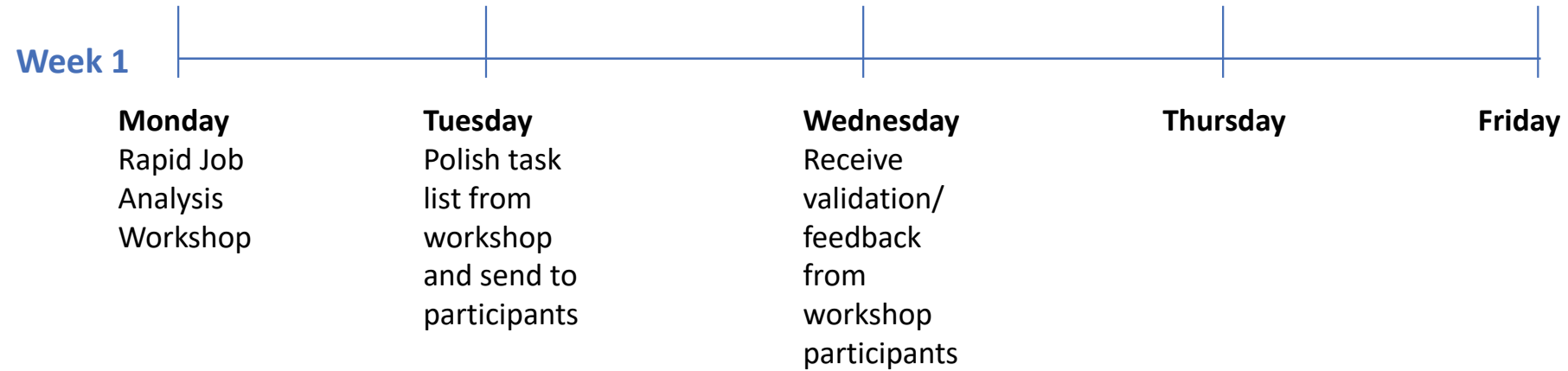
Our request, by 5pm Eastern on November 18:

- 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

Rapid Job Analysis Workshop Timeline



Identify Task Examples

What they do

How they do it – what it looks like

Task
Example
Instructions
and Ideas

TASK

Level 5: Task Examples

Level 4: Task Examples

Level 3: Task Examples

Level 2: Task Examples

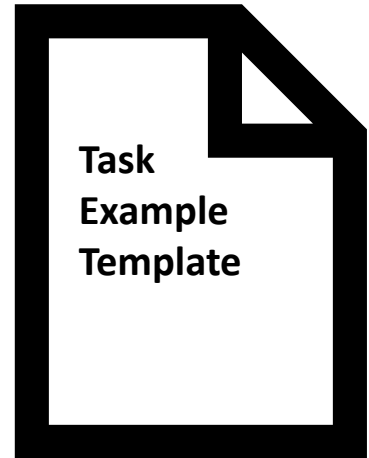
Level 1: Task Examples

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	Advanced	Demonstrate advanced task/skill/knowledge. Apply structure. Demonstrate insight. Coach others.
3	Skilled	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.

Identify Task Examples

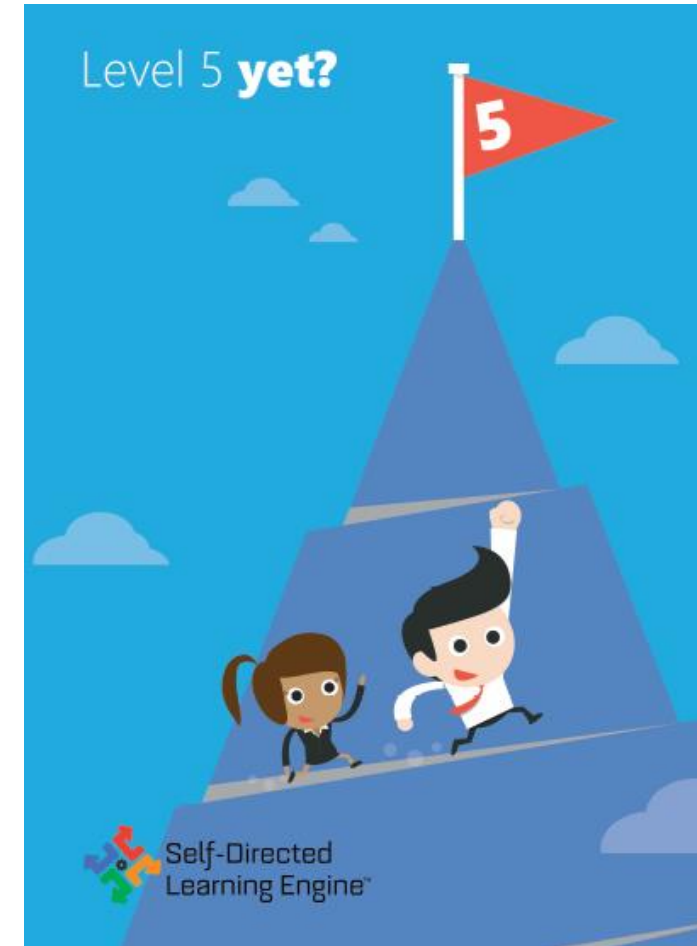
Example: Influence and persuade others to drive action



5	<ul style="list-style-type: none">• Successfully influence leaders to change their opinion/decision on critical items• Perceived internally as an authority on how to customize messaging to various levels of an organization (conversationally savvy)• Overcome strong position-based disagreement with agreement based on mutual interests
4	<ul style="list-style-type: none">• Spend time researching the motivations and requirements of others• Use relevant stories to persuade (beyond data)• When others disagree, support my view by connecting it to organizational goals• Create a sense of urgency
3	<ul style="list-style-type: none">• Often able to influence others, even when authority doesn't exist• Use a structured technique for preparing to talk with others<ul style="list-style-type: none">○ Consistently use pre-call/meeting planning○ Anticipate objections, and uncover non-obvious agendas/perspectives○ Plan for contingency• Research points of conflict and prepare data-driven support for my approach• Use active listening and probing techniques to understand differing points of view• Present support for my point of view in a persuasive, clear and easily understandable way that acknowledges the opinions of others
2	<ul style="list-style-type: none">• Build a case for my opinion• Use data to overcome differing opinions• Focus on objections rather than points of agreement• Recognize that the opinions of others may be based on more than what is said, but don't necessarily know what that is
1	<ul style="list-style-type: none">• Respond to the opinions of others as they are presented• Alter my messaging on demand based on what is said

Task Example Bonuses

- ⚙️ **Need to drive specific actions?**
Use frequency and consistency behaviors.
 - ⚙️ always, quarterly, monthly, weekly
- ⚙️ **Want to drive innovation and risk taking?**
Make them part of good to great 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.



QA the examples

Review your own work.

Then switch so it is reviewed by someone else.

- If facilitator writes it, recorder reviews it
- If recorder writes it, facilitator reviews it
- If both write half – each reviews the other's work



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 during the first workshop.



Task Example Timeline

Week 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

Week 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 Example Consolidation

- Use Microsoft Word's "Merge" feature to consolidate all feedback in one document
- Use your expertise to determine what to keep and what to eliminate

Level	Examples
5 - Expert	Seek opportunities to coach and mentor <u>weekly</u> outside of regularly scheduled sessions
4 - Advanced	Spend at least some time out of every day week coaching my team
3 - Skilled	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

Conduct Task Example Workshop



- Always virtual
- Allocate 3 hours
 - (usually takes less)
- Refresh everyone on the levels
- Task by task, discuss ONLY the changes/edits
- Ask, "Does anyone disagree with this change?"
- Don't accept changes during the event

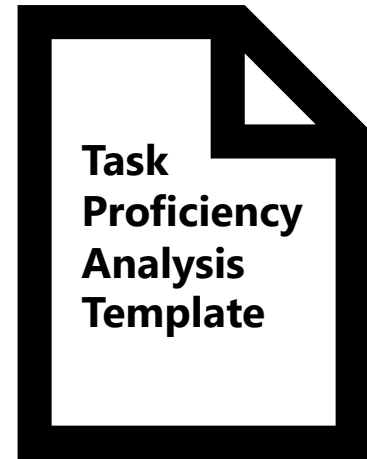
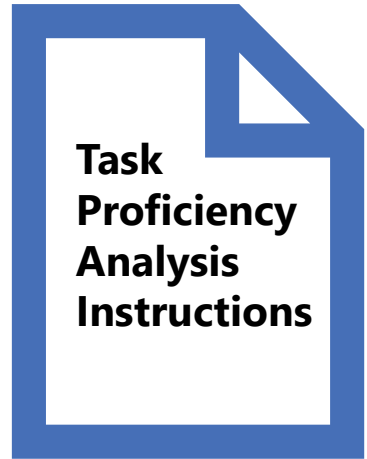
**Task
Example
Review
Workshop
Agenda**

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

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



Modeling Process Summary

Week 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

Week 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
/ consolidate

Week 3

Monday
Identify task
examples: conduct
workshop

Tuesday
Identify task
examples: polish
output

Wednesday
Perform task
proficiency
analysis

Thursday
Summarize/
present

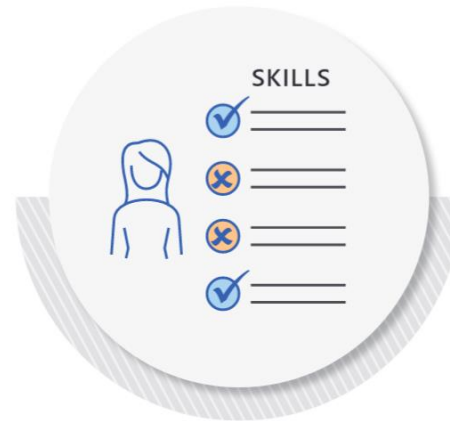


Friday

Perform a competency assessment

How do you know someone is able to meet the requirements?

COMPETENCY ASSESSMENT

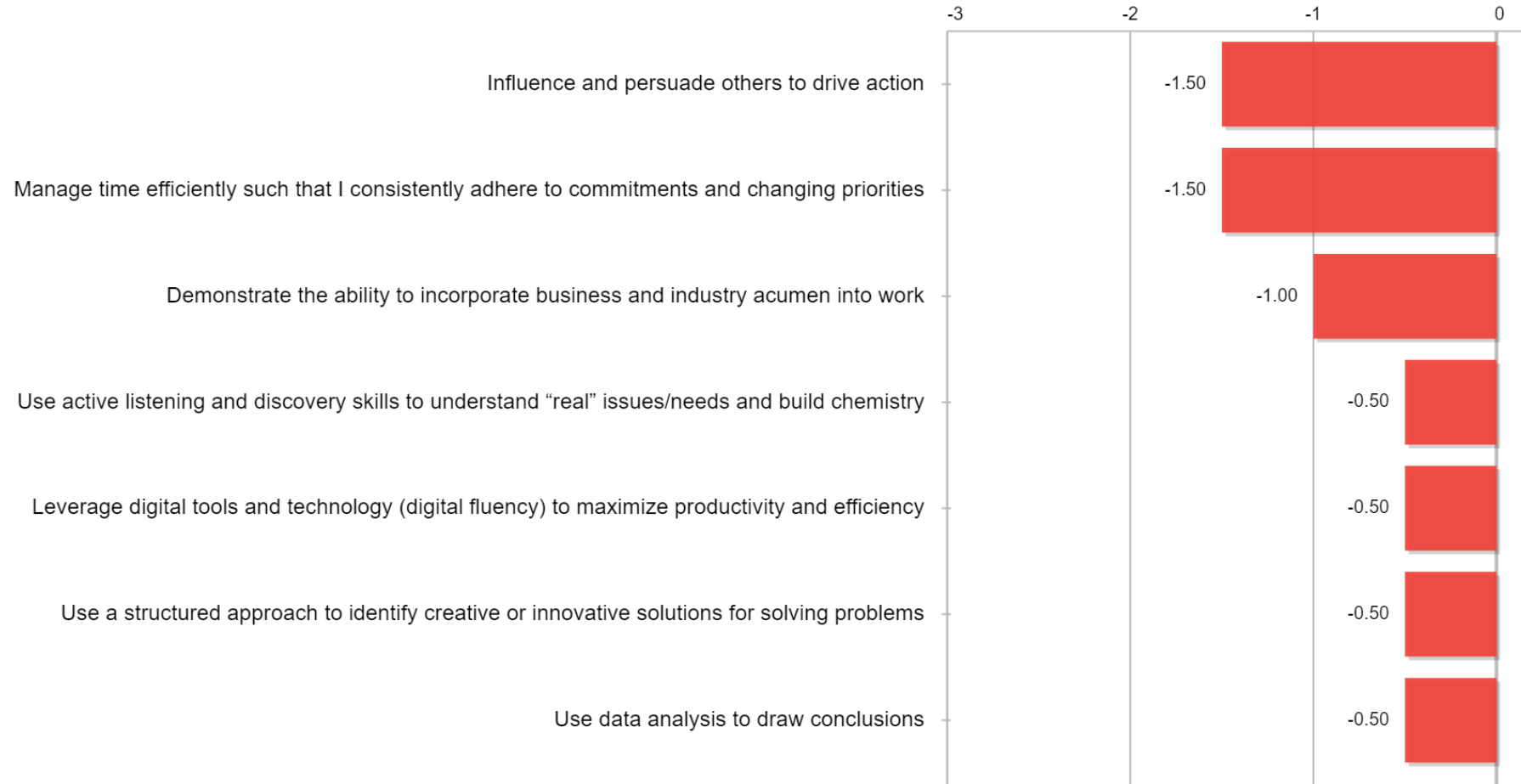


Acknowledge Capabilities and Skill Gaps

Competency assessments quantify skill gap size

Without competency assessment data/skill gap analysis, senior leaders are making decisions based on inadequate data.

If you don't know what you **can** and **can't** do, how can you decide what opportunities to pursue or what action to take?



How to get started assessing

You need at least 2 but preferably 3 elements for a competency assessment



A role-based competency model for people to assess against



A competency assessment system to facilitate scale, privacy, and capability analytics



Personalized learning to create individual reskill and upskill action plans

How to get started assessing

Perform Self-Assessment



SELF-ASSESSMENT

RESULTS

LEARNING OPTIONS

DEVELOPMENT PLAN

1. Click on the beside each task to fully understand the behaviors and best practices associated with each level.
2. Rate your perception of your proficiency.
3. Click Submit.

Category	Task/Skill	1 - Learning	2 - Basic	3 - Skilled	4 - Advanced	5 - Expert
Communication						
Communication	Influence and persuade others to drive action	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Communication	Use active listening and discovery skills to understand "real" issues/needs and build chemistry	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Communication	Consistently deliver externally-focused presentations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Strategic Thinking & Execution						
Strategic Thinking & Execution	Use a structured approach to identify creative or innovation solutions for solving problems	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Strategic Thinking & Execution	Collaborate within and across functional teams	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Strategic Thinking & Execution	Apply systems thinking	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Task Example

Influence and persuade others to drive action

Instructions
Select the proficiency level that best describes your behavior relative to this task. Close tab/popup when finished. If sub-bullets are present, they represent potential specific examples of this behavior.

Level	Examples
5 - Expert	<ul style="list-style-type: none"> Successfully influence leaders to change their opinion/decision on critical items Perceived by others as an expert on how to customize messaging to various levels of an organization (conversationally savvy) Overcome strong position-based disagreement with agreement based on mutual interests Demonstrate Advanced behaviors
4 - Advanced	<ul style="list-style-type: none"> Spend time researching the motivations and requirements of others Use relevant stories to persuade (beyond data) When others disagree, support my view by connecting it to organizational goals Create a sense of urgency Demonstrate Skilled behaviors
3 - Skilled	<ul style="list-style-type: none"> Often able to influence others, even when authority doesn't exist Use a structured technique for preparing to talk with others <ul style="list-style-type: none"> Consistently use pre-call/meeting planning including research



Competency assessments tell you required action

Once you know who does and doesn't have the required skills:



Provide personalized learning to close skill gaps



Pair high performers in with task-based mentors



Have Talent Acquisition hire people with the skills the organization currently lacks

Drive a culture of learning that drives continuous upskilling and reskilling







Competency assessment is not “one and done”

“Change is happening so fast that by the time we upskill or reskill employees, some of those new skills are already obsolete. We are looking at a future where millions of people will constantly have to re-invent their skills.”

– Rob Lauber, CLO at McDonalds,



Competency assessment supports Career Planning

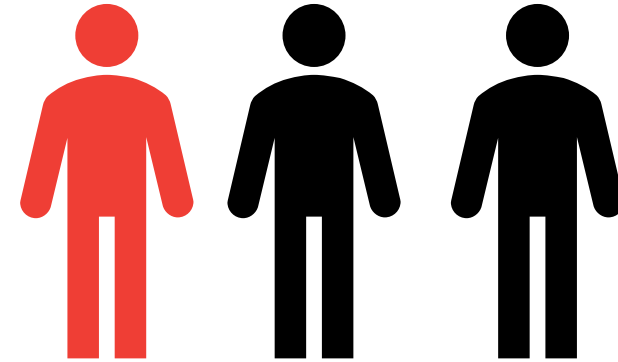
Account Executive	Channel Partner Manager	Sales Director/VP Sales
		
 Career Action Plan	 Career Action Plan	 Career Action Plan

Reskilling: meeting requirements for a **new** role

Don't just guess at the readiness for your next role...
really know and **prepare**

Competency assessment facilitates rapid and successful onboarding

- Tells the new hire what it looks like to be good and great in the job
- Eliminate fear, uncertainty, doubt
- Behaviors communicate culture

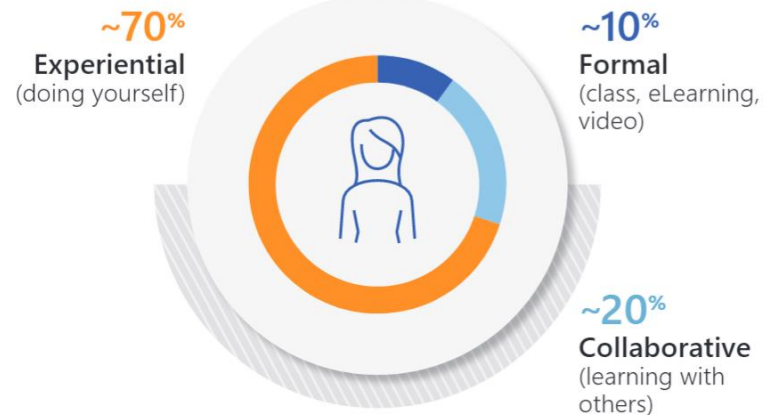


31% quit within 1st 6 months

Personalized Learning

How do you close the gaps?


PERSONALIZED COMPETENCY-BASED LEARNING



Take **Action**

Many skill gaps are in soft skills that are growing in importance. **They are the Skills of the Future.** Acquiring these skills requires experiential learning.

Personalized Learning

My Personalized Learning Options  SkillDirector™
PERSONALIZED LEARNING

SELF-ASSESSMENT → RESULTS → **LEARNING OPTIONS** → DEVELOPMENT PLAN

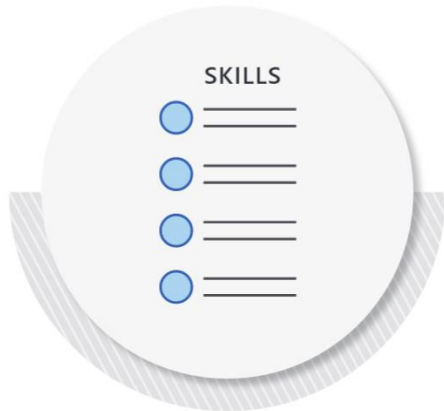
These are the learning options that can close your skill gaps. Printing or exporting the list will display additional information. Use the following workflow to help you create a manageable Development Plan and make learning a habit.

On Development Plan?	Priority	Task/Skill	Activity Description	Type	Link	Target Completion Date
<input type="checkbox"/>	2	Collaborate within and across functional teams	Build and Execute a Relationship Strategy: Use a Relationship Action Plan template to create structure and routine for developing and sustaining mutually beneficial relationships with the people who can help you the most	Skill Practice	view	
<input type="checkbox"/>	2	Collaborate within and across functional teams	Create an ideas list that will address how to overcome differences among team members that could impact successful collaboration. If possible, brainstorm with other team members. Determine fun techniques for implementing during a meeting. Be sure to start each meeting with a review of your techniques.	Activity		
<input type="checkbox"/>	2	Collaborate within and across functional teams	Earn Trust: Develop actionable steps that will help you build credibility with customers, partners, and internal colleagues	Skill Practice	view	
<input type="checkbox"/>	2	Collaborate within and across functional teams	Resources Action Plan: Build a project action plan that engages the required internal and external resources	Skill Practice	view	

Application of Competency Models

How do you define the requirements?

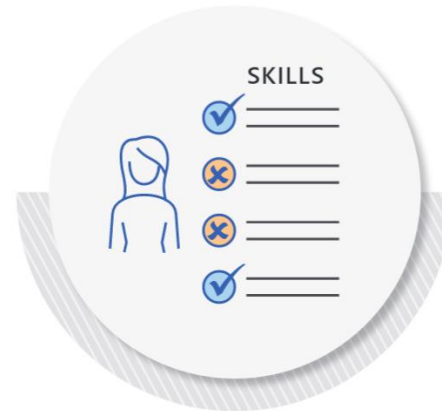
REQUIREMENTS = COMPETENCY MODEL



Provide **Awareness** of Expectations

How do you know someone is able to meet the requirements?

COMPETENCY ASSESSMENT

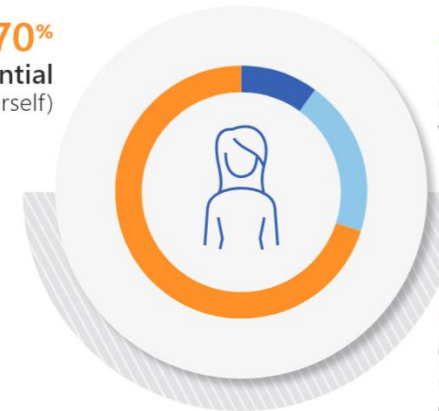


Acknowledge Capabilities and Skill Gaps

How do you close the gaps?

**PERSONALIZED
COMPETENCY-BASED LEARNING**

~70%
Experiential
(doing yourself)



~10%
Formal
(class, eLearning, video)

~20%
Collaborative
(learning with others)

Take **Action**

Many skill gaps are in soft skills that are growing in importance. **They are the Skills of the Future.** Acquiring these skills requires experiential learning.

Contact Information & Resources



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Download competency model materials	https://bit.ly/skilldirector-cm-materials-atd
Upskilling/reskilling infographic	https://bit.ly/skilldirector-up-re-skill
What is a competency assessment blog	https://bit.ly/skilldirector-assess
Get a competency assessment	https://bit.ly/skilldirector-assessment-atd
White paper on other ways to sell this to leadership	https://bit.ly/skilldirector-free-paper
Competency Models For Professional Development LinkedIn Group	https://www.linkedin.com/groups/8467576

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