

Taking It To The Next Level:

*Applying Competency Models in Your
Organization and Your Career*
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Agenda

- Learn about the major types of competency models (core, leadership, functional, and technical) and how they promote strategic alignment.
- Explore some key takeaways for the successful deployment of competency models.
- Benchmark your own training and development skills against the ASTD Competency Model, and obtain practical tools to continue your career growth.

About HUDSON Research & Consulting



- In business since 2001, focusing on organizational and market research, competency models and associated TM applications, learning and consulting.
- Conduct many competency model projects, collaborating with clients to create a concise, memorable models that build commitment for superior results.
- Clients include: Abbott, Bristol-Myers Squibb, Citibank, Chubb, Estée Lauder Companies, MetLife, Novartis, NRG Energy, Merck, PepsiCo, Pfizer, Sanofi-Aventis, Tiffany & Co., as well as other Fortune 1000 companies.

About ASTD



Established in 1943

ASTD is the world's largest association dedicated to training and development professionals.

ASTD provides content for learning and development professionals (e.g., research, analysis, benchmarking, online information, books, and other publications).

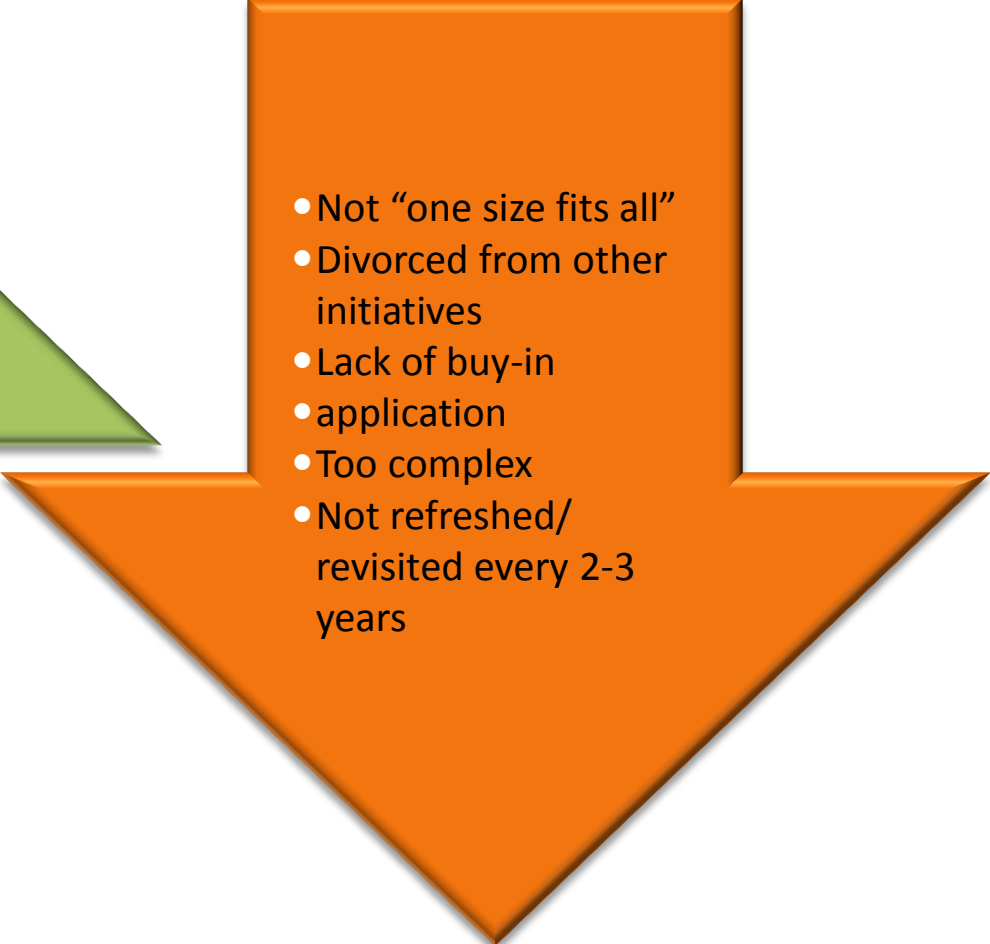
Our 70,000+ members and affiliates come from...

- Nine Communities of Practice
- More than 100 countries
- More than 125 U.S. chapters
- More than 15 International Partners
- Thousands of organizations of all sizes, government, independent consultants, and suppliers



Effective Competency Model Characteristics

- 
- Concise/Memorable
 - Reflect your culture/brand
 - Executive-level sponsorship
 - Built /vetted by stakeholders
 - Designed with a future focus
 - Launched with an APPLICATION

- 
- Not “one size fits all”
 - Divorced from other initiatives
 - Lack of buy-in application
 - Too complex
 - Not refreshed/ revisited every 2-3 years

Competency Model: Benefits



Quick Poll

- Do you use competency models:
 - Currently
 - Plan to use in the future
 - Just exploring

Competency Models Address Key TM Issues

"The ability to make good decisions regarding people represents one of the last reliable sources of competitive advantage, since very few organizations are good at it."

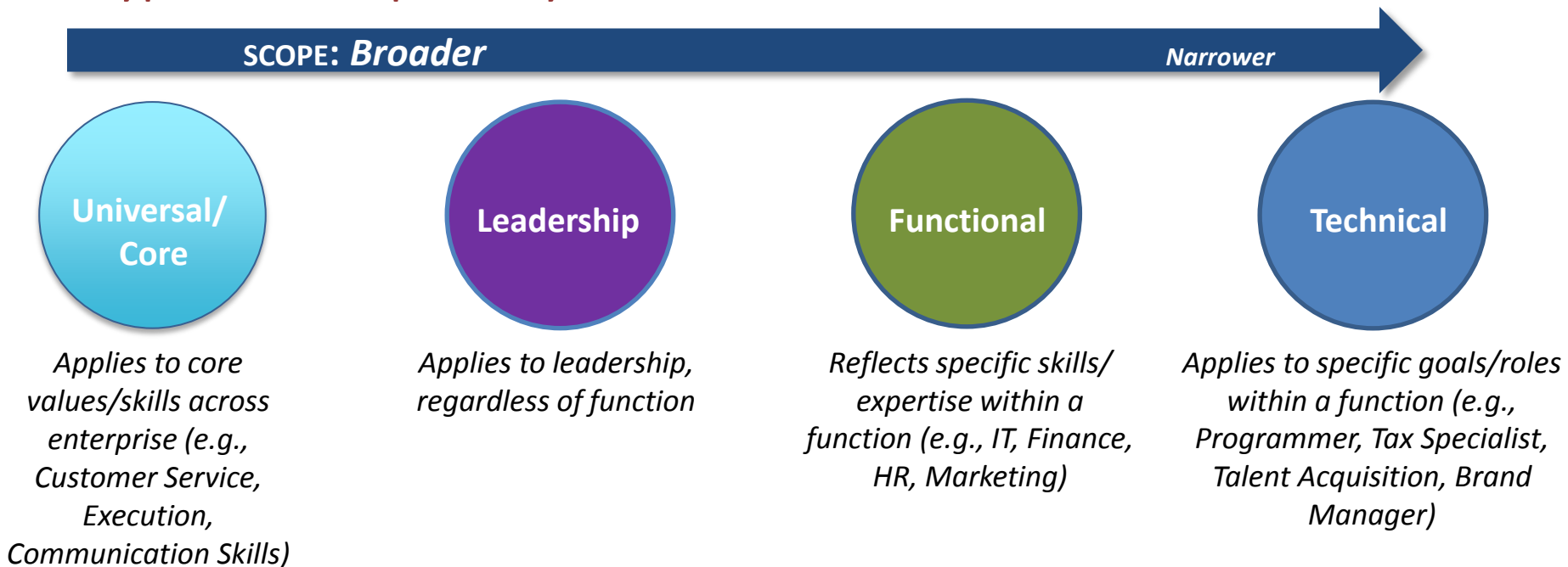
~ Peter Drucker

... and Competency Models help:

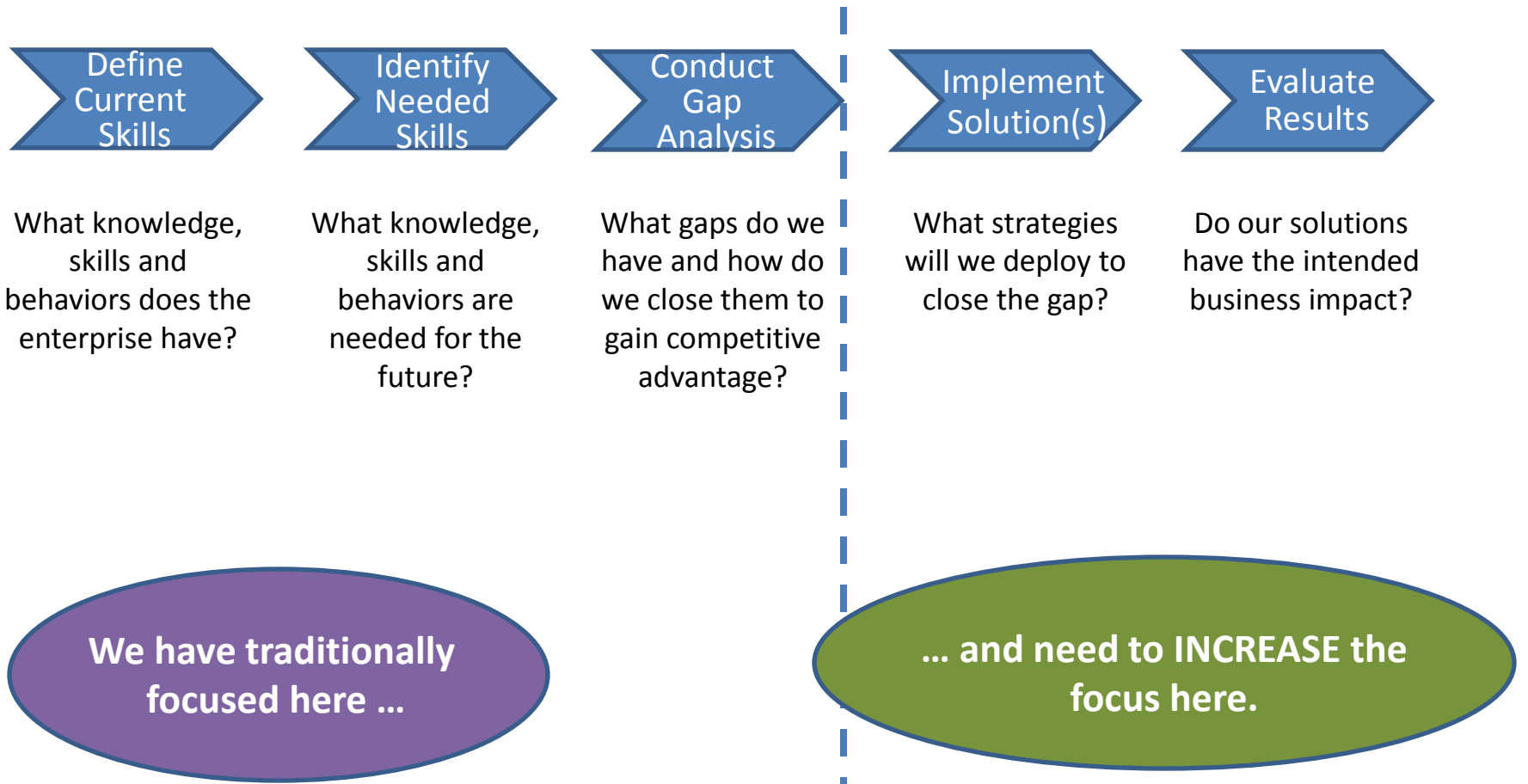
- align HR practices to strategy,
- ensure culture and values are reflected in HR systems,
- provide a framework for building future leaders, and
- assess and develop talent and potential of your workforce.

Competency Models: Definition & Types

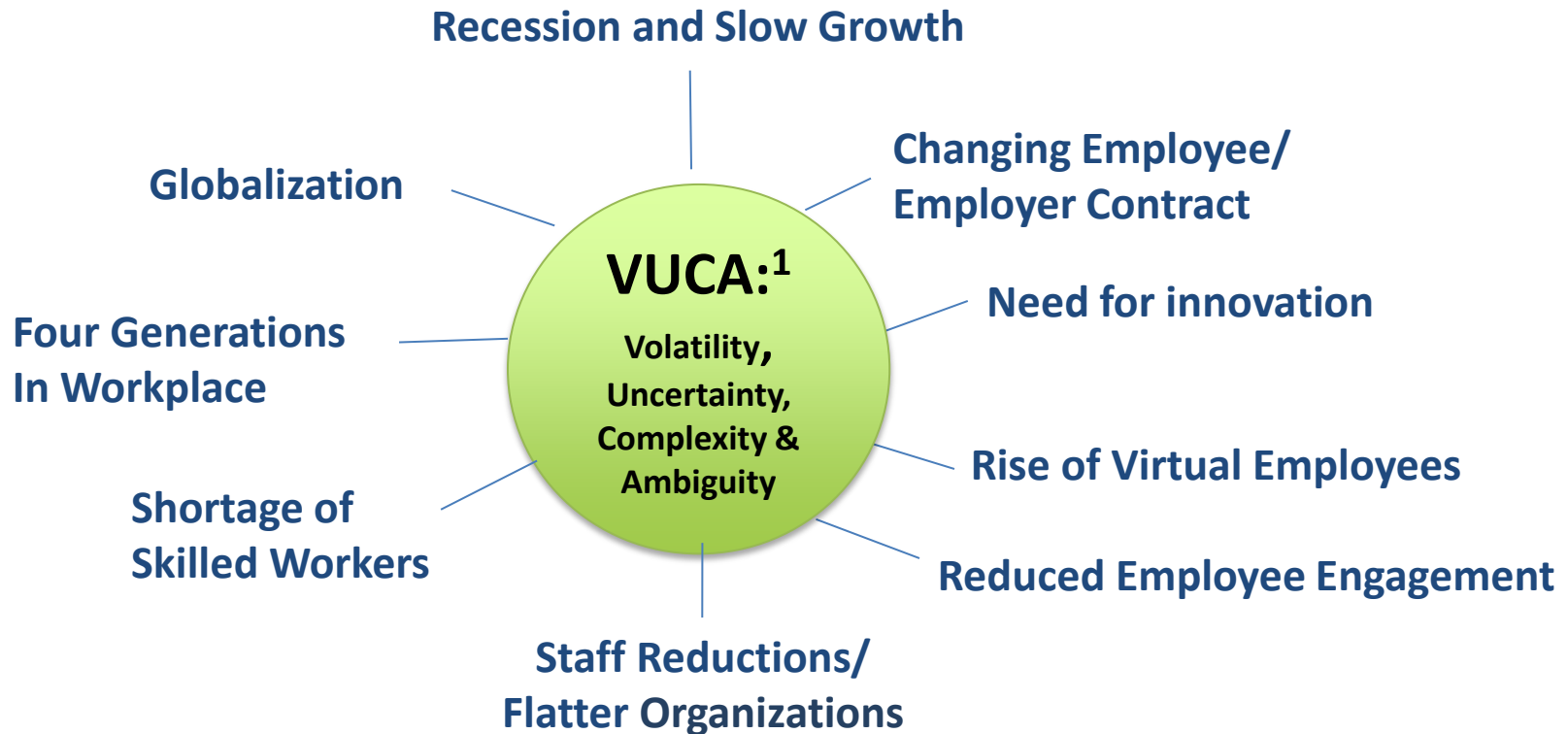
- **Definition:** Effective management of knowledge, skills, abilities, attitudes and personal attributes of employees to optimize business results.
- **Types of Competency Models:**



Evolution of Competency Model Applications



VUCA: A Few Examples



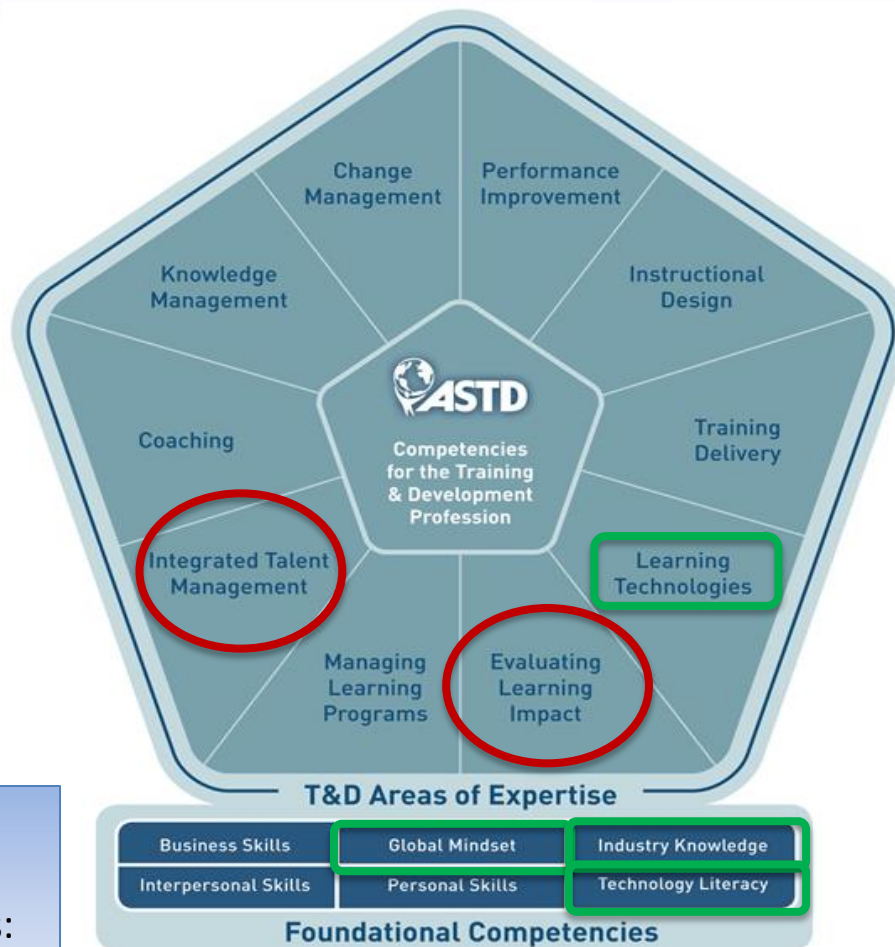
¹ Army War College terminology

VUCA times means that T&D needs to adjust **what** and **how** learning services are provided.

A few examples:

- Flatter, more matrixed organizations → Collaboration Will/Skill
- Emphasis on cost containment → Resource Allocation/Decision Making
- Downsizing and impact on engagement → Leadership and Culture
- Shared services/demand management → New roles
- Ongoing change and uncertainty → Change Management
- Skill shortages → Training/ Just-in-time learning/ Blended learning

2013 ASTD Competency Model: Updated to Reflect Change



Areas of Expertise

Foundational Competencies

Key

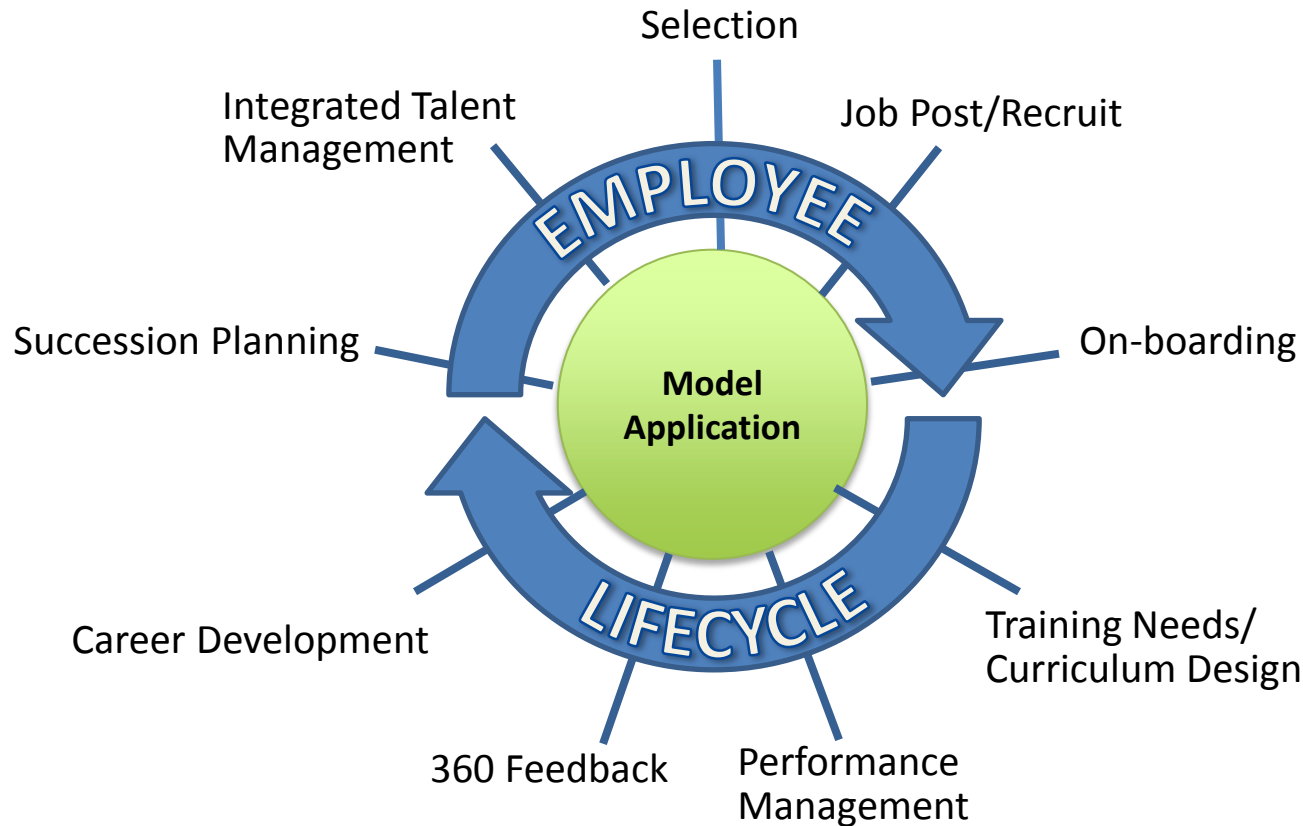
New: **GREEN**

Different Emphasis:

RED

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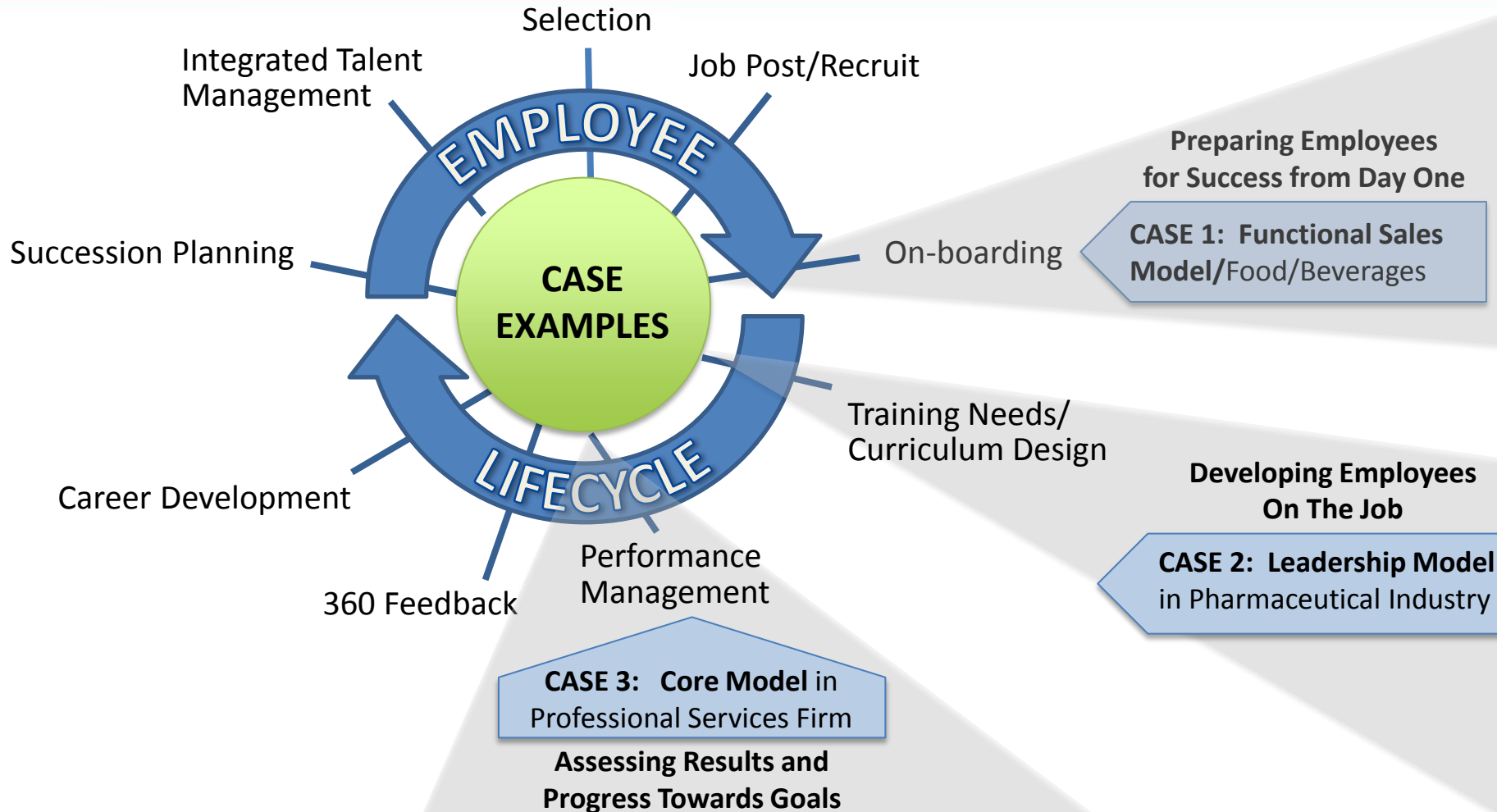
Competency Model Development Applications



Quick Poll

- If your organization uses competency models, what are the current applications? (Click all that apply):
 - Selection
 - Training
 - Measure
 - Performance Management
 - Career Development
 - Succession Planning
 - All of the above: Integrated Talent Management

Applications: Case Examples



Case 1: Onboarding Based on Functional Sales Model

BUSINESS ASSESSMENT TOOL
INSTRUCTIONS

This assessment tool is aligned with the GM Competencies of: Growing the Topline, Accelerate Service & Productivity and Build the Best Place to Work, and is designed to provide you with a 360-degree view of key business levers in your new facility. It has five sections: 1) Instructions; 2-4) Assessment Tools; and 5) Summary Analysis. It consists of 90 questions that are completed over your first 90 days in the facility. You will complete this tool in preparation for a discussion with your VPGM regarding your analysis of the state for your facility, along with an action plan for moving forward.

When scoring your facility, be as accurate and honest as you can, based on the data you collect. You have "inherited" an existing building which comes with its own history, as well as strengths and weaknesses; you don't have control over the state of this building when you are promoted into the role. What you do have control of is your analysis of the facility and your judgment about the implications for you as a new leader. You will win in this facility in a number of ways: leveraging existing strengths (Exceeds Standard); developing capabilities to raise performance for factors rated "At Standard" today; or making a measurable impact to improve a "Below Standard" opportunity.

SCORING
The color-coded scoring is: Exceed Standard (ES:10-8); At Standard (S: 7-5); or Below Standard (BS:4-1), based on your perspective of the relative strengths and weaknesses of the facility you are now leading. You can access scoring ranges, based on the 10-point scale, through drop down menus. There are 90 questions overall in the Tool. Your manager may clarify business priorities for your first 90 days in this Assessment Tool by clicking on Manager Priorities with a BLUE X.

RUN ASSESSMENT TOOL
This spreadsheet contains macros, if you were prompted about this when you opened this file, ensure you selected 'Enable Macros.' If you were not prompted about this and can only see this sheet, then your macro security is set too high. To correct this, simply choose Tools | Macro | Security, and select 'Medium' security. You will then need to re-open the file.

To score your facility on any category, select the cell below the relevant rating ('At Standard' etc.) for a dropdown menu to choose your score out of the 10-point scale. If you click on 'View Chart' on the Summary Analysis tab, you will get a color-coded chart that displays your facility ratings graphically. You may print these charts by clicking on Control/P simultaneously.

SOURCES OF DATA
To complete the assessment, you will access four primary resources: 1) PBC source documents (such as: MyPBD, Org Health Survey, Customer Connect); 2) discussions with MU Resources (such as: HR, KAM, MEM, etc. - these are listed within the tool where relevant); 3) your direct observation of facility functioning; and 4) business reporting; (such as GMI, INI, etc.).

DEFINITIONS
Three major assessment areas are based on the GM Competency Levers (Grow The Top Line, Accelerate Service & Productivity and People Leadership). Within each competency lever, there are 10 Dimensions (such as: Front-Line Staffing and Leadership Development within Leading Our People: Before the Store and In the Store for Cost Productivity). Each dimension has three Success Factors that drive results.

COMMENTS
Next to each key Success Factor is a drop down box for comments. Use this space to identify questions you plan to discuss with your VPGM, as well as background and rationale for your scoring.

SUMMARY ANALYSIS
This roll-up of all your facility data will reveal the average competency score hold inventory segregated from full goods overview for each competency level of Top 5 facility Strengths.

Inventory Counts
- Receipt of UTCs properly documented; truck cabs audited for UTCs; UTCs destroyed after processing

Facility Layout
- Receipt of UTCs properly documented; truck cabs audited for UTCs; UTCs destroyed after processing

Break/ODD/Shrink
- Receipt of UTCs properly documented; truck cabs audited for UTCs; UTCs destroyed after processing

Check In / Out Process
- All products are processed through the Handheld - donations, EE sales, sample tickets

Summary Analysis Data:

Category	Rating	Score
Overall Average	7.0	7.0
Over B Shorts	At Standard	5.0
End of Day	At Standard	5.0
Cost & Control Audits	At Standard	5.0
Break/ODD/Shrink	At Standard	5.0
Inventory Counts	At Standard	5.0
Facility Layout	At Standard	5.0
Check In / Out Process	At Standard	5.0
Large Format Retail Sales	At Standard	5.0
Small Format Retail Sales	At Standard	5.0
Food Service Business Performance	At Standard	5.0
Business Development & Returns	At Standard	5.0
Volume	At Standard	5.0
Price & MC	At Standard	5.0
Planning & Forecasting	At Standard	5.0
Cashiering & Settlement	At Standard	5.0
Warehouse Inventory	At Standard	5.0
Check In / Out Process	At Standard	5.0
Full Service Vending & HDK Inventory Cost	At Standard	5.0
Productivity	At Standard	5.0
Warehouse, MEM, Fleet Operations	At Standard	5.0
Before The Store	At Standard	5.0
In The Store	At Standard	5.0
After The Store	At Standard	5.0

Summary Analysis Summary:

Competency	Top 5 Success Factors
Growing the Topline	1. Foodservice New Business 2. SF ADP 3. Operation / OOD Partnerships
Service & Productivity	1. Break/ODD/Shrink 2. End of Day 3. FSU Controls & Audits
People Leadership	1. New Hire On-Boarding: Safety 2. ...

- Diagnose key business challenges/top priorities
- “Zoom in/Zoom out” to gain full picture
- Align with manager on key priorities

Case Example 2: Curriculum Blueprint Mapped to Leadership Model

CLIENT: Global Pharmaceutical Company
Competency-Based Country Manager Curriculum Framework

GLOBAL CURRICULUM

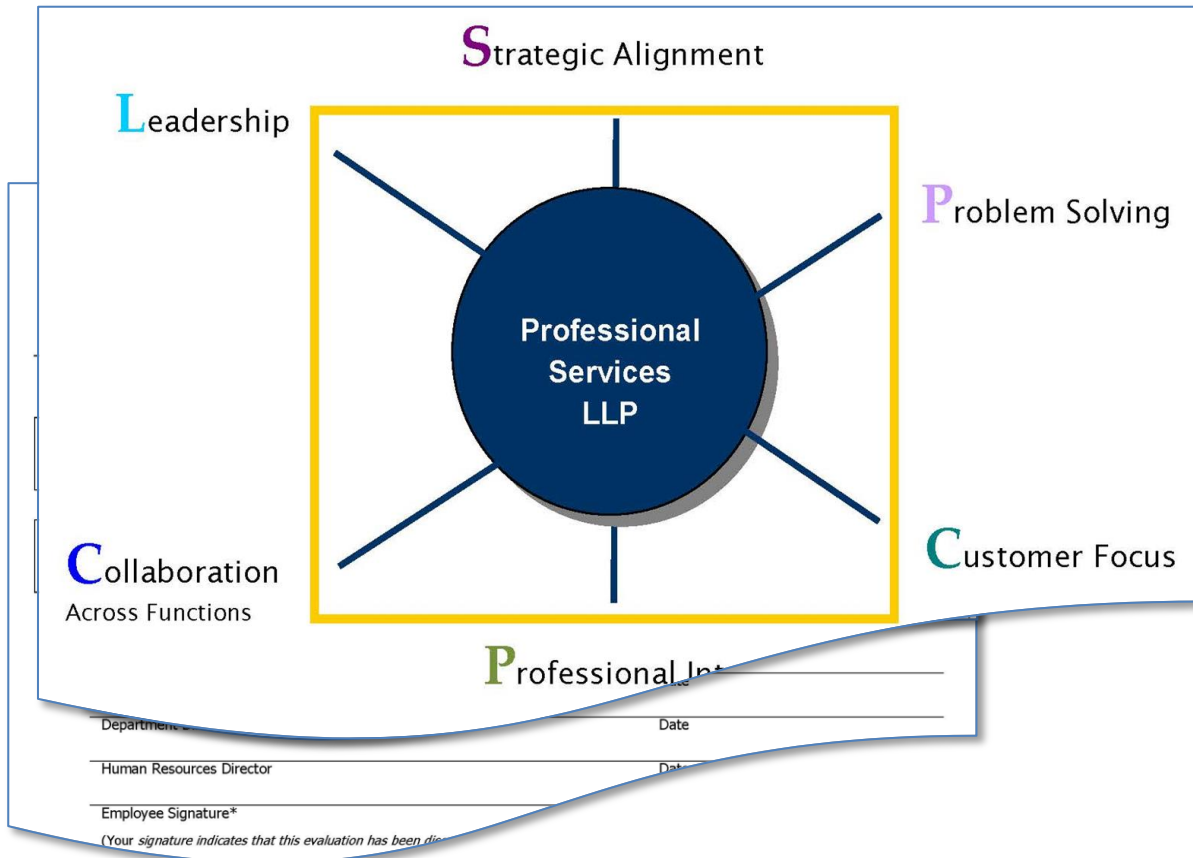
LEVEL/ TENURE	Skill Assessment	On-Boarding	Peer Coaching	Country Review	Leading Strategically	Manage P&L	Influence External Stakeholders	Matrix Leadership	Innovation/ Performance	Talent Management
<i>Pre-Promotion</i>	[LINK]		[LINK]	[LINK]						
<i>Newly-Promoted</i>		On-boarding Dashboard	[LINK]	[LINK]	Strategy Realization	Understand Financial Statements	Map the Political Environment	Build Partnerships	Innovation in Teams	[LINK]
<i>CM Incumbent</i>			[LINK]	[LINK]	Strategic Thinking	Rating Analysis	Building KOL Relationships	Organizational Savvy	Promoting High Performance	Coaching and Feedback

Solutions:

- Blended Learning
- Leverage existing resources
- Establish priorities and buy-in
- Delivered Globally

Core, Common, Critical
 * Assessment-Based
 • High Priority

Performance Management based on Core Model



- BARS
- Provide PMP training

Additional Applications

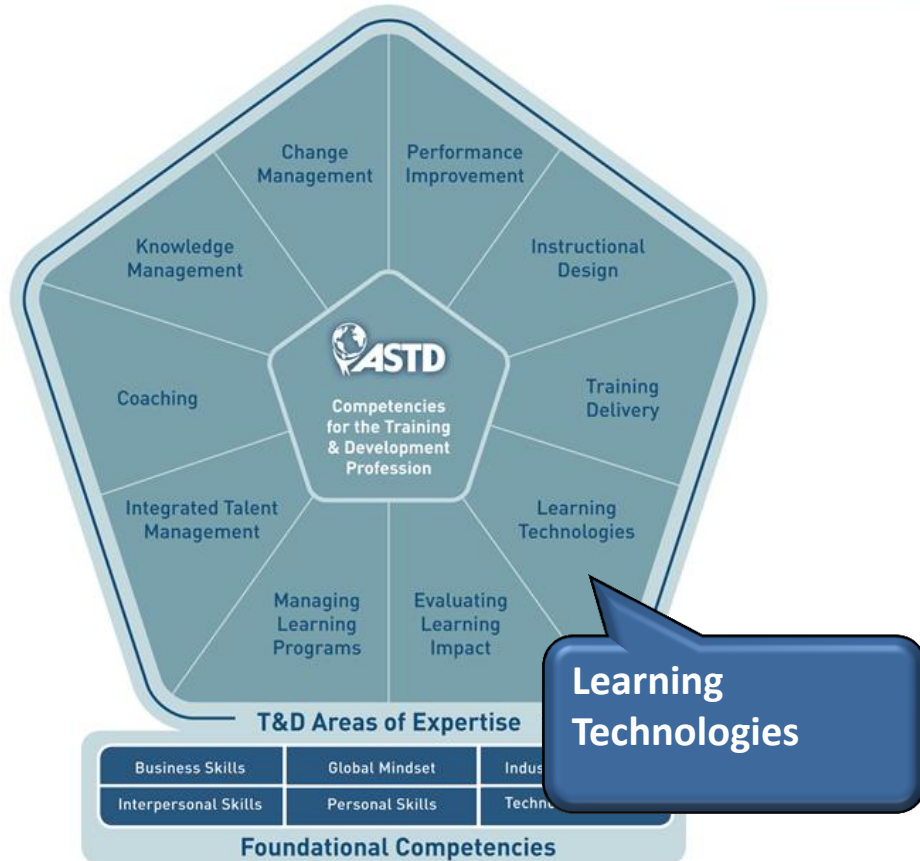
- 360 Feedback
- Training Needs Assessment
- Resource Guide

“VUCA” Workforce Planning

COMPETENCY	<i>Demand</i>		<i>Supply</i>
	Currently Required	Required in Future Role	Currently Available: Yes/No
Business Acumen			
Innovation			
Learning Agility			
Adaptive Leadership			
Collaboration			
Cross-Cultural Literacy			

- **What about you and your professional aspirations?**

Examples: Newly Focused Competencies Required in the T&D Profession



Learning Technologies

Apply a variety of learning technologies to address specific learning needs.

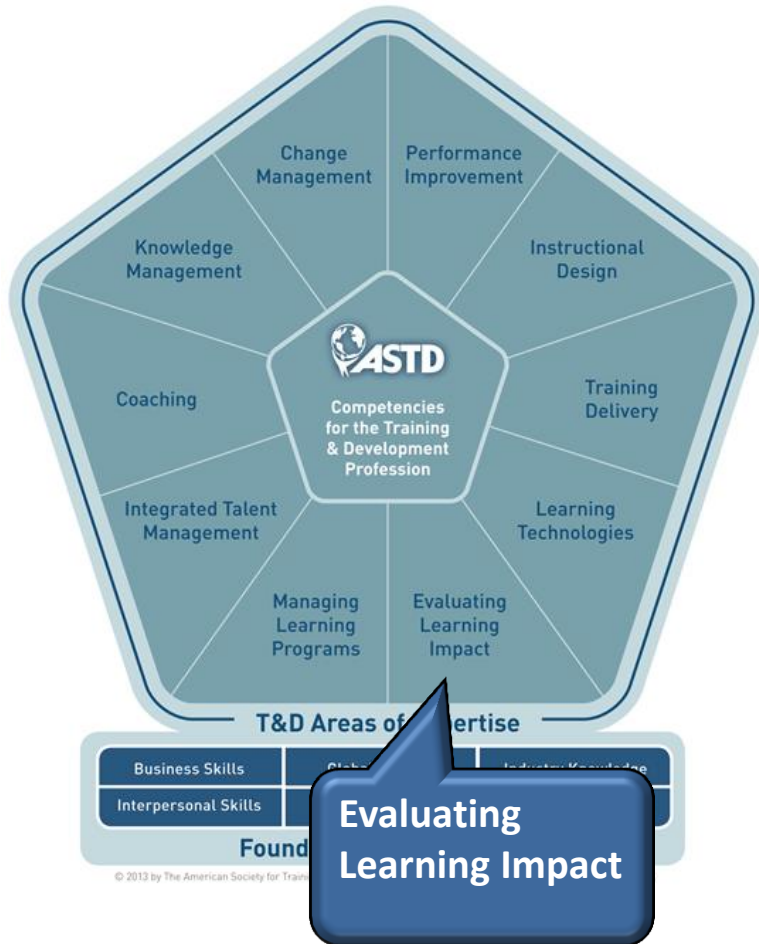
Be able to:

- Use technology effectively across the different areas of expertise
- Identify when and how to use technology as a training and development solution

“Staying abreast of new and emerging technologies and matching the appropriate technology to a specific learning opportunity or challenge.”

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Newly Focused Competencies: Evaluating Learning Impact



Evaluating Learning Impact

Use learning metrics and analytics to measure the impact of learning solutions

Be able to:

- Identify customer expectations
- Select appropriate strategies, research design, and measures
- Communicate and gain support for the evaluation plan
- Manage data collections
- Analyze and interpret data
- Apply learning analytics
- Make recommendations to aid decision-making

Newly Focused Competencies: Integrated Talent Management



Integrated Talent Management

Build an organization's culture, capability, capacity, and engagement through people development strategies.

Be able to:

- Align talent management to organizational objectives
- Use talent management systems
- Equip managers to develop their people
- Organize delivery of developmental resources
- Promote high-performance workplaces
- Coordinate workforce and succession planning
- Facilitate the career development planning process
- Facilitate career transitions
- Support engagement and retention efforts
- Implement individual and organizational assessments
- Use talent management analytics to show results and impact

ASTD Model: Three Key Themes

HOW OUR ROLE HAS EXPANDED:



- We are builders of learning communities.
- We are cross cultural communicators.
- We are content curators.

HOW WE DELIVER VALUE:



- We employ a variety of delivery methods.
- We leverage informal and formal approaches.
- We strive to leverage technology fully and appropriately.

HOW WE STAY RELEVANT:

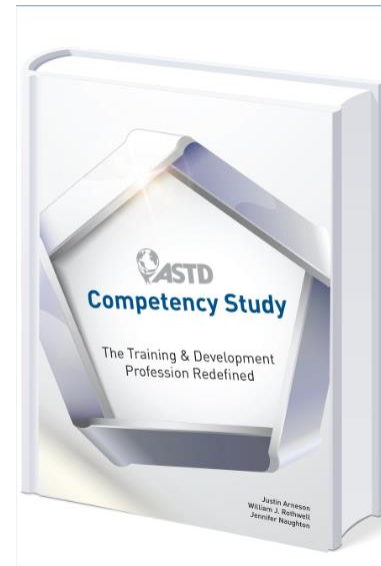
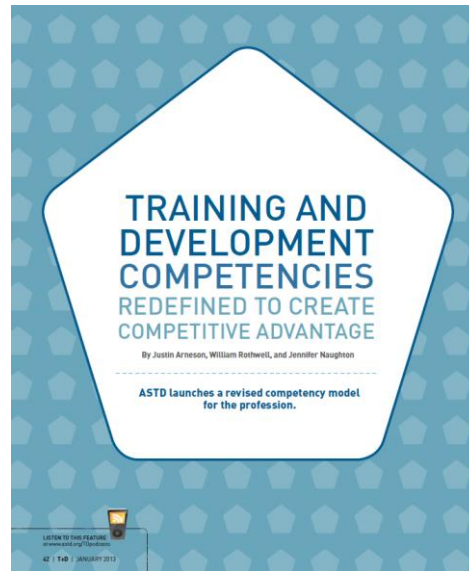


- We are business leaders.
- We measure the impact of learning.
- We provide evidence of value and impact to our organizations.

ASTD Model Poll: Your Top 3 Strengths and Skill Gaps for New/Different Competencies

Strength/Skill	Skill (+)	Gap (-)
Integrated Talent Management		
Evaluating Learning Impact		
Learning Technologies		
Global Mindset		
Technology Literacy		
Industry Knowledge		

ASTD Resources



www.astd.org/model

ASTD Career Job Aids

Assess your skills and create a development plan to close your skill gaps. Recommended resources provided at your fingertips.



www.astd.org/careernavigator

ASTD Career Job Aids

Create your own customized action plan www.astd.org/model.

1. Complete the “Action Planning for individuals” job aid.
2. Discuss the results with a mentor or your leadership.

www.astd.org/model

Example: Development Planner

Part 1

- 0 = Not applicable**
- 1 = Not at all important**
- 2 = Somewhat important**
- 3 = Important**
- 4 = Very important**

Foundational Competencies		How Important to Your Job?					What Are Your Professional Development Needs?				
		0	1	2	3	4	0	1	2	3	4
1	Business skills	0	1	2	3	4	0	1	2	3	4
2	Industry knowledge	0	1	2	3	4	0	1	2	3	4
3	Technology literacy	0	1	2	3	4	0	1	2	3	4
4	Personal skills	0	1	2	3	4	0	1	2	3	4
5	Interpersonal skills	0	1	2	3	4	0	1	2	3	4
6	Global mindset	0	1	2	3	4	0	1	2	3	4

List your priorities for professional development on these competencies:

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FOR YOUR ORGANIZATION

- Align with strategic aspiration and VUCA dynamics in your industry/organization
- Determine what the implications are for your service delivery
- Create/refresh competency models to reflect this new reality & requirements
- Integrate in multiple talent management applications for greatest impact

FOR YOUR CAREER

- Benchmark against T&D industry standards
- Determine your career aspirations
- Identify your strengths and skill gaps
- Design and implement your development plan

- What are your questions/comments?

What ASTD webcasts focused on competency models would you like to attend in the future:

Click all that apply:

- Using the ASTD Competency model to develop my career
- Deep dive case study on organizational applications
- Help developing competency models in my organization
- Other (use Chat box)

- *Lessons Learned: Using Competency Models to Target Training Needs*, Marjorie Derven, [T+D Magazine](#)
- [The 2013 ASTD Competency Model: Training and Development Competencies Redefined](#), Arneson, J., Rothwell, B., & Naughton, J., ASTD Press
- [The Executive Guide to Integrated and Talent Management](#), Oakes, K. and P. Galagan , ASTD Press
- [One Page Talent Management](#), Marc Effron, HBR Press
- [HARVARD BUSINESS REVIEW](#), The Talent Issue, October 2011
- *Managing the Matrix in the New Normal*, Marjorie Derven, [T+D Magazine](#)
- [The New Social Learning](#), Bingham, T. and Conner, M.
- *ASTD Career Navigator* (www.astd.org/careernavigator)
- *ASTD Development Planning* (www.astd.org/model)
- [ASTD Handbook for Workplace Learning Professionals](#), Biech, E., ASTD Press

**GOOD LUCK WITH YOUR
COMPETENCY MODEL INITIATIVES!**

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