

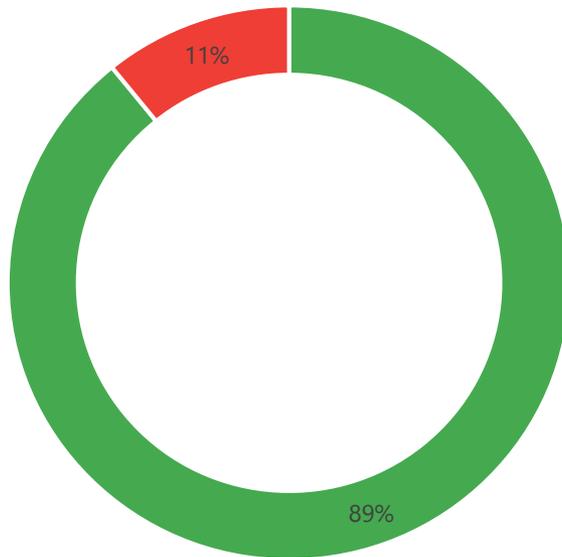
# How to Use Standard Competency Models to Accelerate Learning Transfer

Presented By:  
Cheryl Lasse, SkillDirector



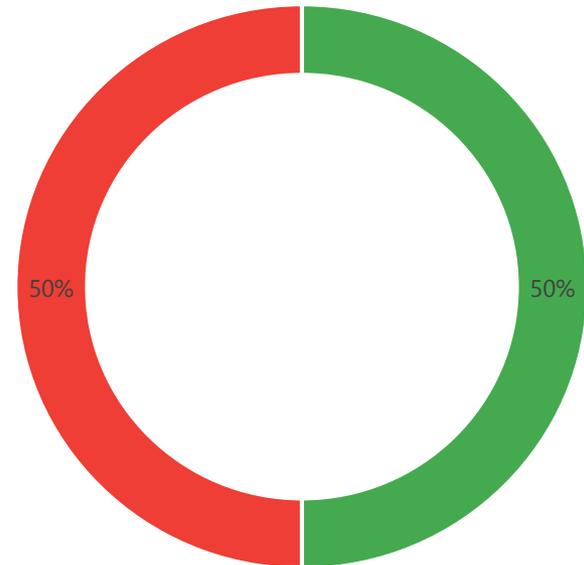
# What do your organizations expect?

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



■ Yes ■ No

Do you use competency models to drive professional development?



■ Yes ■ No

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

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1

Create a competency model

2

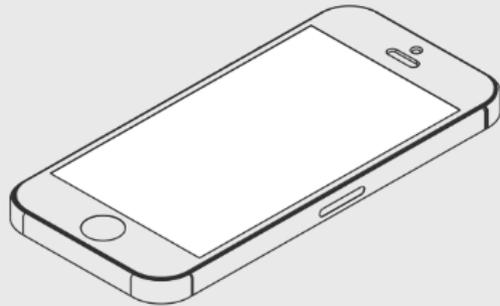
Make it actionable

3

Accelerate learning transfer

# Word cloud

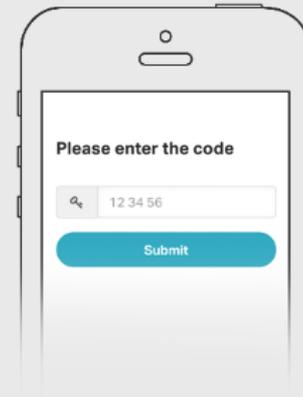
Go to **www.menti.com** and use the code **95 47 24**



**1** Grab your phone

www.menti.com|

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



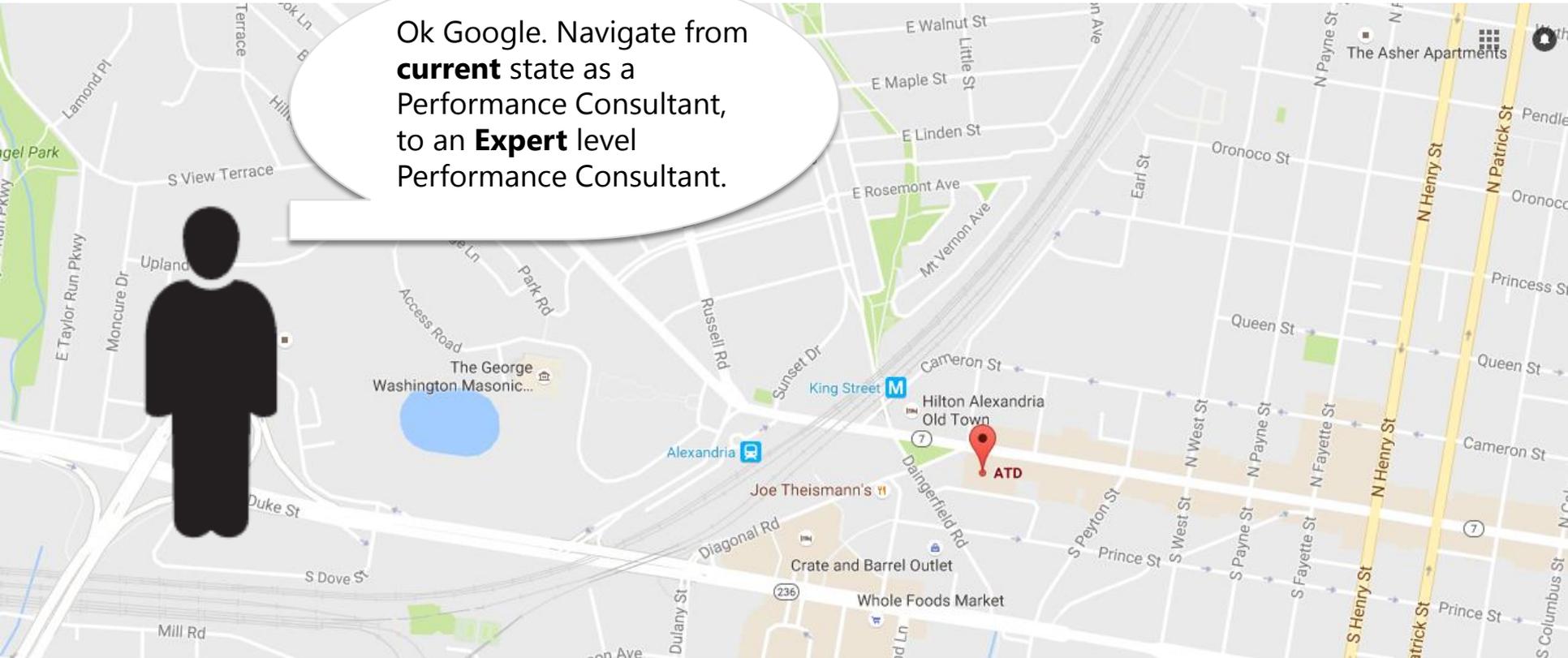
**3** Enter the code  
**95 47 24** and vote!

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



# Competency Models

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



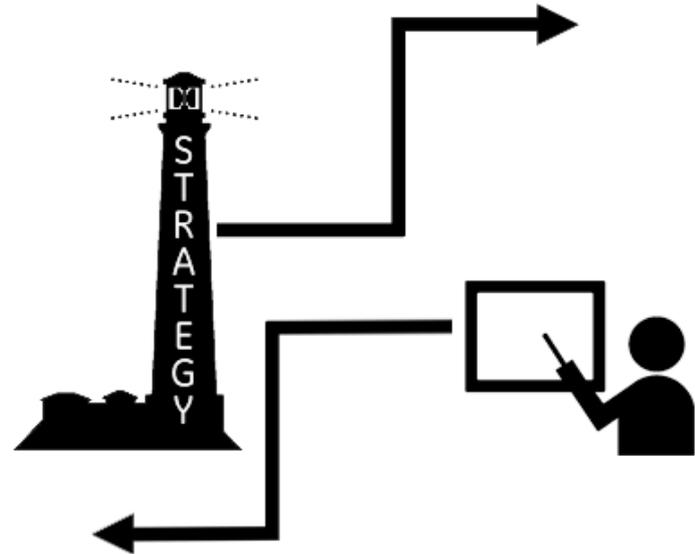
# Competency Models

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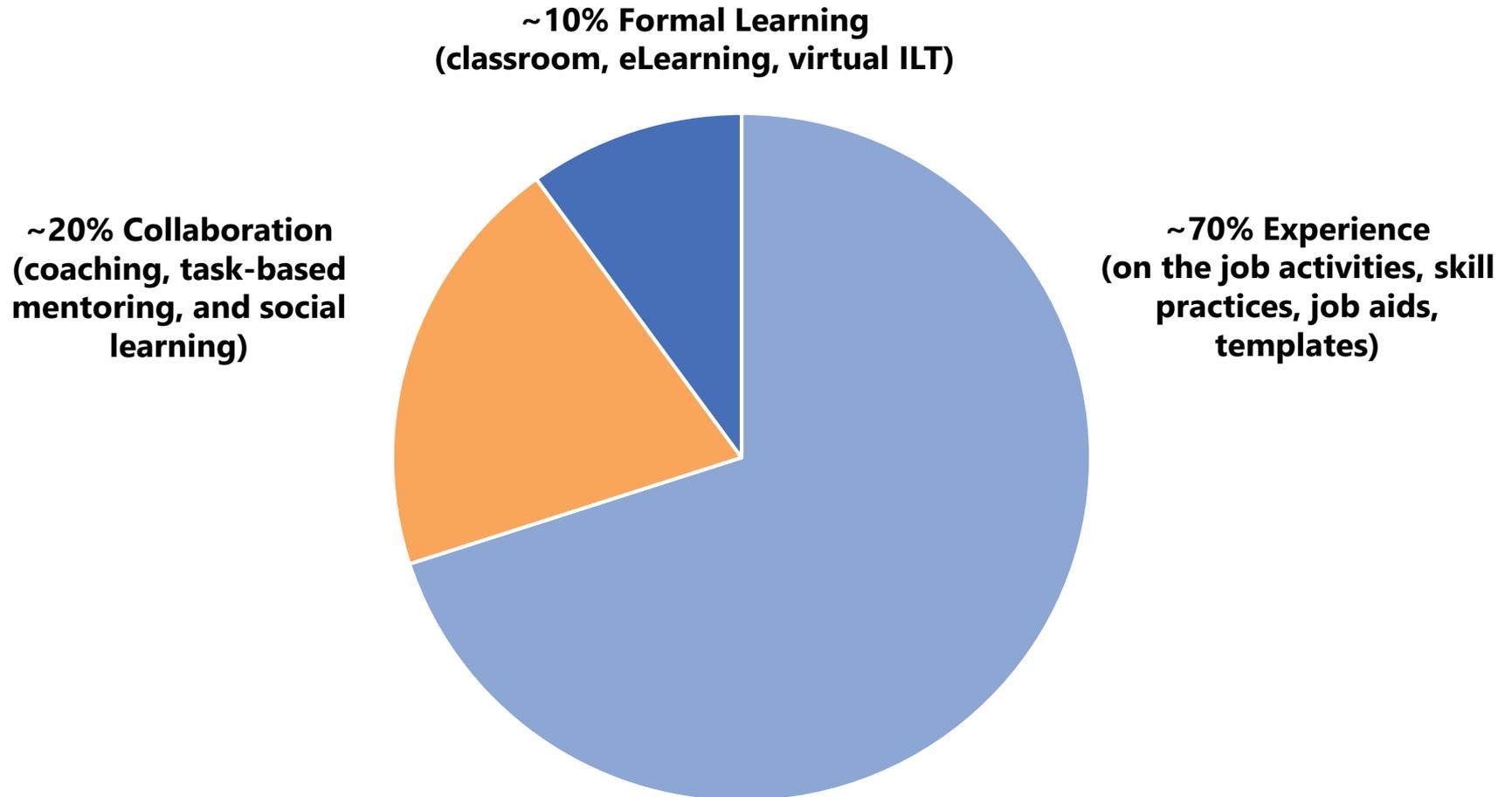


**The competency model for each role defines the skills required to accomplish the strategy**

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



# Definition: Learning Opportunities



# 1) Create a competency model

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## 3 easy ways to get one

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

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

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

# What a competency model should include

## Consistently deliver customer-focused presentations

### Communication

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

Tasks/skills grouped into competencies or task categories

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

A target level of proficiency

# Map learning opportunities to skills in model

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

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

# What a competency model should include

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

Individual Competency

Tasks/skills grouped into competencies or task categories

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

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

A target level of proficiency

Training Activity Description

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

Mapped learning opportunities

# Components of custom and standard models

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

## When to use a custom vs. standard model?



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

## Custom vs. Standard

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

# Components of a Standard Competency Model



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

# Components of a Standard Competency Model

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

## Instructions

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

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

# Components of a Standard Competency Model

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For the skill: Staff and Career Development

Job Description	Target
HR Consultant	3
HR Consultant, Junior	3
Human Resources Director	4
<b>Human Resources Manager</b>	<b>4</b>

# Components of a Standard Competency Model

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

# How do you use the standard model?



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

Task/Skill	Task Example Link	Target	In Model?	Updated Target (if applicable)
Staff and Career Development	<a href="#">View</a>	4	Y	

# Timeline for building a custom competency model



Wk 1

**Monday**  
Rapid JTA  
Workshop

**Tuesday**  
Rapid JTA  
Workshop

**Wednesday**  
Rapid JTA  
Workshop

**Thursday**  
Identify task  
examples

**Friday**  
Identify task  
examples

Wk 2

**Monday**  
Identify task  
examples

**Tuesday**  
Identify task  
examples

**Wednesday**  
Identify task  
examples

**Thursday**  
Identify task  
examples

**Friday**  
Identify task  
examples

Wk 3

**Monday**  
Identify task  
examples:  
conduct  
workshop

**Tuesday**  
Identify task  
examples:  
polish  
output

**Wednesday**  
Perform task  
proficiency  
analysis

**Thursday**  
Summarize/  
present

**Friday**



# Timeline for using a standard competency model



Wk 1

**Monday**

Export and send  
to leaders

**Tuesday**

Leaders  
perform review

**Wednesday**

Get feedback  
from leaders



**Thursday**

**Friday**

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

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1

Create a competency model

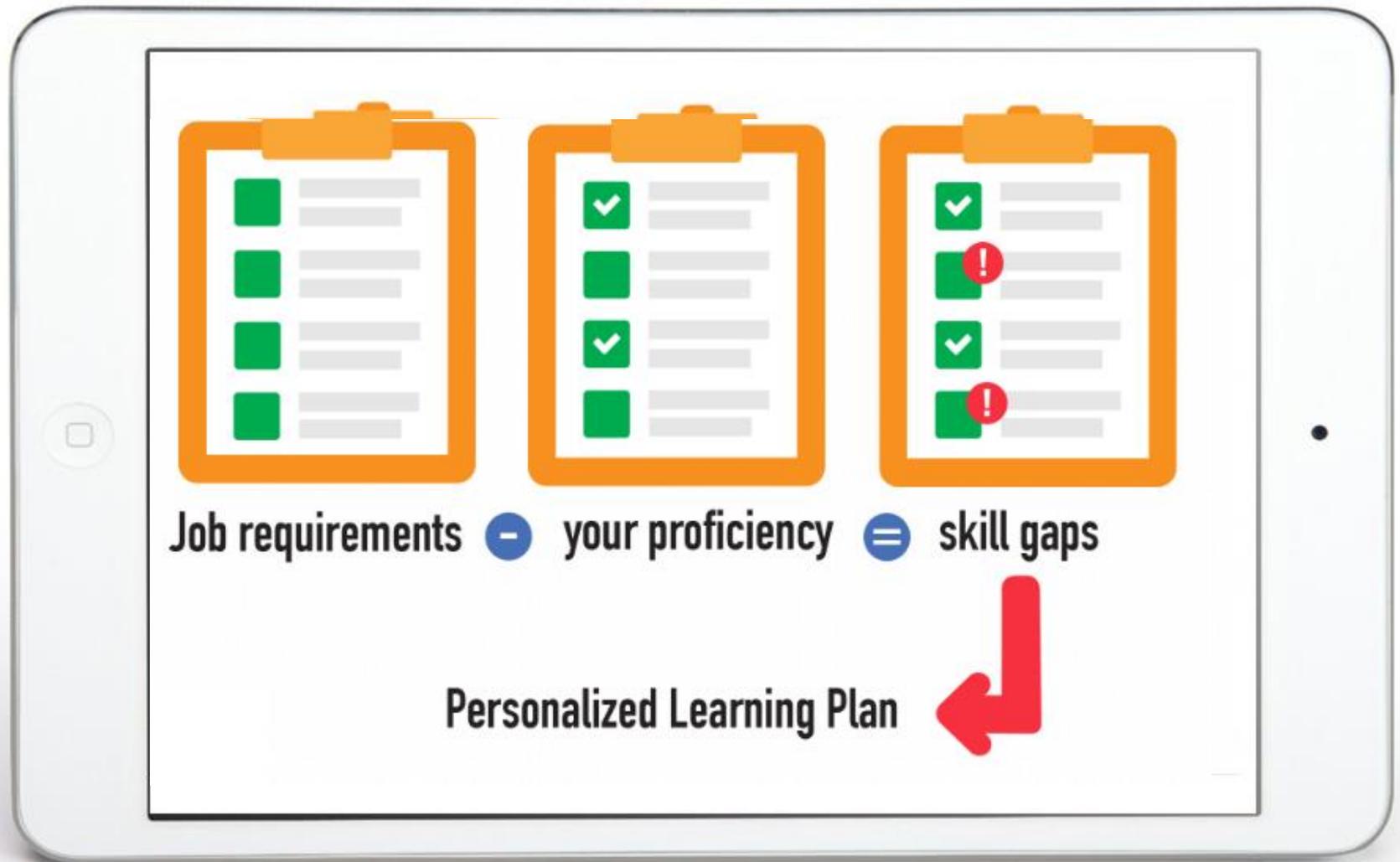
2

Make it actionable

3

Accelerate learning transfer

## 2) Make your competency model actionable



## 2) Make your competency model actionable

atd CAREER NAVIGATOR Career Navigator

Hi, Cheryl Logout

Self-Assessment Career Planning Career Navigator Resources

### Member Assessment

Help Tutorial

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

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

Submit Save Cancel

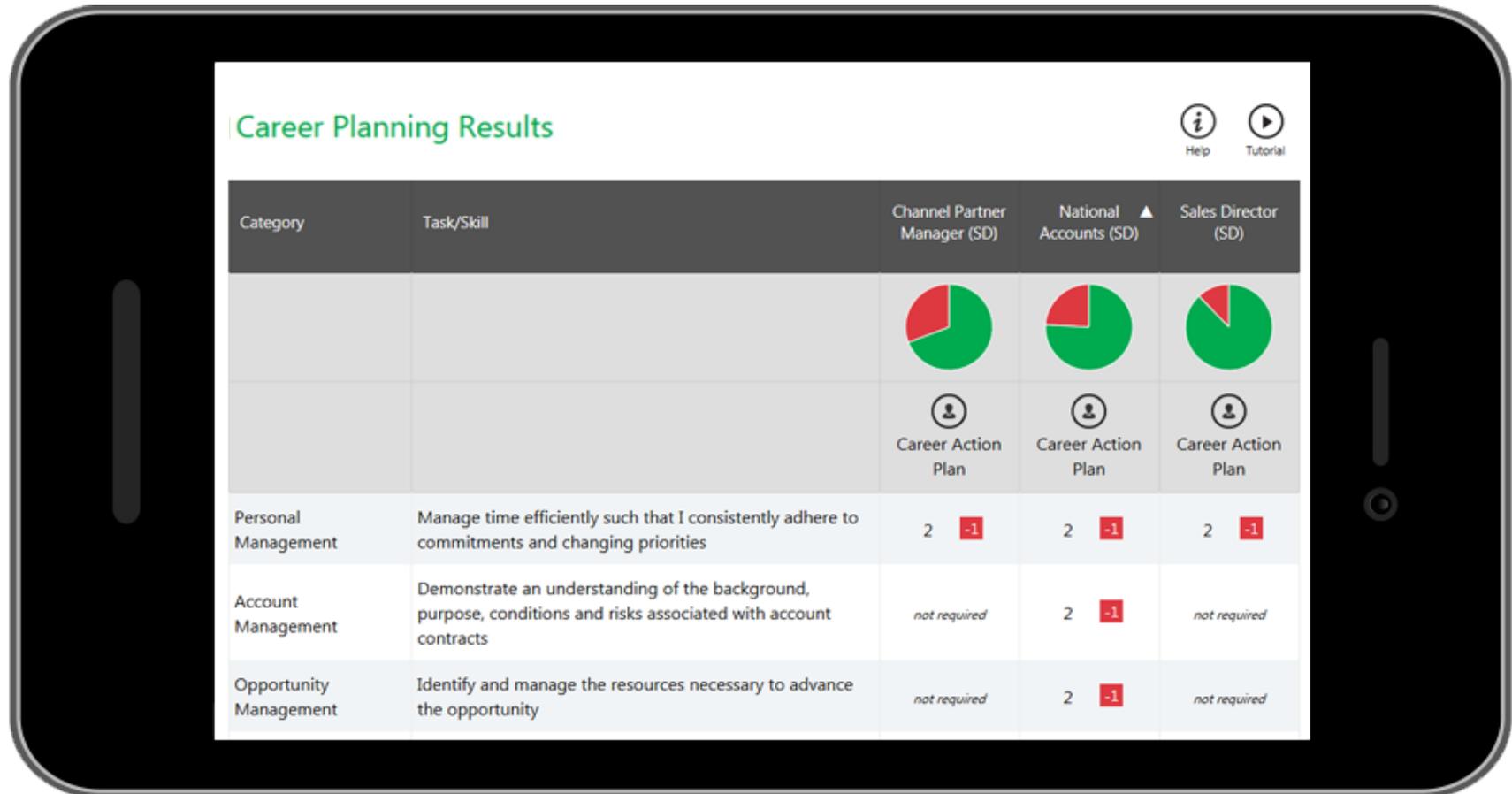
Competency	Task/Skill	N/A	No to Little Proficiency	Limited Proficiency	Consistent Proficiency	Advanced Proficiency	Exceptional Proficiency
Assess if relevant (you may leave blank if N/A)							
Business Skills	Uses data from a variety of sources to analyze needs and proposes solutions	<input type="radio"/>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

## 2) Make your competency model actionable

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

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

## 2) Make your competency model CAREER actionable



### 3) Accelerate learning transfer

Assessment Results: Personalized Learning Plan

Submit Cancel Evaluation Detail Refresh Activities

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

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

### 3) Accelerate learning transfer

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# 70

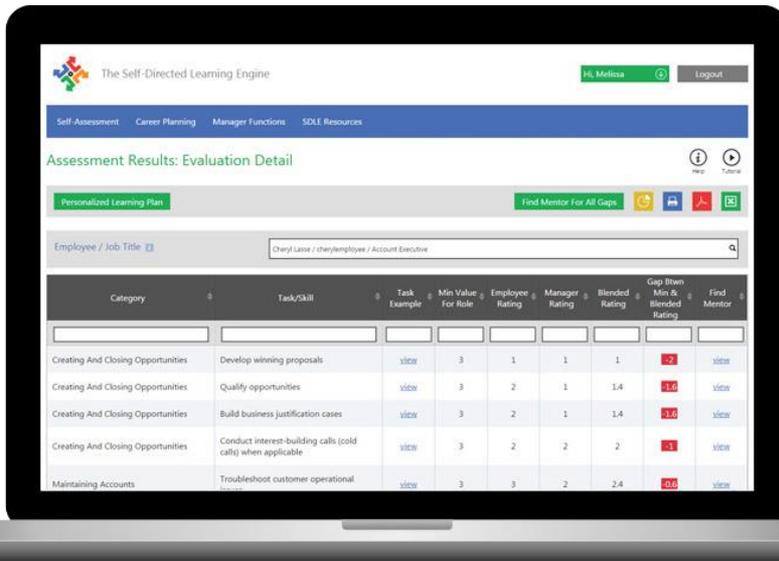
- ✿ If your standard model contains mapped activities, determine which to keep
- ✿ Customize, tailor or add additional ones

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

### 3) Accelerate learning transfer

# 20

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



Min Value For Role	Employee Rating	Manager Rating	Blended Rating	Gap Btwn Min & Blended Rating	Find Mentor
3	1	1	1	-2	<a href="#">view</a>
3	2	1	1.4	-1.6	<a href="#">view</a>
3	2	1	1.4	-1.6	<a href="#">view</a>
3	2	2	2	-1	<a href="#">view</a>

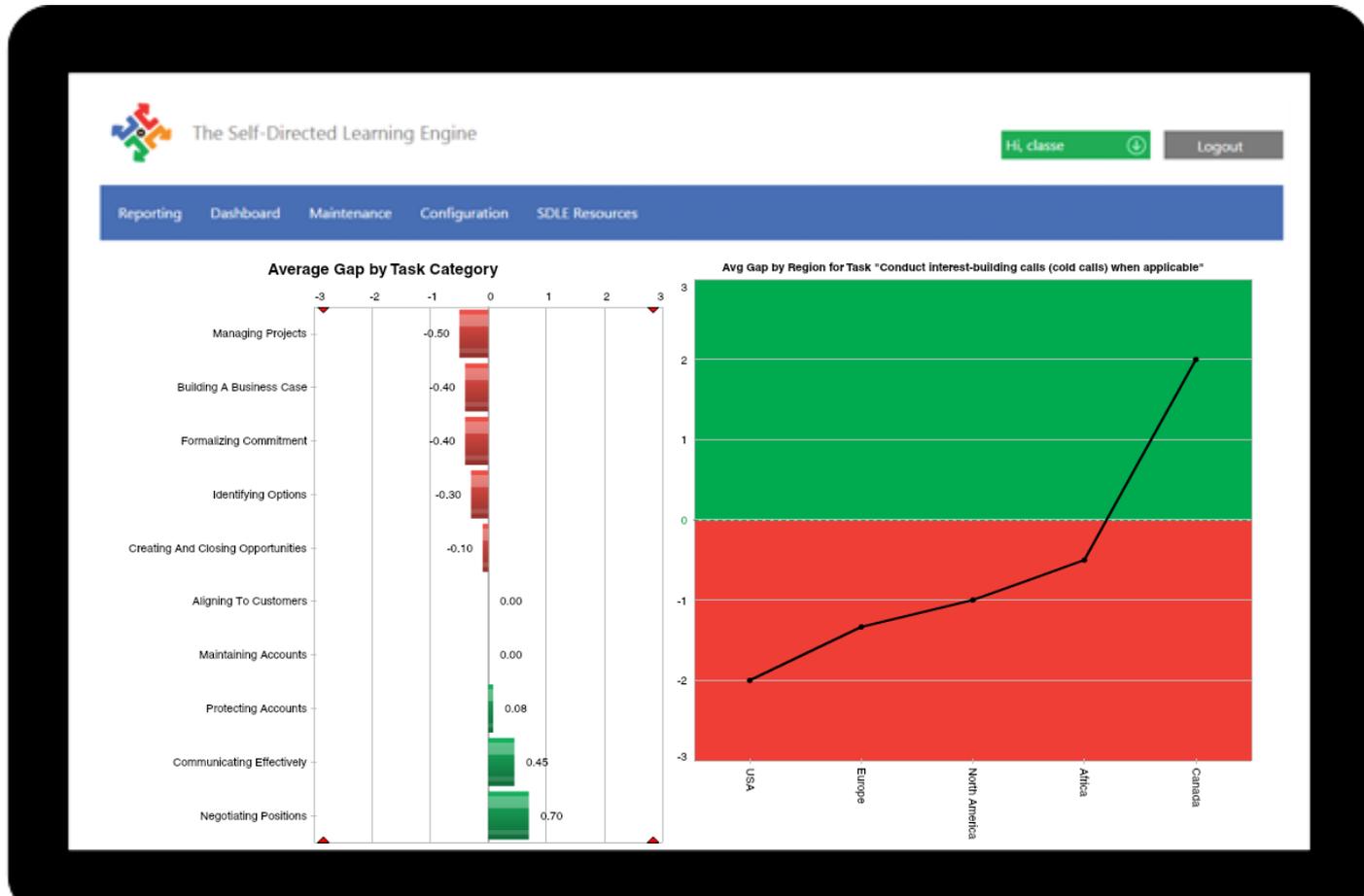
### 3) Accelerate learning transfer

10

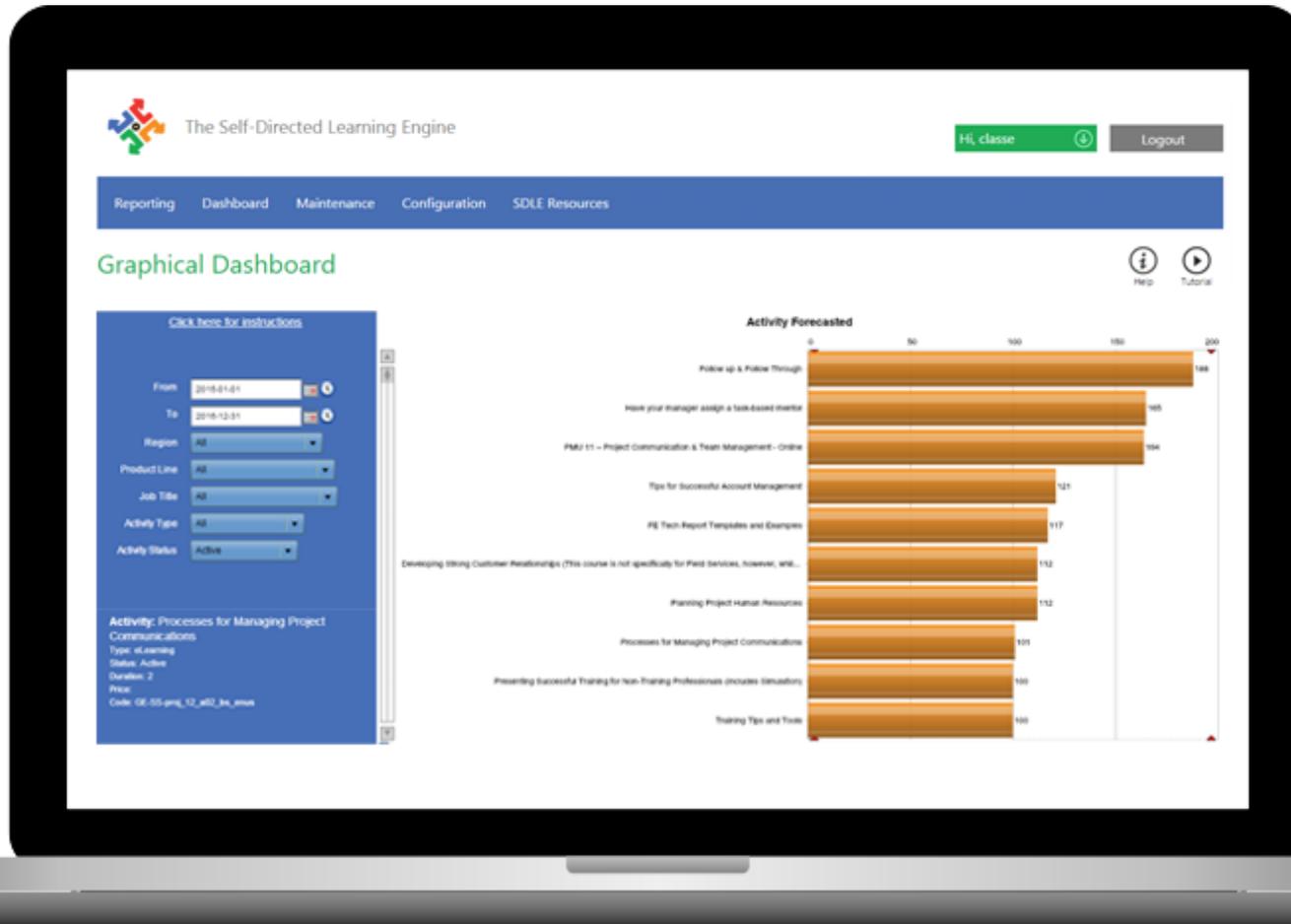
- ⚙ The formal learning you have
- ⚙ Insert placeholders for what you need “to be developed”



# Why it's good for you!



# Why it's good for you!



**Real, automated needs assessment**



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

# Answering your questions

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

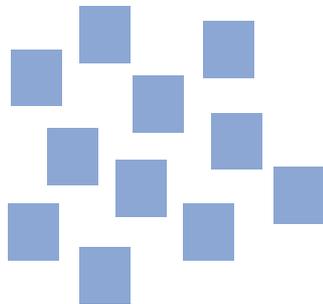


# Answering your questions

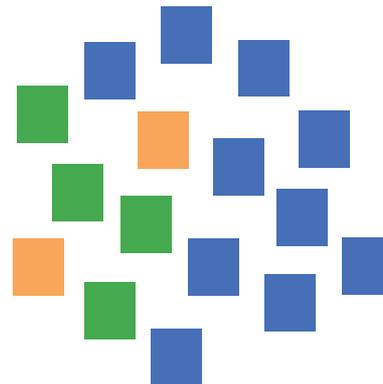
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- \* How do you create a competency model for a role that is not clearly defined?
- \* How do I make my competency model more results-oriented? How do I ensure the competency model reflects what the business actually needs and values?
- \* Does experience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

## Skills



## Learning Opportunities



# 3 steps for employees to own their development and career planning

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1

## Create a competency model

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

2

## Make your competency model actionable

- ✿ Leveraging technology to make it accessible and assessable

3

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

- ✿ Employees buy into it, managers support it

## Contact Information

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@SkillDirector



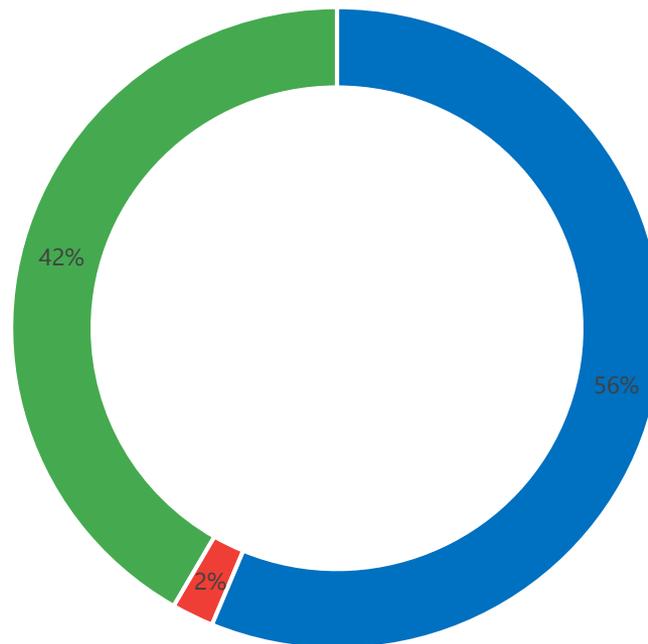
[Link to ATD Career Navigator for members](#)

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

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

# What do your organizations expect?

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



■ Build ■ Buy ■ Combination