# worktect
Blueprints for Superior Performance

# Worksheet for Planning a Competency-Modeling Project

## QUESTION TO ANSWER BEFORE BUILDING MODELS

**Your Name:**                                                    **Date:**

**Your Organization:**

# SECTIONS

# A. Scope of the Project

| Key Questions | Your Answers | Considerations |
|---|---|---|
| **A1.** For what job(s) would you like to have competency models? | | Consider budget, support, and buy-in from key line managers and key HR, leadership development and OD staff. |
| **A2.** For what job(s) do you have strong influence on whether the project happens and how. | | It's sometimes best to start with that part of the organization where you have the greatest influence. |

# B. Organizational Context

| Key Questions | Your Answers | Considerations |
|---|---|---|
| **B1.** Has the organization recently developed a mission statement, values, and a strategic plan? | | If so, it will be important to ensure alignment of the model. |

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| **B2.** Does the organization have a strong CEO or senior line leader? | | If so, it may be important to ensure that the content and format of the model reflects this leader's agenda. |
| **B3.** Is the organization going through significant change? | | If so, it may be important to gather some data about the target jobs from the change leaders and from sources outside of the organization. |
| **B4.** Have any of the jobs for which competency models are needed been recently created or significantly re-defined? | | If so, it will be important to clarify the job's responsibilities, key tasks, and performance measures and their implications for competencies that will be needed in the new job. |
| **B5.** Does the organization havestrong culture, with values that set it apart from other organizations in the same industry? | | If so, it will be important to ensure that the competency model reflects key organizational values. |
| **B6.** Is there a strong business reason to develop the competency model(s)? For example, to be able to select or develop superior performers for a mission critical role? | | If so, the business reason can aid in selling the project internally. Also, the project will need to build in the application that will achieve that business need. |

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| **B7.** Is it important for key stakeholders to put the organization's stamp on a new competency model? | | If yes, it will not do to use generic competencies developed outside of the organization, unless they are and customized for the organization. |
| **B8.** Are other competency models being used in the organization? | | If so, it may be desirable to use compatible format and content in developing new competency models. |
| **B9.** Do the performance appraisal forms for the jobs for which models are desired assess any personal qualities or competencies? | | If so, it may be desirable to change these forms once competency models are created, to ensure alignment with the new model(s). |
| **B10.** What is the organization's history, regarding competency models? | | If any previous experiences were less than satisfactory, it will be important to show how the current plan will avoid problems of the past. |
| **B11.** Do key stakeholders value quality and thoroughness? | | If yes, it will be important to gather data from multiple sources, including interviews with job incumbents, and to establish the model's validity. |

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| **B12.** How much tolerance for complexity is there among the organization's leaders and the key stakeholders for this project? | | If tolerance for complexity is moderate to high, it may be possible to plan for (a) many different competency models, (b) models with larger numbers of competencies, and (c) models with uniquely defined levels for each competency. |
| **B13.** Does the organization use any HRIS or other computer programs that support people management | | If so, the competency models should be planned to have a format that the HRIS system can support |

## C. Selecting the Approach to Model Building

*In the table below, read the item in the left column of a row. If the condition is true, write an X in each box to the right of the item. Otherwise, leave boxes blank. Repeat for each row.*

| | Single Job Approach | One Size Fits All Approach | Multiple Job Approach |
|---|---|---|---|
| Model is needed for one or two mission-critical jobs. | ☐ | | |
| A high degree of rigor is needed, to produce a model with high legal defensibility | ☐ | | |
| Model is needed to help develop cases and other training materials | ☐ | | |
| Model(s) will be used to guide selection | ☐ | | ☐ |
| Models or applications must serve many jobs | | ☐ | ☐ |
| Model(s) must help drive organizational change or support a new culture across the organization | | ☐ | |
| Models are needed for many jobs, and simple solutions are preferred. | | ☐ | |
| HR needs to implement programs quickly that will have broad impact across the organization. | | ☐ | |

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| It is important to build and reinforce a common language about competencies | | ☐ | |
| The model should support careful matching of people to jobs | ☐ | | ☐ |
| It is important for models to include technical skills and knowledge. | ☐ | | ☐ |
| There is low tolerance for complexity among HR and line staff who will use the models. | ☐ | ☐ | |
| There is tolerance for moderate complexity among HR and line staff who will use the models. | | | ☐ |
| Models are needed for multiple jobs, and the jobs are very different from each other. | | | ☐ |
| It is important to be able to use the models to compare the requirements of different jobs. | | | ☐ |
| Managers of persons in the job(s) will use the model(s) to aid in coaching. | ☐ | | ☐ |

*Review pages 4 and 5. Consider which column had the most X's and which X's are most important.*

## C. Selecting an Approach to Model Building (conclusion)

| Key Questions | Your Answers |
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| **C1.** Based on the analysis of the previous two pages, which of the three approaches to model building best meets your needs? | |
| **C2.** What are the most important reason(s) for selecting this approach? | |
| **C3.** What challenges do you anticipate in trying to implement this approach? | |

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| **C4.** What questions do you have about this approach? | |

## D. Building Support for the Project

| Key Questions | Your Answers | Considerations |
|---|---|---|
| **D1.** How will the model(s) and its applications improve business results? | | You may need to build a business case for the competency modeling project. |
| **D2.** Is there a senior leader who will sponsor the project? | | A senior sponsor is often needed to ensure that the project gets funded and to ensure participation by key stakeholders. |
| **D3.** Are there other HR staff or line managers who might help champion the project? | | You may be able to develop a coalition to help gain support for the project. |

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| **D4.** What needs and concerns of job incumbents might the project address? | | |
| **D5.** What needs and concerns of managers of job incumbents might the project address? | | |
| **D6.** What needs and concerns of upper management might the project address? | | |
| **D7.** Who might oppose the project, and why? | | Can you address their concerns? |

# E. Deciding on Data Sources

| Key Questions | Your Answers | Considerations |
|---|---|---|
| **E1.** Will the competency model be for one target job or job category? (e.g., sales representative, project manager, executive leader?) | | If so, it desirable to conduct interviews with some superior performing job incumbents. |
| **E2.** Is it important to develop a detailed understanding of how superior performers get superior results? | | If so, interviews will be needed. Interviews can provide detailed examples of behavior that are useful in developing training applications. |
| **E3.** Is there a very limited budget for the project? | | If so, conducting, transcribing and analyzing interviews may be too expensive, and the data will likely come primarily from resource panels. |
| **E4.** Does the project sponsor know any external industry experts who might be interviewed? | | This can be important if the industry is changing rapidly, or if the competency model is for a job that is new to the company. |

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| **E5.** Will managers of job incumbents make themselves available to attend a 4 to 6-hour resource panel to help identify job requirements? | | If not, an alternative is to try to get their input through separate interviews. |
| **E6.** Are job incumbents and their managers widely distributed geographically? | | If so, can they be pulled together for a resource panel? |
| **E7.** Are models needed for a set of jobs within one function (e.g., marketing)? | | If so, it will be important to (a) hold interviews with several people from the function to identify the required technical skills, and then (b) hold a 4-6 hour meeting with a group of leaders from that function, to identify the technical and non-technical competencies and their required levels, for each job. |
| **E8.** Can key job behaviors be easily observed (e.g., by listening to customer service calls)? | | If so, it may be desirable to include some observation of superior performers. |

| Key Questions | Your Answers |
|---|---|
| **E9.** What data collection methods will you use in your project? Resource Panels? Key Event Interviews? Other? | |
| **E10.** If you plan resource panels, how would you select the participants? | |
| **E11.** If you plan interviews, how would you select superior performers to be interviewed? | |

## F. Staffing the Model Building Project

| Key Questions | Your Answers | Considerations |
|---|---|---|
| **F1.** Which statement best describes how internal staff should be involved in the project?<br><br>a) They should support external consultants as needed.<br><br>b) They should learn some model building skills as part of the project<br><br>c) They should fully partner with consultants in planning the project, learning the skills, and collecting and analyzing the data | | Development can be valuable for internal staff. Only in large projects, with many interviews to be conducted and analyzed, are there cost savings in training staff in interviewing.<br><br>The quality of interviewing and analysis will be higher in external consultants who have honed these skills. If selection will be an application, training in Key Event Interview will be useful for internal staff. |
| **F2.** What internal staff might have interest and availability to participate in the project? | | |
| **F3.** Are any of these internal staff good group facilitators? | | Needed in facilitating focus groups. |

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| **F4.** Are any of these internal staff quick learners? | | Needed in conducting and analyzing interviews. |
| **F5.** Are any of these internal staff assertive persons with good interpersonal skills? | | Needed in conducting interviews |
| **F6.** Do any of these internal staff have strong communication skills? | | Needed in presenting and explaining the model |

## G. Envisioning the Data Analysis and Model Building

| Key Questions | Your Answers | Considerations |
|---|---|---|
| **G1.** What types of data will need to be integrated? | | If Key Event Interviews are included, you will need to plan for transcription, individual analysis of transcripts, and a meeting to review the interview evidence. |
| **G2.** Who will participate in the analysis and model building? | | Consider internal staff who conducted interviews or resource panels, consultants with generic competency dictionaries and experience building models, someone with strong writing skills. If interview transcripts will be read, remember to respect promises of confidentiality. |
| **G3.** What form of behavioral descriptors will be needed? (e.g.,behavioral indicators; levels with behavioral descriptions for each competency?) | | |

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| **G4.** What will be the key steps in the model building process? | | |
| **G5.** How many competencies should there be in each model? | | Models with 15 or more competencies can be unwieldy to present and to work with. Models with fewer than 10 competencies often omit critical skills and characteristics needed for superior performance. |
| **G6.** What questions/concerns do you have about the model building process? | | |

# H. Reviewing and Revising the Model

| Key Questions | Your Answers | Considerations |
|---|---|---|
| **H1.** Who should review the model and in what sequence? | | Consider first sending a draft of the model to trusted HR colleagues, a couple of managers of job incumbents. Consider sending the model to resource panel members. |
| **H2.** Who will make the final decision about revisions to the model, if there are disagreements? | | |

**CONTACT US**

**Office**

2020 NE 53rd Street

Ft. Lauderdale, FL 33308

**Phone & Fax**

Phone: 800. 870. 9490

Fax: 954. 938. 5025

Email: info@workitect.com

**Website & Social Media**

Twitter: @Workitect        LinkedIn: workitect-inc.

Facebook: @workitectinc    Website: www.workitect.com