

CGMA COMPETENCY FRAMEWORK PEOPLE SKILLS

PEOPLE SKILLS

FOUNDATIONAL: This requires a basic understanding of the business structures, operations and financial performance, and includes responsibility for implementing and achieving results through own actions rather than through others.

INTERMEDIATE: This requires a moderate understanding of overall business operations and measurements, including responsibility for monitoring the implementation of strategy. This has limited or informal responsibility for colleagues and/or needs to consider broader approaches or consequences.

ADVANCED: This requires strong understanding of the organisation’s environment, current strategic position and direction with strong analytical skills and the ability to advise on strategic options for the business. This includes formal responsibility for colleagues and their actions; and that their decisions have a wider impact.

EXPERT: This requires expert knowledge to develop strategic vision and provide unique insight to the overall direction and success of the organisation. This has formal responsibility for business areas and his/her actions and decisions have a high-level strategic impact.

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INFLUENCE

This is the ability to have an effect on people, relationships, processes and products while driving business performance in both domestic/international dealings.

FOUNDATIONAL

- Adapt your personal style to suit different people and situations
- Listen to and be sensitive to the views and values of others
- Understand and relate to others from different cultural background, including peers and customers in an open, friendly and professional way

INTERMEDIATE

- Sell own ideas and agenda by linking them to the needs and goals of others
- Anticipate responses of others when choosing the approach to take
- Remain professional in difficult situations; demonstrate empathy to understand the feelings and actions of others; and give difficult messages in a way that limits misunderstanding and promotes acceptance

ADVANCED

- Use a combination of logic, personal passion, conviction and interpersonal skills to influence others
- Relate to, develop and make use of a wide network of key relationships from both inside and outside the organisation to influence others
- Lobby to build behind the scene support for ideas and plans and solicit the involvement of others to build ownership and buy-in

EXPERT

- Influence and work effectively with organisations from different cultures
- Negotiate effectively at senior levels through anticipating and managing objections and challenges
- Communicate effectively and assertively in high risk situations to resolve complex and/or sensitive issues and build consensus

NEGOTIATION AND DECISION-MAKING

This is the ability to use proper influence skills to obtain positive outcomes and make decisions that align with the strategic direction of the organisation.

FOUNDATIONAL

- Recognise the different negotiating styles of parties to a negotiation and adapt style accordingly
- Support negotiations by providing information and being part of the team
- Understand who the key stakeholders are in a given situation and be able to communicate individual requirements
- Make decisions based on facts, common sense, previous experience; weigh up the pros and cons; and be able to explain the reasoning behind decisions
- Establish working level relationships with third-party counterparts to resolve routine issues

INTERMEDIATE

- Understand stakeholder's positions and bargaining power and be able to negotiate and/or participate in negotiations with some support
- Manage buy-in and gain trust with internal stakeholders prior to and during negotiations
- Manage internal expectations and keep all parties informed of developments; ensure best negotiation practice in terms of preparation, approach, strategy, tactics and style
- Research and use data from a range of sources to make robust fact-based decisions; make available choices clear and simple to stakeholders
- Review the immediate results, broad implications and unintended consequences of a decision

ADVANCED

- Negotiate in tough situations with both external and internal stakeholders; demonstrate confidence, good political savvy and maintain credibility with third-party key decision-makers
- Adjust personal positions and style quickly if circumstances change favourably and unfavourably; win concessions without damaging stakeholder relationship
- Manage the negotiation team effectively; ensure each member is fully prepared for the negotiation; consistently secure positive outcome from the negotiation
- Assess and lead fact-based decisions in high-risk situations; coach others accordingly; and take accountability for final decision outcomes

EXPERT

- Demonstrate use of a direct and diplomatic style; challenge information to detect discrepancies in reasoning
- Show an excellent sense of timing, quickly gain trust and respect of all other parties to the negotiations
- Lead the most complex negotiations and demonstrate expert closing skills and excellent political and cultural savvy
- Lead fact-based decision-making for long-term strategic issues; analyse the wider business and political implications when making decisions, including the effectiveness of outcome
- Share strategic insights and knowledge to help others make sound decisions

COMMUNICATION

This is the ability to translate and convey financial and non-financial information effectively to all levels both within and outside of the organisation.

FOUNDATIONAL

- Listen actively to others, acknowledge hearing different perspectives and react appropriately to non-verbal cues
- Develop and deliver verbal information in a clear and concise manner that is tailored to the needs of the audience
- Develop written material that is clear, concise, accurate and grammatically correct; use appropriate language and tone and tailor the information to the needs of the audience
- Provide fact-based information to others based on requests; use communication tools appropriately and in a timely manner

INTERMEDIATE

- Understand the big picture by listening and leveraging non-verbal cues
- Engage audience in interactive communication in small and large group settings and anticipate needs/questions and respond appropriately
- Develop written material that is easily understood to influence business partners and management; effectively respond to impromptu questions and simplify complex information to ensure understanding
- Identify the appropriate audience for sharing information and proactively share appropriate fact-based information in a balanced and timely manner

ADVANCED

- Effectively listen and pick up the total meaning of the message as well as information that others will typically miss
- Deliver presentation to senior management with confidence and acknowledge when the answer is unknown to a business question
- Share important and useful fact-based information; simplify complex written communications and adapt style and content for all levels of the organisation
- Encourage the sharing of ideas and best practices to ensure understanding and achieve best possible outcome; encourage others to speak their minds and listen empathetically to understand the real motivators and emotions

EXPERT

- Lead organisation forums to obtain wide perspective of ideas
- Create forums, systems and procedures to actively source, hear and share diverse perspectives to enhance understanding
- Confidently present controversial and/or complex information to all levels of the organisation
- Lead the development of written information for highly visible or complex situations

COLLABORATION AND PARTNERING

This is the ability to establish relationships and cross-functional partnerships through demonstrated integrity to create value for the business.

FOUNDATIONAL

- Establish relationships and credibility with business partners
- Analyse needs of business partners
- Acknowledge different priorities between finance and the business partners

INTERMEDIATE

- Maintain and enhance effective cross-functional business partnerships through demonstrated integrity
- Influence outcomes and challenge appropriately using fact-based data
- Identify and address additional business partner needs and educate them on value creation and accounting

ADVANCED

- Lead cross-functional business initiatives and encourage team to cultivate relationships across the business
- Drive collaborative culture and joint accountabilities across multiple stakeholders
- Actively educate and challenge on limitations of possible solutions

EXPERT

- Drive cross-functional initiatives across the business that create value
- Leverage a broader network across the business and externally