

# Quick-Start Competency-Modeling

## Using Expert Panels (Focus Groups) and Job Analysis Interviews



Many small and medium-size organizations want to develop competency models and integrate competencies into their talent management and HR systems. Unfortunately, many are constrained by limited budgets to use consultants or purchase competency dictionaries, software, interview guides, etc. In response to this problem, Workitect developed and

began conducting a three-day workshop in 2004 to train internal HR professionals to build their own competency models. More than 1,200 people have attended these workshops and have built models using our methodology.

### **The McClelland/McBer Model-Building Methodology**

Our methodology for building job competency models is based on the Job Competence Assessment (JCA) methodology developed by Dr. David McClelland, a pioneer in motivation and competency research and testing at Harvard, and by consultants at McBer and Company in the 1970's.

The modeling process starts with superior performers in a targeted job being identified, and then studied to identify the personal characteristics, skills, and knowledge that they possess that enables them to be superior performers. The methods used to collect data for building the model, such as behavioral event interviews and expert panels, are designed to get beneath mere opinions about superior performance and superior performers.

Thirty years ago, we conducted research on job competence assessment and created a generic competency dictionary that has been tested and has evolved into a practical, comprehensive, and affordable dictionary consisting of 35 foundational competencies (leadership, management, and professional). Many organizations are now using this dictionary to build models and applications. Still, many organizations are finding it difficult to launch a competency-modeling project, often due to a lack of time, staff, or budget. To help these organizations, we have taken material from our Building Competency Models workshop and developed a program to enable a competency dictionary licensee to build basic competency models using focus groups, supplemented with optional job task analysis interviews.



The three-part program consists of these instructional materials:

### **1. Overview of Competencies and Competency Models (16 page PDF)**

- What is a Competency?
- What is a Competency Model?
  - Example of a Competency Model
- Why Develop Competency Models

Integrating Key HR Processes (10 page PDF)

Competencies 101 (Powerpoint)

The Case for a Competency-Based HR System (Powerpoint)

### **2. Planning a Competency Modeling Project (8 page PDF)**

- Analyzing and Identifying Stakeholders
  - Stakeholder Analysis Table
- Structure of the Plan
- Communicating with Stakeholders and Employees

Worksheet for Planning a Competency Modeling Project (13 page PDF)

- Scope of the Project
- Organizational Context
- Selecting the Approach to Model Building
- Building Support for the Project
- Deciding on Data Sources
- Staffing the Model Building Project
- Envisioning the Data Analysis and Model Building
- Reviewing and Revising the Mode

### **3. Collecting Data & Developing a Basic\* Competency Model (14 page PDF)**

Using Focus Groups and Job Analysis Interviews

- General Data Collection Tasks
- Primary Data Collection Methods
  - Job Analysis Interviews
  - Resource Panels, aka Focus Groups or Expert Panels
- Instructional manual on facilitating a Resource Panel
- Alternative Methods
- Virtual Resource Panel & Job Competency Profile
- Competency Model Survey

Resource Materials (separate documents and forms)

- Competency Requirements Questionnaire
- Competency Requirements Questionnaire Tabulation worksheet
- Job Analysis Interview for Jobholders Template
- Job Analysis Interview for Managers of Jobholders Template
- Competency Dictionary

\*A full model includes the conducting, analyzing, and coding of structured behavioral event interviews.

## WorkitECT Competency Dictionary

COMPETENCIES DEALING WITH P E O P L E	COMPETENCIES DEALING WITH B U S I N E S S	COMPETENCIES DEALING WITH S E L F M A N A G E M E N T
LEADING OTHERS	PREVENTING AND SOLVING PROBLEMS	31 Self Confidence
1 Establishing Focus	16 Diagnostic Information Gathering	32 Adaptability
2 Providing Motivational Support	17 Analytical Thinking	33 Personal Credibility
3 Fostering Teamwork	18 Forward Thinking	34 Flexibility
4 Empowering Others	19 Conceptual Thinking	35 Personal Accountability
5 Managing Change	20 Strategic Thinking	
6 Developing Others	21 Technical Expertise	
7 Managing Performance	ACHIEVING RESULTS	
8 Fostering Diversity	22 Initiative	
COMMUNICATING AND INFLUENCING	23 Entrepreneurial Orientation	
9 Attention To Communication	24 Fostering Innovation	
10 Oral Communication	25 Customer Orientation	
11 Written Communication	26 Results Orientation	
12 Persuasive Communication	27 Thoroughness	
13 Interpersonal Effectiveness	28 Decisiveness	
14 Influencing Others	29 Business Acumen	
15 Building Collaborative Relationships	30 Global Perspective	

- Licensees are expected to attend a future public or onsite workshop to learn how to collect and analyze additional data, including structured behavioral event interviews, and to develop competency-based applications.
- Participants will be given access to all materials in Dropbox folders.
- Word versions of some customizable documents and forms are available.
- Phone or live online coaching from a WorkitECT consultant is available.

**THIS PROGRAM IS AVAILABLE FOR LICENSEES OF WORKITECT'S COMPETENCY DICTIONARY.**

Contact Ed Cripe at WorkitECT for additional information about this program.  
Email: [ec@workitECT.com](mailto:ec@workitECT.com) or call 800-870-9490.