NOTE: THIS IS AN EXAMPLE OF COMPETENCIES WITHIN THE PROFESSIONAL PLANNING FORUM’S SKILLS FRAMEWORK

Written by Colin Whelan
Signed off by Steve Woosey

Version Example (March 2013)
Performance Analysis ................................................................. 11

Academic Discipline: Statistical and Forecasting Techniques (2.4.1) ................................................................. 11
Academic Discipline: Simulation modelling (2.4.2) ................................................................. Error! Bookmark not defined.
Academic Discipline: Optimisation techniques (2.4.3) ................................................................. Error! Bookmark not defined.
Academic Discipline: Systems thinking and decision theory (2.4.4) ................................................................. Error! Bookmark not defined.

Operational Experience ................................................................................................................................. 12

Contact activity: Inbound operations (3.1.1) ................................................................................................. 12
Contact activity: Email and web contacts (3.1.2) ............................................................................................... Error! Bookmark not defined.
Contact activity: Outbound contact (3.1.3) ................................................................................................. Error! Bookmark not defined.
Contact activity: Back office processing operations (3.1.4) ........................................................................ Error! Bookmark not defined.
Operation and role: Virtual or multi-site resource management (3.2.1) ............................................................ Error! Bookmark not defined.
Operation and role: Integrating customer communications (3.2.2) ................................................................. Error! Bookmark not defined.

Communication .................................................................................................................................................. 13

Communication Skills: Verbal communication (6.1.1) .......................................................................................... 13
Communication Skills: Written communication (6.1.2) ....................................................................................... Error! Bookmark not defined.
Communication Skills: Listening skills (6.1.3) ................................................................................................. Error! Bookmark not defined.
Communication Skills: Multi-lingual skills (if required) (6.1.4) ........................................................................ Error! Bookmark not defined.
Buy-in and Influence: Relationship Building (6.2.1) ......................................................................................... Error! Bookmark not defined.
Buy-in and Influence: Facilitation Skills (6.2.2) ................................................................................................. Error! Bookmark not defined.
Buy-in and Influence: Presentation Skills (6.2.3) ................................................................................................. Error! Bookmark not defined.
Buy-in and Influence: Negotiation and Influence (6.2.4) ................................................................................... Error! Bookmark not defined.
Focus and Awareness: Colleague engagement (6.3.1) ....................................................................................... Error! Bookmark not defined.
Focus and Awareness: Customer focus (6.3.2) ................................................................................................. Error! Bookmark not defined.
Focus and Awareness: Business awareness (6.3.3) ......................................................................................... Error! Bookmark not defined.
Focus and Awareness: Mutual understanding (6.3.4)................................................................................................................................. Error! Bookmark not defined.
Management .................................................................................................................. 14
Team Performance: Delivers agreed objectives (7.1.1)................................................................................................................................. 14
Team Performance: Coaching and Mentoring (7.1.2)................................................................................................................................. Error! Bookmark not defined.
Team Performance: Quality standards (7.1.3)........................................................................................................................................... Error! Bookmark not defined.
Team Performance: Team Development (7.1.4).......................................................................................................................................... Error! Bookmark not defined.
Leadership: Judgement & decision making (7.2.1)....................................................................................................................................... Error! Bookmark not defined.
Leadership: Innovates and improves (7.2.2)............................................................................................................................................. Error! Bookmark not defined.
Leadership: Inspires and motivates (7.2.3)............................................................................................................................................... Error! Bookmark not defined.
Leadership: Respects and promotes diversity (7.2.4)............................................................................................................................... Error! Bookmark not defined.
Leadership: Manages stress positively (7.2.5)........................................................................................................................................... Error! Bookmark not defined.
Business skills: Project management (7.3.1).............................................................................................................................................. Error! Bookmark not defined.
Business skills: Process improvement (7.3.2)............................................................................................................................................ Error! Bookmark not defined.
Business skills: Change communication (7.3.3)...................................................................................................................................... Error! Bookmark not defined.
Business skills: Legal and contractual compliance (7.3.4)....................................................................................................................... Error! Bookmark not defined.
Professional .................................................................................................................. 15
Personal Organisation: Time Management (8.1.1)................................................................................................................................. 15
Personal Organisation: Attention to detail (8.1.2)...................................................................................................................................... Error! Bookmark not defined.
Personal Organisation: Teamwork (8.1.3)............................................................................................................................................... Error! Bookmark not defined.
Personal Organisation: Continuous learning (8.1.4)............................................................................................................................... Error! Bookmark not defined.
Personal Aptitudes: Integrity (8.3.1)...................................................................................................................................................... Error! Bookmark not defined.
Personal Aptitudes: Initiative (8.3.2).................................................................................................................................................. Error! Bookmark not defined.
Personal Aptitudes: Self-motivation (8.3.3).......................................................................................................................................... Error! Bookmark not defined.
Personal Aptitudes: Credibility (8.3.4)................................................................................................................................................ Error! Bookmark not defined.
Personal Aptitudes: Confidence (8.3.5)

Personal Aptitudes: Positive attitude (8.3.6)

Planning Management Information

Management Information: Business Communication & Reporting (9.1.1)

Management Information: Analysis (9.1.2)

Management Information: Input Accuracy (9.1.3)

Management Information: Problem Solving (9.1.4)

Management Information: Numeracy (9.1.5)
Introduction
The Skills Framework is a software based tool used for development and performance management purposes developed by the Professional Planning Forum.

This tool, which is Free to corporate members of the Professional Planning Forum, will form the “back bone” to the operational assessment of ongoing development of all students, Professional Members and Corporate Members.

Background
There is a UK company called E-skills (formally Skills for success) who provide detailed competency frameworks for all roles within a company.

The Professional Planning Forum has specialised this methodology to provide its own generic Skills Framework for;

- Resource & Planning Managers
- Forecasters
- Schedulers
- Real Time analysts
- Management Information analysts.

Benefits
A lot of people are familiar with competency based interviews; the Skills Framework brings this discipline into day to day management of Resource Planners, providing a fantastic tool to identify development requirements, for individuals’ current and future roles.
Skills Assessment

Using the Skills Framework is very simple and conducive to inclusive development, as the processes include a number of calibration meetings with each student’s leader.

The Professional Planning Forum have identified over 65 individual skills which cover the full range required to function effectively in all levels of a planning and Management Information role from an analyst to a manager.

Each job role on the portal has skills scored from 1-4. The score for each skill is reflective of the level of competency required for the role in question. For example one skill might be scored at 4 for the Planning Manager, but this skill is not essential for a Real Time Analyst and is therefore scored at level 1.

Each of the roles in the planning environment has unique scores which have been attested by a number of experienced planners across the UK.

Development

The portal is designed for the individual to assess themselves and score each of the skills identified for their role. Then, separately, the individual’s manager scores the person for the same skills. A subsequent “calibration” meeting provides a fantastic framework for individuals and managers to understand each other’s perceptions of the individual’s capabilities.

Once an individual’s scores have been agreed, through the calibration meeting, the individual’s scores are then compared to the generic scores on the portal, to identify areas of strength and areas for development in a clear and inclusive manner.

Professional Development programme

It is anticipated that there will be 3 key points of assessments through each of modules of the program:

1. At the very start of the program to identify the students current skill set, a benchmark to compare all future development against (Including a calibration meeting with the students leader)
2. After the first Module
3. At the end of the years development programme (including a calibration meeting with the students manager) to identify the initial skills development achieved with the support of the programme

Corporate members of the Planning Forum have access to the skills framework at ANY time should they so wish.
**Career Development**

Another key feature of using the Skills Framework is the ability to share with individuals the skills required for others roles within planning; helping an individual to focus their development on the next role in their career path.

The skills framework also provides support in identifying potential by providing a benchmark for requirements during recruitment.

**Professional Accreditation**

The skills framework will provide the main interface with those who have applied for Professional Accreditation (individual membership) with the Professional Planning Forum, and will help in the assessment of any levels applied for during this process. Linked to any Planning Forum led development, if an individual attends any Planning Forum course, then their relative scores for their Professional Accreditation, will be updated with the score of those that cross over into the assessment process for the programme they have entered.

**Business Accreditation (2014)**

With the development of the Professional planning Forum’s Business Accreditation programme, the processes which are anticipated, benchmarked and assessed will form part of a third framework (after skills framework and professional development). This will ensure a consistent repository for all the best practice skills, processes and procedure for the entire industry are stored, updated and managed in one solution for all to use.
Appendix: Skills

The following pages show, in detail, the different skills / competencies and the attributes around each level.
**Resource Planning**

**Operational Planning: Operational focus and awareness (1.1.1)**
The ability to understand the impact on operational performance of individual and group actions, as well as external factors, and use this in influencing the behaviour of colleagues at all levels.

<table>
<thead>
<tr>
<th>Level</th>
<th>Activities &amp; Behaviours</th>
<th>Knowledge and Understanding</th>
<th>Evidence</th>
</tr>
</thead>
<tbody>
<tr>
<td>Level 1: Displays operational focus in management of own time</td>
<td><strong>“Recognises individual responsibilities, performs basic tasks”</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Arrives for work promptly as scheduled, with a good attendance record.</td>
<td>• Understands the impact one person makes and of transaction times.</td>
<td>• Good ‘adherence’</td>
</tr>
<tr>
<td></td>
<td>• Manages own time to schedule (eg adherence)</td>
<td>• Understands how ‘absence makes your friends work harder’.</td>
<td>• Good attendance</td>
</tr>
<tr>
<td></td>
<td>• Uses systems appropriately to record use of time &amp; completion of work.</td>
<td>• Understands the business needs for working patterns and changes.</td>
<td>• Good attendance</td>
</tr>
<tr>
<td>Level 2: Displays operational focus in managing/influencing colleagues</td>
<td><strong>“Performs a variety of activities with minimal supervision, contributes ideas and knowledge.”</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Talks with individual agents to help them understand</td>
<td>• Understands how to communicate this to agents - i.e. the Wifm levers.</td>
<td>• Team attendance</td>
</tr>
<tr>
<td></td>
<td>• Uses information provided by others to include these topics in team meetings</td>
<td>• Knows where to get info and support and how to get it</td>
<td>• Team ‘adherence’</td>
</tr>
<tr>
<td></td>
<td>• Reflects operational needs in routine performance management</td>
<td>• Understands the economics of scale and the dynamics of abandoned calls</td>
<td>• Responsiveness to requests from planning.</td>
</tr>
<tr>
<td></td>
<td>• Reflects this in management of team activities and offline time</td>
<td>• Aware of erlang and/or other calculations used to plan staffing.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Plans own activities around peaks and troughs</td>
<td>• Understands the peaks and troughs in own operation.</td>
<td></td>
</tr>
<tr>
<td>Level 3: Undertakes initiatives to improve operational focus and awareness</td>
<td><strong>“Handles complex tasks, evaluates performance, provides recommendations for improvements.”</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Explains the key drivers of service performance and productivity.</td>
<td>• Relates general dynamics to own operation - creating rules of thumb.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Offers presentations in induction and other training/team building sessions.</td>
<td>• Aware of differences between types of industry and centre.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Organises ‘power of one’ educational sessions for colleagues at all levels</td>
<td>• Understands how to make the information relevant to colleagues.</td>
<td></td>
</tr>
<tr>
<td>Level 4: Promotes and develops operational focus within the organisation</td>
<td><strong>“Sets direction, optimises performance, acts as a role model.”</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Creates an environment of mutual understanding in the operation.</td>
<td>• How own behaviour and priorities can enable them to act as a role model</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Develops a strategic plan to develop &amp; sustain focus &amp; awareness.</td>
<td>• Organisational/Business strategy</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Uses communication opportunities to promote understanding &amp; focus.</td>
<td>• Trends in other organisations and industries.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Offers feedback/coaching where appropriate - to own team &amp; others.</td>
<td>• Where feedback and coaching can be appropriate and helpful</td>
<td></td>
</tr>
</tbody>
</table>
## Performance Analysis

**Academic Discipline: Statistical and Forecasting Techniques (2.4.1)**

Understands and applies the use of statistical and forecasting techniques, with a discipline that is appropriate to own level of academic and practical experience.

<table>
<thead>
<tr>
<th>Level</th>
<th>Activities &amp; Behaviours</th>
<th>Knowledge and Understanding</th>
<th>Evidence</th>
</tr>
</thead>
</table>
| **Level 1:**
Understands the importance of these techniques in own role
“Recognises individual responsibilities, performs basic tasks” | • Able relate some basic concepts to work in own role or organisation  
• Takes steps to develop understanding of basic concepts where required.  
• Can undertake processes using basic concepts where taught how to do so. | • Averages & weighted averages  
• Frequency graphs and analysis methods  
• Basic concepts of probability | • |
| **Level 2:**
Develops expertise and applies this in own role
“Performs a variety of activities with minimal supervision, contributes ideas and knowledge.” | • Able to explain basic concepts to others and to demonstrate how these techniques are used in own role.  
• Able to extend own knowledge in this specialist area by reading and studying under guidance  
• Can undertake processes using a range of techniques, where supported to do so. | • A range of statistical techniques - developed beyond the immediate needs of the current workload  
• Simple historical and causal forecasting methods  
• Correlation methods | • |
| **Level 3:**
Uses own expertise to develop how these techniques are used in the organisation
“Handles complex tasks, evaluates performance, provides recommendations for improvements.” | • Able to undertake research so as to understand and communicate concepts used in own organisation.  
• Takes steps to extend own knowledge in this specialist area and to guide others  
• Takes steps to keep abreast of developments in this area - internally and externally  
• Can represent other specialists and support them in their application of these techniques | • Statistical techniques to diploma level  
• Forecasting techniques to diploma  
• A number of application areas outside of own immediate role or organisation | |
| **Level 4:**
Recognised as specialist expert and promotes the best use of these techniques
“Sets direction, optimises performance, acts as a role model.” | • Able to generate understanding and enthusiasm for this specialist area  
• Able to work creatively in developing new methods or applications in own organisation or beyond.  
• Promotes the appropriate use of these techniques  
• Keeps abreast of how these techniques are being used internally and externally | • Statistical techniques to undergraduate level or beyond  
• Forecasting techniques to undergraduate level or beyond  
• New ideas and methods being explored in both practical and academic circles  
• Key areas of application for different techniques | |
### Operational Experience

**Contact activity: Inbound operations (3.1.1)**

Has the experience and ability to understand the factors that drive performance in an inbound call centre and use these in own role to support successful planning and performance in own operation(s).

<table>
<thead>
<tr>
<th>Level</th>
<th>Activities &amp; Behaviours</th>
<th>Knowledge and Understanding</th>
<th>Evidence</th>
</tr>
</thead>
</table>
| Level 1: Understands responsibilities of self/team for delivering as planned/scheduled | • Uses knowledge in managing own or team behaviour.  
• Able to take part in focus or working groups (as appropriate).  
• Applies knowledge is assessing or communicating business changes. | • Dynamics of service levels (calls bunch up, no catch up, need availability).  
• "Power of One" - sensitivity to small changes in staffing levels etc.  
• The impact of changes to handling time on service and costs.  
• The impact of 'shrinkages' such as sickness or not-ready time. |  |
| “Recognises individual responsibilities, performs basic tasks” | | |  |
| Level 2: Applies understanding to make sound judgements and manage use of resources | • Uses knowledge in resource planning or management.  
• Able to take part in project groups (as appropriate).  
• Uses knowledge in explaining things to others. | • How Erlang B & C and similar calculations can be used for planning.  
• The concepts of utilisation, economies of scale etc  
• The dynamics of queuing behaviour, caller tolerance and abandoned calls.  
• Daily and interval workload patterns in own operation(s).  
• The impact of cycles, seasonality, campaigns etc in own operation.  
• Top ways in which these impact people. |  |
| “Performs a variety of activities with minimal supervision, contributes ideas and knowledge.” | | |  |
| Level 3: Assess, analyse and improve the way the operation plans for inbound call handling | • Uses knowledge to understand and interpret data.  
• Uses knowledge to build, evaluate and improve planning and operating models.  
• Uses knowledge to evaluate and recommend KPIs.  
• Uses knowledge to create, evaluate and improve planning and operational processes.  
• Explains the role of inbound call handling within the business and motivates appropriate operational behaviour | • Methods that work for motivating agent attendance, adherence and performance  
• Methods that have worked for work-life balance in inbound operations.  
• Daily and interval workload patterns in a range of operation(s).  
• The impact of cycles, seasonality, campaigns etc in a range of operations.  
• Operational planning or management experience in a range of operations.  
• The role of inbound call handling within the business |  |
| “Handles complex tasks, evaluates performance, provides recommendations for improvements.” | | |  |
| Level 4: Promotes policies and working practices that enable outstanding performance | • Develop a strategic framework for planning for inbound contact centres.  
• Promotes appropriate working methods & policies.  
• Uses knowledge to creates an environment of mutual understanding.  
• Uses knowledge to offers coaching/mentoring where appropriate. | • Organisational/business strategy  
• Trends in other industries and organisations.  
• New technologies and methods that could enable improvements |  |
| “Sets direction, optimises performance, acts as a role model.” | | |  |
# Communication

**Communication Skills: Verbal communication (6.1.1)**

Verbal communication - face to face or over the phone - using appropriate language, style and content.

<table>
<thead>
<tr>
<th>Level</th>
<th>Activities &amp; Behaviours</th>
<th>Knowledge and Understanding</th>
<th>Evidence</th>
</tr>
</thead>
</table>
| **Level 1:** Recognises importance of using appropriate language, style & content  
“Recognises individual responsibilities, performs basic tasks” | Modulates voice when speaking  
Recognises techniques for effective verbal communication  
Recognises organisational procedures and standards for verbal communication  
Recognises the importance of relevant information | Appropriate intonation and tone  
Basic audio techniques (e.g. smiling while talking on the phone)  
Difference between positive and negative language |  |
| **Level 2:** Adopts style and perspective of the person being talked with  
“Performs a variety of activities with minimal supervision, contributes ideas and knowledge.” | Articulates information and expresses ideas clearly and concisely  
Uses a range of appropriate questioning techniques  
Responds to questions with accurate, relevant and sufficient information  
Organises and presents own perspective in a structured and appropriate manner  
Ensures message content is relevant to the audience  
Maintains control of the verbal interaction  
Varies the tone, style and content appropriate to the audience | The importance of ‘body language’ and personal presentation.  
Different people have different communication styles  
The importance of matching the styles of the audience  
Difference between open, closed and probing questions |  |
| **Level 3:** Continually develops and improves their own verbal communication  
“Handles complex tasks, evaluates performance, provides recommendations for improvements.” | Communicates effectively with a variety of audiences on delicate/complex issues - at all levels, internally or externally  
Uses a range of verbal and non-verbal techniques to build and maintain rapport  
Maintains consistent communication style throughout contact  
Develops personal flexibility using different styles with different people  
Reviews communication interactions - reflecting personally & discussing with others.  
Communicates within a framework where the focus is on a desired outcome. | Importance of style, intonation, inflexion, technical terminology, vocabulary in adapting to audience needs  
Common types of communication, learning and thinking styles.  
Methods for adopting different communicating styles to match audience  
Techniques for building rapport, trust and confidence  
Benefits of adopting customer style (e.g. rapport) |  |
| **Level 4:** Acts as role model and develops verbal communication within the organisation  
“Sets direction, optimises performance, acts as a role model.” | Being seen to communicate effectively with groups and individuals, adapting to the style and perspective of the audience and using a wide range of techniques  
Being seen to develop and improve their own verbal communication  
Offers feedback/coaching where appropriate - to own team and other colleagues  
Being involved in evaluating and improving verbal | Methods used for evaluating and improving verbal communications in other organisations  
How own communication style can enable them to act as a role model  
Where feedback and coaching can be appropriate and helpful |  |
## Management

**Team Performance: Delivers agreed objectives (7.1.1)**

Delivers outstanding performance by agreeing appropriate objectives, prioritising effectively and using effective performance management processes.

<table>
<thead>
<tr>
<th>Level</th>
<th>Activities &amp; Behaviours</th>
<th>Knowledge and Understanding</th>
<th>Evidence</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Level 1:</strong> Manages own performance to deliver agreed results</td>
<td>• Seen to take responsibility for own performance</td>
<td>• Own objectives and the consequences of meeting them (or not)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Consistently delivers to agreed objectives</td>
<td>• Forms and processes used in setting objectives</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Reviews performance with peers and direct manager and takes actions to continuously improve</td>
<td>• Procedures and technologies required to deliver objectives</td>
<td></td>
</tr>
<tr>
<td><strong>Recognises individual responsibilities, performs basic tasks</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Level 2:</strong> Able to handle priorities between more than one task within clear boundaries - for self or others</td>
<td>• Able to distinguish urgent vs. important and apply this in prioritising work in own area.</td>
<td>Basic principles of objective setting (eg SMART etc)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Able to set appropriate and effective objectives, using appropriate methods and consultation</td>
<td>• Action planning and other methodologies for creating effective objectives</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Identifies from previous experience appropriate factors to build into future objective setting.</td>
<td>• Standards of performance outside of own role or area</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Seen as pulling weight within a team and as someone who reliably delivers.</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Performs a variety of activities with minimal supervision, contributes ideas and knowledge.</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Level 3:</strong> Able to handle priorities between more than one task, seeking guidance to clarify boundaries where required</td>
<td>• Delivers consistently even in busy periods and when handling multiple priorities at the same time</td>
<td>Business priorities as they affect self and others</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Sets boundaries to clarify priorities for self and others</td>
<td>• Impact of non-delivery of own and others objectives</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Engages in appropriate conversations with all affected parties to assess risks etc</td>
<td>• Understands own role and the impact of this on other areas.</td>
<td></td>
</tr>
<tr>
<td><strong>Handles complex tasks, evaluates performance, provides recommendations for improvements.</strong></td>
<td>• Applies overall strategic aims in defining immediate tasks</td>
<td>• Standards of performance elsewhere in own and other organisations</td>
<td></td>
</tr>
<tr>
<td><strong>Level 4:</strong> Creates an environment that supports outstanding performance by own team and others</td>
<td>• Establishes a plan for delivery of strategic objectives</td>
<td>Factors driving outstanding performance in own and other organisations</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Involves and motivates key stakeholders to support and facilitate this plan</td>
<td>Strategic goals</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Acts as a role model to others and inspires confidence in shared objectives</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Coaches and mentors others appropriately - both formally and informally</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Uses network to drive understanding of best practice from other organisations and individuals.</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Sets direction, optimises performance, acts as a role model.</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
**Professional**

**Personal Organisation: Time Management (8.1.1)**

The effective organisation of activities and commitments, so as to deliver agreed objectives, manage stress and support continuous improvement.

<table>
<thead>
<tr>
<th>Level</th>
<th>Activities &amp; Behaviours</th>
<th>Knowledge and Understanding</th>
<th>Evidence</th>
</tr>
</thead>
</table>
| **Level 1:** Personally punctual and able to deliver specified tasks within agreed timeframes  
“Recognises individual responsibilities, performs basic tasks” |  
- Punctually available for performance of duties  
- Follows schedule of activities appropriately to own job role  
- Identifies issues with time or potential conflicts and seeks assistance in resolving these  
- Tracks time spent on key elements of role compared to standards expected for the job role |  
- Job requirements and responsibilities  
- Deadlines and time allocated for regular tasks  
- The impact of poor time management and the benefits of good time management  
- Standards expected for job role |  

| Level 2: Organises own activity to deliver within agreed time limits and standards  
“Performs a variety of activities with minimal supervision, contributes ideas and knowledge.” |  
- Demonstrates appreciation of own responsibilities and areas of flexibility  
- Establishes methods for making decisions about how to approach tasks and objectives  
- Successfully completes tasks and assignments to a high standard  
- Sets up simple time planning or tracking mechanisms within own job role  
- Recognises the impact on task completion if time is not effectively managed |  
- Time limits and standards for own duties  
- Tasks and activities required to complete duties to required standards  
- Alternative ways of achieving key objectives  
- Simple methods for managing tasks and priorities  
- Common links between own management of time and personal stress or motivation |  

| Level 3: Works with others in balancing conflicting priorities  
“Handles complex tasks, evaluates performance, provides recommendations for improvements.” |  
- Sets and achieves explicit prioritisation and agreement on deadline and time commitments  
- Establishes comprehensive methods for managing own tasks to support work priorities  
- Maintains personal balance between own priorities as they impact motivation and performance  
- Seeks alternative ways to reach desired objectives effectively for critical or lengthy tasks |  
- The consequences on self and others of not managing time effectively  
- Methods for assessing the time consequences of alternative approaches and priorities  
- The relative impact on time of different factors within own job role  
- A range of methods for managing time and prioritisation |  

| Level 4: Creates an environment where people focus effectively on priorities  
“Sets direction, optimises performance, acts as a role model.” |  
- Recognises those who manage time and priorities effectively and supports them in improving this  
- Acts as a role model demonstrating consistent focus on priorities  
- Designs new procedures/processes to perform tasks more effectively  
- Explains and demonstrates the benefits of focusing effectively on priorities and managing time  
- Keeps up-to-date with developments via research, books, journals, seminars etc |  
- How own management of time and priorities can impact others  
- Where effective prioritisation can make most impact on overall performance  
- Methods used in other centres or sectors  
- Latest thinking in management theory |