

Competency Framework Template

What This Template Does for You

If you've ever struggled to explain exactly what makes someone successful in a role beyond "they're just good at it," this template is for you. It helps you create clear, specific descriptions of what good performance actually looks like - the kind that helps both managers and employees understand expectations.

Use this template when: you need to define role standards, create job descriptions, or establish performance criteria.

Do NOT use this template when: you need to understand how skills develop or align training to jobs.

Before You Start Ask 3 Essential Questions

Take 5 minutes to answer these:

1. **What role or position are you creating this framework for?**
2. **Who will use this framework?** (HR for hiring? Managers for reviews? Employees for development?)
3. **What's your biggest challenge with this role right now?** (Hard to hire for? Performance inconsistent? Unclear expectations?)

Keep these answers to guide your decisions throughout the process.

Step 1: Set Up Your Framework

Target Role/Function: _____

Time Estimate: 15 minutes

How Many Competencies Should You Include?

Consider these factors:

- **Role complexity:** More complex roles may need more competencies
- **Organizational maturity:** Start simple if this is your first framework
- **User capacity:** How much can managers and employees realistically focus on?

Rule of thumb: Focus on the competencies that most distinguish good performers from average ones, rather than trying to capture everything.

Step 2: Define Your Competencies

Time Estimate: 45-60 minutes

Pro Tip: Work through one category at a time. Don't try to fill everything out in one sitting. Once you're finished completing the table for each skill, do a quick check for comprehension.

Technical Competencies

Role-specific expertise that requires specialized training, certification, or domain knowledge. These are the 'hard skills' that someone couldn't perform the core job functions without.

Examples: Programming languages, financial modeling, clinical procedures, regulatory compliance, specific software proficiency.

Focus Question: "What technical skills would make someone fail in this role if they didn't have them?"

Competency Name	What This Actually Means	Proficiency Levels	What You'd See Someone Do
Example: Data Analysis	Ability to interpret and draw insights from quantitative information	Novice: Uses basic Excel functions Proficient: Creates useful reports Expert: Designs analytical models	Novice: Can run basic calculations, asks for help interpreting results Expert: Others come to them with data questions, spots trends others miss

Quick Check: Can someone who doesn't know this job understand what each competency means?

Professional Competencies

Transferable work behaviors and approaches that enable effectiveness across different roles and organizations. These determine how well someone executes their work and collaborates with others.

Examples: Communication, project management, problem solving, time management, adaptability, customer service

Focus Question: "What professional skills separate good performers from average ones in this role?"

Competency Name	What This Actually Means	Proficiency Levels	What You'd See Someone Do
Example: Project Management	Plans, executes, and monitors work to achieve specific outcomes	<p>Novice: Can follow a project plan</p> <p>Proficient: Creates and manages project plans</p> <p>Expert: Manages complex, multi-stakeholder projects</p>	<p>Novice: Completes assigned tasks on time, updates status regularly</p> <p>Expert: Anticipates problems, adjusts plans proactively, stakeholders trust their judgment</p>

Quick Check: Could these competencies help someone succeed in other roles or organizations too? If not, they might actually be technical competencies.

Leadership Competencies

Abilities to influence outcomes, guide others, and drive organizational success - regardless of formal authority. These determine someone's impact beyond their individual contributions.

Examples: Strategic thinking, change management, coaching/mentoring, decision-making, vision setting, conflict resolution

Focus Question: "What leadership abilities does this role require, even if they don't manage people directly?"

Competency Name	What This Actually Means	Proficiency Levels	What You'd See Someone Do
Example: Strategic Thinking	Analyzes complex situations and	Novice: Sees immediate impacts	Novice: Focuses on completing current tasks well

Competency Name	What This Actually Means	Proficiency Levels	What You'd See Someone Do
	develops long-term approaches	Proficient: Considers broader implications Expert: Anticipates systemic effects and creates adaptive strategies	Expert: Others seek their perspective on big decisions, their recommendations prove sound over time

Quick Check: Do these competencies help someone influence outcomes beyond their individual work? Could they demonstrate these even without formal authority?

Step 3: Test Your Framework

Time Estimate: 20 minutes

These Reality Check Questions should be worked through with a colleague or manager.

Clarity Test

Question: "If I gave this to someone unfamiliar with this role, would they understand what each competency means?"

Red Flag: If you're using jargon or vague terms like "excellent communication" without explaining what that looks like.

Observability Test

Question: "Can I point to specific behaviors that show someone has this competency?"

Red Flag: If your "What You'd See Someone Do" column is empty or vague.

Relevance Test

Question: "Do these competencies directly connect to success in this specific role?"

Red Flag: If you're including competencies because they "sound professional" rather than because the role actually needs them.

Completeness Test

Question: "Do these competencies cover the full scope of what makes someone successful in this role?"

Red Flag: If high performers in this role have important skills not captured in your framework.

What Success Looks Like

You'll know your framework is working when:

- Managers can use it to give specific feedback.
 - Employees understand what's expected of them.
 - HR can write clearer job descriptions.
 - People stop asking "What does good performance look like in this role?".
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Troubleshooting Common Problems

"I have too many competencies - everything seems important!"

Solution: Focus on what distinguishes good performers from average ones. If everyone in the role needs it equally, it might not need to be in your framework.

"The competencies are too vague. I keep using words like 'strong' and 'effective'"

Solution: Ask "What would I see this person doing?" for each competency. If you can't describe specific behaviors, keep refining.

"Different people want to add different competencies"

Solution: Go back to your "Before You Start" questions. What's the primary purpose of this framework? Use that to make decisions.

"This feels overwhelming"

Solution: Start with just 3-4 competencies that everyone agrees are critical. You can always add more later.

Next Steps: Using Your Framework

For Instructional Designers/L&D Teams

- Write learning objectives: "By the end of this module, learners will demonstrate proficient-level strategic thinking by..."
- Design authentic scenarios: Create practice situations that require competency application at the appropriate level
- Build assessment rubrics: Use proficiency levels and observable behaviors to create evaluation criteria
- Structure learning pathways: Design experiences that progress from novice to expert systematically
- Create transfer opportunities: Design assignments that bridge learning to real work contexts

For Managers

- Use during performance reviews: "Let's talk about your strategic thinking competency. Here's what I've observed..."
- Set development goals: "To move from proficient to expert in project management, focus on..."

For HR

- Write job descriptions: "This role requires proficient-level data analysis skills, which means..."
- Structure interviews: Ask behavioral questions that reveal each competency level

For Employees

- Self-assessment: "Where am I on each competency? What would it take to move to the next level?"
- Development planning: "What experiences would help me build these competencies?"

Implementation Notes

Individual Competency Assessment Methods

- [] **Performance observation** during actual work situations
- [] **360-degree feedback** from supervisors, peers, direct reports
- [] **Portfolio evidence** of work products and outcomes

- **Behavioral interviewing** using competency-based questions
- **Self-assessment** with structured reflection prompts

Training Effectiveness Assessment

- **Pre/post competency assessment** Measure competency development before and after training
- **Learning transfer evaluation** Follow-up 30-90 days to see if competencies transfer to work performance
- **Behavioral observation checklists** Track specific competency behaviors during and after training
- **Application assignments** Real work projects that require demonstrating target competencies
- **Manager feedback on learner performance** Supervisor reports on competency improvement post-training
- **Competency-based simulations** Realistic scenarios that test competency application under pressure

Development Planning Options

- **Gap analysis** between current and required proficiency
- **Learning pathways** for each competency level
- **Mentoring assignments** for experiential development
- **Stretch projects** to practice emerging competencies
- **Regular check-ins** to monitor progress and adjust plans

Maintenance: Keep It Fresh

- **Quarterly:** Review with high performers - are we missing anything?
- **Annually:** Update based on role changes or new organizational needs
- **When things change:** Job responsibilities shift, new technology, different business priorities

Foundational Sources

This template synthesizes established methodologies from:

- Spencer, L. M., & Spencer, S. M. (1993). *Competence at Work: Models for Superior Performance*. John Wiley & Sons.

- Boyatzis, R. E. (1982). *The Competent Manager: A Model for Effective Performance*. John Wiley & Sons.
- McClelland, D. C. (1973). Testing for competence rather than for intelligence. *American Psychologist*, 28(1), 1-14.

For deeper understanding of competency modeling principles, these sources provide comprehensive frameworks and research foundations.

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This framework provides the foundation for role clarity and performance standards. For guidance on mapping learning experiences to competencies, see the [Curriculum Mapping Template](#). For understanding how competencies develop through practice, see the [Competency Mapping Template](#).