

Competency Mapping Template

What This Template Does for You

This is for when you need to go beyond "what skills do people need" to "how do people actually get good at this work." Use this template when standard training isn't working and you need to understand how expertise really develops in your specific environment.

Use this template when: you need to design learning experiences that develop genuine expertise, understand why some people excel while others struggle, or figure out how to transfer complex knowledge.

Do NOT use this template when: you just need to define competencies (use Competency Framework Template) or align existing training (use Curriculum Mapping Template). This is the most intensive of the three templates.

Is This Template Right for You?

Use this template if:

- People with the same training perform very differently
- You have complex, nuanced work that's hard to teach
- Standard competency frameworks feel too simple for your reality
- You need to understand how experts really think and work
- You're designing learning for critical, high-stakes roles

Consider other options if:

- You just need to hire better people (use competency frameworks for selection)
 - Your training gaps are straightforward (use curriculum mapping)
 - You don't have time for a 4-6 week investigation process
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Before You Start: Gathering Your Team

Time Investment: 4-6 weeks total | **Team Size:** 3-5 people

Essential Team Members

- **1 High Performer** (someone who excels at this work)
- **1 Subject Matter Expert** (knows the technical details)
- **1 Learning Designer** (you or someone who understands learning)
- **1 Manager/Supervisor** (understands business context)

Optional but Helpful

- **Recent learner** (someone who recently acquired these competencies)
- **Stakeholder representative** (clients, customers, other departments)

Pro Tip: Get commitment upfront. This process requires real time investment from your team members.

Investigation Phase

Goal: Understand how expertise actually works in your context

Step 1: Set Up Your Investigation

Time Estimate: 1-2 hours

Before diving into interviews: You need to define what you're investigating and why. This isn't just academic curiosity - you're solving a specific performance problem.

Performance Context Analysis

Target Work Environment: _____ **Target Performance Level:** _____
Expertise Level Being Mapped: _____

Key Questions to Frame Your Investigation:

1. What situations separate good performers from great ones?
2. When do people typically struggle or fail?
3. What can't be taught through normal training?
4. What performance problem are we trying to solve?

Pro Tip: Write these answers down and refer back to them throughout the process. They'll keep you focused on what matters.

Step 2: Critical Incident Investigation

Time Estimate: 3-4 hours of interviews

Focus: Identify the specific situations where expertise makes the biggest difference

How to Conduct These Interviews:

- Schedule 45-60 minutes per expert (don't rush).
- Start with easier questions to build rapport.
- Listen for specific examples, not generalizations.
- Ask follow-up questions: "Can you give me a specific example of that?"
- Take notes on context factors they mention (politics, time pressure, etc.).
- Look for emotional language (words like frustrated, excited, worried) often signal critical moments.

Red Flags During Interviews:

- Experts giving textbook answers instead of real stories.
- Vague responses like "it depends" without specific situations.
- A focus on what they do rather than why it's challenging.

Interview Questions for High Performers

"Tell me about a time when your expertise really made a difference."

1. What made that situation challenging?
2. What did you notice that others might have missed?
3. How did you decide what to do?
4. What would have happened if someone less experienced handled it?

"Describe a situation where someone struggled with something you find routine."

- What did they find difficult?
- What seemed obvious to you but not to them?
- How did you help them understand?

Critical Situations Analysis

Situation Description	What Makes It Challenging	Expert vs. Novice Response	Context Factors	Performance Indicators
Example: Budget crisis requiring immediate program cuts	Multiple stakeholder interests, incomplete data, time pressure	Expert: Focuses on mission impact and stakeholder relationships Novice: Focuses on fairness and following procedures	Political climate, organizational priorities, legal constraints, relationships	Stakeholder buy-in, program continuity, team morale, long-term mission success

Look for patterns: What themes emerge across different critical situations?

You'll know this step is complete when: You have 3-5 rich stories that show clear expert vs. novice differences.

Step 3: Expertise Development Investigation

Time Estimate: 2-3 hours of interviews

Focus: Understand how people actually become experts in your environment

How Expertise Actually Develops

Interview Questions:

- "How did you get good at this?"
- "What experiences were most valuable in developing your expertise?"
- "What do you wish you'd known earlier?"
- "How do you continue learning?"

Knowledge Integration Points

Where discrete knowledge becomes integrated understanding

Knowledge Components	Integration Challenge	Practice Requirements	Recognition Indicators
Example: Regulatory requirements + stakeholder management + project timeline	Balancing compliance with relationship preservation under deadline pressure	Multiple authentic scenarios with competing constraints, coaching through decisions	Can explain trade-offs and rationale, not just final decisions; Others seek their advice

Judgment Development Stages

How decision-making sophistication evolves

Stage	Decision-Making Approach	Support Needed	Practice Opportunities	Assessment Methods
Rule-Following	Applies procedures consistently, seeks guidance for exceptions	Clear guidelines, regular check-ins, immediate feedback	Standard scenarios with clear right/wrong answers	Procedure compliance, outcome quality, speed of task completion
Context-Aware	Adapts procedures based on situational factors	Coaching on context recognition, discussion of decisions	Varied scenarios requiring adaptation, peer review	Quality of adaptations, rationale explanation, stakeholder satisfaction
Integrative	Balances multiple factors dynamically, creates novel solutions	Mentoring, reflective practice, strategic guidance	Complex, ambiguous situations with multiple valid approaches	Stakeholder feedback, long-term outcomes, innovation in approach

How to Recognize Patterns:

- Look for common themes across expert stories. (What do 2+ experts mention?)
- Notice what experts say they “wish they would have known earlier”? These are critical learning points.
- Pay attention to turning points such as “The moment I understood...” or “Everything clicked when...”.
- Identify what can’t be taught in a classroom, such as relationship dynamics, political awareness, and judgement calls.

Quick Assessment: Do you see clear patterns in how expertise develops? Can you identify 2-3 critical situations where competency makes the biggest difference? If not, conduct additional interviews.

Transition to Design Phase:

Before moving to design, validate your investigation findings:

- Can you clearly explain 2-3 critical situations where expertise matters most?
- Do you understand how experts develop differently from novices in your context?
- Have you identified specific barriers that prevent learning transfer?
- Do your patterns make sense to the experts you interviewed?

If you can't answer these confidently, conduct additional interviews before proceeding.

You'll know this step is complete when: You can describe a clear progression from rule-following to expert judgement.

Design Phase

Goal: Turn insights into actionable learning design

Step 4: Transfer Mapping

Time Estimate: 2-3 hours

Focus: Identify why learning often fails to transfer to performance

Start with the problem: Most training fails because it doesn't account for the gap between learning environments and work environments. This step helps you design bridges.

How to Identify Transfer Challenges

- Compare training scenarios to real work situations side-by-side.
- Ask experts: "What's different about the training versus the real thing?"
- Look for missing context: Who are the real stakeholders? What are the real constraints?
- Identify assumption gaps: What does training assume that work doesn't provide?
- Notice emotional differences: Training is safe, work has real consequences.

Learning-to-Performance Bridges

Critical connections between learning experiences and work application

Learning Experience	Work Application	Transfer Challenges	Bridge Strategies	Success Indicators
Example: Conflict resolution workshop	Managing team disagreements during project stress	Workshop scenarios too clean; real conflicts involve office politics, history, power dynamics	Case studies from actual team situations, follow-up coaching, manager support for application	Team reports improved collaboration, conflicts resolved faster, fewer escalations

Context Dependencies

How performance requirements change across situations

Performance Context	Competency Variations	Environmental Factors	Adaptation Requirements
Example: Client-facing vs. internal presentations	External: Diplomatic, benefit-focused, relationship-building Internal: Direct, problem-focused, efficiency-oriented	Client relationship history, business stakes, organizational politics, cultural differences	Audience analysis skills, message tailoring ability, stakeholder mapping

You'll know this step is complete when: You have identified why current training fails and what bridges are needed.

Step 5: Learning Experience Design

Time Estimate: 3-4 hours

Focus: Design learning experiences that develop authentic expertise

Key principle: Expertise develops through authentic practice with appropriate support, not through decomposed skills training.

Design Process for Authentic Practice

1. **Start with a real work situation** from your critical incidents.
2. **Identify what makes it authentic.** (stakeholders, constraints, consequences)
3. **Determine appropriate risk level.** (Can we afford mistakes here?)
4. **Design support that matches the challenge.** (More Challenge = More Support Needed)
5. **Plan feedback that mirrors reality.** (Who would give feedback in the real situation?)

Authenticity Checklist

- Does this feel like real work to the learner?
- Are the stakeholders and constraints realistic?
- Would experts recognize this as a genuine challenge?
- Can learners fail safely while learning from consequences?

Authentic Practice Opportunities

Real-world application with appropriate support

Practice Context	Complexity Level	Support Structure	Feedback Mechanisms	Risk Mitigation
Example: Lead actual project review meeting	Medium - established process, known stakeholders, moderate stakes	Senior advisor observing, pre-meeting prep, post-meeting debrief	Stakeholder reactions, meeting outcomes, advisor feedback, peer input	Advisor can intervene if needed, low-stakes project chosen, clear success criteria

Progressive Challenge Design

Building complexity systematically

Challenge Level	Scenario Characteristics	Support Available	Success Criteria	Next Level Triggers
Foundation	Single stakeholder, clear requirements, familiar context, low stakes	Step-by-step guidance, immediate feedback, safety net	Follows process correctly, achieves basic outcomes, demonstrates understanding	Consistent success, requests more challenge, shows confidence

Challenge Level	Scenario Characteristics	Support Available	Success Criteria	Next Level Triggers
Application	Multiple stakeholders, some ambiguity, standard context, moderate stakes	Coaching available on request, delayed feedback, peer support	Adapts process appropriately, manages stakeholder needs, shows good judgment	Demonstrates creative problem-solving, handles variations well, trusted by others
Integration	Complex stakeholder dynamics, high ambiguity, novel context, high stakes	Mentoring relationship, reflective feedback, strategic guidance	Balances competing demands, creates innovative solutions, develops others	Recognized by others as expert, seeks teaching opportunities, drives systemic improvements

You'll know this step is complete when: You have realistic practice opportunities that experts validate as authentic.

Step 6: Assessment Strategy Design

Time Estimate: 2-3 hours

Focus: Create assessment methods that recognize authentic expertise

Performance-Based Evidence

What to look for in actual work

Competency Aspect	Observable Indicators	Evidence Sources	Quality Markers	Red Flags
Example: Strategic thinking	Anticipates downstream impacts, connects decisions to broader goals, adapts approach based on changing conditions	Meeting contributions, project documentation, stakeholder feedback, decision rationale	Others seek their perspective, decisions stand test of time, stakeholders trust their judgment	Focus only on immediate tasks, surprised by consequences, repeats past solutions without adaptation

Developmental Indicators

Signs that expertise is progressing

Development Stage	Behavioral Indicators	Self-Reflection Quality	Performance Trends	Support Needs
Emerging	Asks thoughtful questions, recognizes complexity, seeks guidance appropriately	Identifies what they don't know, reflects on decisions	Improving consistency, fewer basic errors	Structured guidance, clear examples, regular feedback
Developing	Handles routine variations well, explains reasoning, teaches others	Analyzes what worked/didn't work, connects patterns	Tackling harder challenges, trusted with more autonomy	Coaching and stretch opportunities, peer discussion
Proficient	Others come to them for advice, innovates within role, influences decisions	Connects patterns across situations, anticipates challenges	Consistently good outcomes, recognized expertise	Leadership opportunities, advanced challenges, strategic involvement

Quick Assessment: Can you observe and measure the competency aspects you've identified? Do your assessment methods match the complexity of the expertise you're trying to develop?

You'll know this step is complete when: Your assessment methods match the complexity of expertise you're developing.

Translation Guide: From Insights to Action

Step 7: Convert Insights to Learning Design

Time Estimate: 1-2 hours

Focus: Transform your investigation findings into practical learning experiences

Convert Critical Incidents to Learning Scenarios

1. **Take your critical incidents** from Step 2
2. **Create practice scenarios** that include the same challenges and context factors
3. **Design support structures** that help learners develop expert-like responses
4. **Build in feedback loops** that mirror real-world consequences

Convert Expertise Development to Learning Pathways

1. **Map the progression** from rule-following to integrative thinking
2. **Design experiences** for each stage that match the support needs you identified
3. **Create support systems** (mentoring, coaching, peer review) that match each development level
4. **Build assessment** that recognizes growth over time, not just final performance

Convert Transfer Challenges to Organizational Support

1. **Remove barriers** between learning and application you identified
2. **Create bridges** through manager involvement and workplace integration
3. **Reward application** and experimentation, not just learning completion
4. **Measure impact** on actual work performance using your performance indicators

Implementation Tips

For Instructional Designers/L&D Teams:

- **Start with one critical competency:** Don't try to map everything at once
- **Involve experts throughout:** High performers should help design, not just inform
- **Test with real scenarios:** Pilot learning experiences in authentic contexts before full rollout
- **Plan for iteration:** First attempts won't be perfect - build in improvement cycles
- **Document the process:** Your insights will inform future competency mapping projects
- **Focus on transfer:** Design explicit bridges between learning and work application

For Managers and Organizations:

- **Support the investigation:** Give experts time to participate in interviews and design
- **Provide authentic practice opportunities:** Allow safe-to-fail experiments in real work
- **Recognize context-aware performance:** Reward adaptation and judgment, not just rule-following
- **Invest in progressive challenges:** Career development requires increasingly complex experiences
- **Measure long-term impact:** Track expertise development over months and years, not just training completion

For Employees/Learners:

- **Embrace complexity:** Expertise development is messy and non-linear
 - **Seek authentic practice:** Look for opportunities to apply learning in realistic contexts
 - **Reflect on context:** Notice how situation factors affect what approaches work
 - **Learn from experts:** Seek mentoring and feedback from high performers
 - **Be patient with progression:** Moving from rule-following to integrative thinking takes time
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Assessment Methods

Individual Competency Assessment

- **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

Learning Experience Effectiveness Assessment

- **Pre/post expertise assessment** - Measure competency development before and after learning experiences
- **Transfer to authentic performance** - Follow up 60-120 days to assess application in real work contexts
- **Expert validation of learner progress** - High performers evaluate learner development against authentic standards
- **Critical incident simulation performance** - Test learner responses to complex, realistic scenarios

- [] **Progression through challenge levels** - Track advancement from foundation to integration stages
 - [] **Stakeholder feedback on learner impact** - Assess how learning translates to workplace effectiveness
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Timeline Expectations

Why This Takes Time

- **Step 1:** Setting up requires stakeholder buy-in and expert commitment.
- **Step 2:** Critical incident interviews can't be rushed - you need rich stories and context.
- **Step 3:** Expertise development patterns only emerge through multiple expert perspectives.
- **Step 4:** Transfer mapping requires comparing learning environments to work environments carefully.
- **Step 5:** Good learning design takes iteration and testing with real scenarios.
- **Step 6:** Assessment strategy needs validation from both experts and learners.

Speeding Up the Process

Can compress to 3-4 weeks if:

- You have dedicated, available team members
- High performers are readily accessible for interviews
- Clear scope and focused questions are defined upfront
- Existing performance data and examples are available

Don't skip:

- Multiple expert perspectives (at least 2-3 high performers)
 - Critical incident story collection (specific examples, not generalizations)
 - Context variation analysis (how performance changes across situations)
 - Transfer challenge identification (why current training isn't working)
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Validation Process

Expert Review Checklist

- **High performers** confirmed accuracy of expertise descriptions and development patterns
- **Subject matter experts** validated technical aspects and critical incident analysis
- **Supervisors** verified relevance to job performance and business context
- **Recent learners** provided input on development progression and support needs

Pilot Testing Requirements

- **Learning experiences** tested with target audience in realistic conditions
- **Assessment methods** piloted and refined based on authentic performance
- **Transfer support** evaluated for effectiveness in bridging learning to work
- **Context factors** confirmed through real workplace application

Continuous Improvement Process

- **Performance data** collected and analyzed every 3-6 months
 - **Environmental changes** monitored and integrated (new processes, tools, stakeholders)
 - **Learner feedback** systematically gathered and applied to improve experiences
 - **Expert updates** incorporated as expertise requirements evolve
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Critical Success Factors

1. **Authentic Context:** Practice must mirror real work conditions, constraints, and stakeholder dynamics
 2. **Expert Involvement:** High performers must actively participate in design and validation, not just provide input
 3. **Progressive Challenge:** Build complexity systematically over time with appropriate support at each stage
 4. **Transfer Support:** Explicitly bridge learning to performance with organizational backing
 5. **Patience with Process:** Expertise development takes time - resist pressure for quick fixes
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Foundational Sources

This template synthesizes established methodologies from:

- Dreyfus, H. L., & Dreyfus, S. E. (1986). *Mind Over Machine: The Power of Human Intuition and Expertise in the Era of the Computer*. Free Press.
- Ericsson, K. A. (1993). The role of deliberate practice in the acquisition of expert performance. *Psychological Review*, 100(3), 363-406.
- Schön, D. A. (1983). *The Reflective Practitioner: How Professionals Think in Action*. Basic Books.
- Benner, P. (1984). *From Novice to Expert: Excellence and Power in Clinical Nursing Practice*. Addison-Wesley. [Expertise development stages]

For deeper understanding of expertise development and reflective practice principles, these sources provide comprehensive frameworks and research foundations.

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This template reveals how expertise develops through authentic practice. For defining competency standards, use the Competency Framework Template. For aligning learning to requirements, use the Curriculum Mapping Template.