



## Tool 12-1. Competency Engagement Checklist

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Based on Chapter 12, “Identifying Real-World Leadership Competencies,” in *The ASTD Leadership Handbook*, edited by Elaine Biech, © 2010 ASTD

**Purpose:** Use this checklist to integrate leadership competencies into your organization’s operation for best-in-industry results.

### Step 1: Assemble Team and Clarify the Core

- ☐ Gather focus group
  - Influential role models
  - All functions represented
- ☐ Clarify the core
  - Values
  - Vision

### Step 2: Document List of All Relevant Processes or Deliverables

- ☐ Map process of exterior customer experience
- ☐ Map process of employee experience

### Step 3: Create Initial Competency List and Categorize

- ☐ Brainstorm list of knowledge and skills required to lead all aspects of the employee and customer experiences
  - Internal culture
  - External service/brand
  - Operational/financial
- ☐ Distill or simplify

### Step 4: Team Validation and Buy-In

- ☐ Establish process for communication and feedback
- ☐ Prepare focus group representatives to lead or support process
- ☐ Announce initiative or process to leaders throughout organization
- ☐ Create forum to communicate support or concerns
- ☐ Finalize competency list

### Step 5: Connect to the Operation

- ☐ Integrate new competencies into
  - recruitment
  - selection
  - training

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### **Step 6: Create Accountability Infrastructure**

- ☐ Identify achievement goals
- ☐ Integrate new competencies into recognition
- ☐ Identify incentives

### **Step 7: Revisit, Learn, Celebrate, and Improve**

- ☐ Gather feedback regarding new competencies
- ☐ Assess relevancy and impact on the internal or external results
- ☐ Share information across entire leadership team
  - Celebrate the insights
  - Gather improvement ideas
- ☐ Implement improvement solutions