



## SKILLS VERIFICATION CHECKLIST

(To be completed by the Candidate's Supervisor)

### SENIOR MANAGER

Candidate: \_\_\_\_\_

Registration No.: \_\_\_\_\_ Candidate Job Title: \_\_\_\_\_

Period Covered: \_\_\_\_\_ Avg. No of Work Hrs per Wk: \_\_\_\_\_

Employer: \_\_\_\_\_ Supervisor: \_\_\_\_\_

Supervisor's Job Title: \_\_\_\_\_

Supervisors Professional Qualification (Optional): \_\_\_\_\_

- 1 – 2: Below minimum standards of competence  
3: Meets minimum standards of competence  
4: Meets most standards of competence  
5: Meets highest standards of competence

Senior Manager Competencies		Have Competencies been achieved in this period (YES/NO)	Supervisor's Comments (Highlight strengths and weaknesses and future work experience and development requirements)
1.	<b>MANAGING PEOPLE:</b> <b>Determines Resource Requirements; Executes a Staffing Strategy:</b>  Develops and executes a staffing strategy that aligns with the organization's business objectives: <ul style="list-style-type: none"><li>■ Defines an organizational structure, roles, and responsibilities that support the department's staffing strategy</li></ul>		
2.	Creates, implements, and manages a strategic staffing plan that supports the organization's business objectives: <ul style="list-style-type: none"><li>■ Analyzes workforce composition for required knowledge, skills, and abilities</li><li>■ Develops, implements and manages a short-term (3-12 months) staffing plan with an appropriate workforce mix</li><li>■ Develops, implements and manages a long-term (12-60 months) staffing plan</li><li>■ Develops and executes a succession strategy</li><li>■ Creates, implements, and manages a succession plan</li></ul>		

<b>Senior Manager Competencies</b>		<b>Have Competencies been achieved in this period (YES/NO)</b>	<b>Supervisor's Comments (Highlight strengths and weaknesses and future work experience and development requirements)</b>
3.	Applies best practices for recruiting, interviewing and hiring: <ul style="list-style-type: none"> <li>■ Creates and implements a recruiting plan</li> <li>■ Recruits a diverse workforce</li> <li>■ Conducts interviews</li> <li>■ Selects personnel based on best-fit</li> </ul>		
4.	Develops and executes a retention strategy: <ul style="list-style-type: none"> <li>■ Identifies factors that contribute to and distract from staff retention</li> </ul>		
5.	<b>Determines Professional Development and Learning Needs: Develops and Executes a Professional Development Strategy:</b> Creates and sustains a work environment and culture that enables professional development and continuous learning. <ul style="list-style-type: none"> <li>■ Provides opportunities for ongoing professional development and continual improvement</li> <li>■ Provides access to appropriate tools and resources for professional development and learning</li> <li>■ Establishes and applies principles of mentoring and coaching</li> </ul>		
6.	Determines knowledge and skill requirements for all job roles in the department		
7.	Determines present and future professional development and learning needs of the department staff		
8.	Identifies the strengths and development needs of direct reports		
9.	Develops, executes and supports a training strategy: <ul style="list-style-type: none"> <li>■ Creates and implements a professional development and training plan based on established strategy</li> <li>■ Creates and implements a plan to evaluate the effectiveness of training</li> </ul>		
10.	Aligns the department's training initiatives with the organization's business objectives		
11.	Implements and supports an orientation program (to the organization; department; job role; and team)		
12.	Identifies areas for self-improvement; creates and implements a plan for ongoing self-improvement		
13.	<b>Manages Individual and Team Performance:</b> Establishes objectives for individual and team performance		

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14.	Develops a methodology to monitor and improve performance		
15.	Implements a monitoring and coaching program		
16.	Addresses poor performance constructively and within applicable guidelines		
17.	Conducts a performance review: <ul style="list-style-type: none"> <li>Identifies different behavioral styles of staff</li> <li>Collaborates with staff to establish performance objectives and work standards</li> <li>Discusses strengths and weaknesses of staff</li> <li>Documents a performance review</li> </ul>		
18.	Develops, implements, and administers a compensation plan to recognize and reward performance excellence		
19.	Cultivates and sustains a work environment that motivates high performance, recognizes and rewards individual and team excellence; and instills employee loyalty: <ul style="list-style-type: none"> <li>Implements and administers an incentive plan</li> </ul>		
	<b>Manages Human Resources:</b>		
20.	Builds, manages and leverages a diverse workforce		
21.	Manages contract and temporary staff in accordance with applicable organizational policy and regulations		
22.	Aligns employee-related decisions with applicable organizational policy and regulations		
23.	Manages remote staff in accordance with applicable organizational policy and regulations		
24.	Addresses privacy issues in accordance with applicable organizational policy, regulations, and moral/ethical considerations		
25.	Designs and establishes a career path model: <ul style="list-style-type: none"> <li>Identifies and implement appropriate actions based on survey results</li> <li>Tracks and use organization-wide satisfaction data to enhance the department's image and resolve issues</li> </ul>		
26.	Applies principles of conflict resolution		

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27.	Identifies and enables empowerment opportunities: <ul style="list-style-type: none"> <li>■ Provides the tools, authority, and support to enable employee decision-making (including decisions formerly dictated by management)</li> <li>■ Identifies and addresses obstacles to empowerment</li> <li>■ Develops the trust and support of department staff and other personnel</li> </ul>		
28.	<b>Creates and Leads Teams:</b> Establishes and sustains a culture that enables a high-performance team		
29.	Creates and sponsors a cross-functional team through shared vision, goals, and planning: <ul style="list-style-type: none"> <li>■ Develops and aligns team goals with organizational objectives</li> <li>■ Accesses the organization's resources to support shared initiatives and objectives</li> <li>■ Leads a cross-functional team</li> </ul>		
30.	Identifies and executes a strategy for building team effectiveness: <ul style="list-style-type: none"> <li>■ Determines and establishes a team structure</li> <li>■ Models and instills team building skills (e.g., conflict resolution; role clarification; effective communications; goal setting)</li> </ul>		
31.	Leverages expertise and builds collaborative relationships		
1.	<b>MANAGING OPERATIONS:</b> <b>Establishes, Achieves, and Maintains Service Level and Quality Goals:</b> Negotiates, establishes, and maintains internal and external service level agreements with business units and service providers that have an impact on the department's performance: <ul style="list-style-type: none"> <li>■ Develops and implements a plan to meet service level agreements</li> <li>■ Creates a service provider assessment instrument to manage service level agreements</li> <li>■ Utilizes a service provider assessment instrument to manage vendors</li> </ul>		
2.	Establishes service level, response time, and quality goals: <ul style="list-style-type: none"> <li>■ Creates a plan to meet service level, response time, and quality goals</li> <li>■ Maintains agreed service level and quality standards</li> </ul>		

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3.	Establishes key performance indicators that enable the department to meet customer requirements: <ul style="list-style-type: none"> <li>■ Develops and utilizes a mechanism to track and report key performance indicators data</li> <li>■ Manages the department in adherence with established key performance indicators</li> <li>■ Identifies obstacles to meeting key performance indicator targets; enacts a resolution that meets customer requirements and supports the department's business objectives</li> </ul>		
4.	Forecasts workload using statistical techniques: <ul style="list-style-type: none"> <li>■ Optimizes staff and schedule requirements</li> <li>■ Creates and implements a plan to ensure the department's contact activities meet requirements</li> </ul>		
5.	Schedules staff to forecasted workload: <ul style="list-style-type: none"> <li>■ Assures adherence to schedule</li> </ul>		
6.	Identifies and applies principles that enable continuous quality assurance and process improvement		
7.	<b>Aligns Technologies and Processes to Maximize Service Delivery:</b> Aligns technology with business objectives, application need(s), and financial considerations: <ul style="list-style-type: none"> <li>■ Maximizes the department's investment in technology</li> <li>■ Manages the implementation of technology</li> <li>■ Ensures technology is implemented with minimal negative impact</li> </ul>		
8.	Identifies and addresses single-site versus virtual-site environments issues (multi-site, remote agents, etc.)		
9.	Identifies and manages key customer-related processes		
10.	Aligns technology, processes and customer requirements to enhance service and reduce cost		
11.	Evaluates the applicability of new and emerging technology to enable enhanced customer service and better support business objectives: <ul style="list-style-type: none"> <li>■ Develops a business case to evaluate new and emerging technology</li> <li>■ Ensures successful integration of new technology with legacy systems</li> <li>■ Leverages system integration opportunities to maximize service delivery</li> </ul>		

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12.	Formulates and executes a call distribution strategy: <ul style="list-style-type: none"> <li>Develops a call distribution rationale</li> </ul>		
13.	<b>Selects and Designs a Contact Department Site; Manages the Work Environment:</b> Applies the principles of site selection and design: <ul style="list-style-type: none"> <li>Develops site selection criteria based on the organization's business objectives</li> </ul>		
14.	Selects a site based on agreed selection criteria and approved business case: <ul style="list-style-type: none"> <li>Develops a site selection business case that aligns with strategic objectives</li> </ul>		
15.	Assesses floor plan design options: <ul style="list-style-type: none"> <li>Selects an optimal floor plan design</li> </ul>		
1.	<b>MANAGING RELATIONSHIPS:</b>  <b>Manages Internal and External Customer Relationships:</b> Identifies the dynamics and economics of customer acquisition, retention, value, and access: <ul style="list-style-type: none"> <li>Segments customers to align with organizational strategy</li> <li>Identifies and quantifies customer expectations and related business drivers</li> <li>Identifies the fundamental aspects of consistently delivering a positive customer experience</li> </ul>		
2.	Evaluates the effectiveness of service delivery and its impact on customer satisfaction: <ul style="list-style-type: none"> <li>Measures customer satisfaction</li> <li>Uses root cause analysis to identify areas of poor service and factors that contribute to customer satisfaction</li> <li>Monitors and tests customer accessibility</li> <li>Establishes a mechanism for capturing and leveraging customer feedback throughout the organization</li> </ul>		
3.	Develops a strategy to manage and enhance the customer experience: <ul style="list-style-type: none"> <li>Contributes to the organization's customer service strategy and business planning process</li> <li>Designs and applies an operational model that meets customer needs and organizational requirements</li> <li>Develops and executes a strategy that aligns human resources, business processes, and technology to assure a positive customer experience</li> </ul>		

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4.	Establishes the value of a positive customer relationship: <ul style="list-style-type: none"> <li>Creates and implements a plan that communicates the benefits of a positive and meaningful customer experience</li> </ul>		
5.	Develops partnerships that help to identify customer needs and enable a successful customer relationship management strategy: <ul style="list-style-type: none"> <li>Builds networks of people (internal and external) to support successful customer relationships</li> <li>Maintains relationships with colleagues to support a successful customer relationship</li> <li>Collects and disseminates business and market intelligence to stockholders</li> </ul>		
6.	Identifies and implements technology and processes that enhance the customer experience: <ul style="list-style-type: none"> <li>Identifies processes that empower people to improve the customer experience</li> <li>Develops and activates a process that improves customer accessibility</li> <li>Utilizes technology to gather and disseminate customer intelligence and feedback</li> <li>Identifies and enables self-service options for customers</li> </ul>		
1.	<b>EXERCISING LEADERSHIP:</b>  <b>Applies Leadership Practices, Principles, Values, and Vision:</b>		
	Collaborates with staff to establish the department's vision and mission: <ul style="list-style-type: none"> <li>Creates a shared vision resulting in employee commitment and loyalty</li> <li>Aligns day-to-day activities with the department's vision and mission</li> <li>Communicates the department's vision, mission, and role to internal and external audiences</li> <li>Models the organization's core values, principles, and philosophies</li> <li>Determines community relations initiatives and implements appropriate programs and activities</li> </ul>		
	2. Develops and executes a strategy to accomplish the department's mission and supports organizational objectives		
3.	Aligns the department's objectives with organizational and customer objectives		

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4.	Positions and promotes the department as value-added to the organization: <ul style="list-style-type: none"> <li>Identifies how the department adds value to the organization</li> <li>Develops and implements a plan that communicates the department's value proposition</li> </ul>		
5.	Acts as a conduit for information flow from customers and employees to senior management		
6.	<b>I. Goal-Oriented Characteristics:</b>  <b>Achievement:</b> <ul style="list-style-type: none"> <li>Takes calculated risks to achieve unprecedented outcomes</li> <li>Seeks to exceed the performance of others and continuously strives to improve his/her own performance</li> <li>Seeks significant increases in the attainment of department objectives and takes personal responsibility for outcomes</li> <li>Demonstrates a definite sense of direction and purpose</li> </ul>		
7.	<b>Initiative:</b> <ul style="list-style-type: none"> <li>Takes innovative action to the point of impacting strategic direction and product/service development with the organization</li> <li>Acts to position the department with internal and external customers by building relationships and positioning future department products and services to align with customer needs and business objectives</li> <li>Is visible and accessible to internal customers</li> <li>Puts forth extra effort to ensure successful customer relationships</li> <li>Takes self-directed action to remove barriers that enable quality work results</li> </ul>		
8.	<b>Concern for Continuous Improvement:</b> <ul style="list-style-type: none"> <li>Leverages existing systems to improve customer processes</li> <li>Provides requirements for new systems to improve customer processes</li> <li>Monitors ongoing customer satisfaction</li> <li>Continually raises the standard of quality in the work of him/herself and others</li> <li>Plans and monitors actions and tactics to ensure effective and efficient use of resources in order to make the greatest impact on the department's business objectives</li> </ul>		



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9.	<b>II. Helping/Service Characteristics:</b>  <b>Customer Service:</b> <ul style="list-style-type: none"> <li>■ Develops and implements plans to align products/services with customer needs</li> <li>■ Aligns department processes with the internal customer business processes</li> <li>■ Acts as an internal advocate for external customers</li> <li>■ Takes appropriate action to bring problems to final resolution regardless of recognition or ownership</li> <li>■ Builds networks to support customer relationships</li> <li>■ Determines realistic customer expectations and needs in order to improve customer satisfaction</li> </ul>		
10.	<b>Interpersonal Understanding:</b> <ul style="list-style-type: none"> <li>■ Demonstrates and acts on an understanding of the collective concerns of personnel</li> <li>■ Demonstrates and acts on an understanding of the personal interests, concerns, motivations, and needs of customers</li> <li>■ Seeks to understand the motivations of influential people within the organization</li> <li>■ Reads and understands verbal and non-verbal behaviour and responds appropriately</li> </ul>		
11.	<b>III. Leading Others Characteristics:</b>  <b>Team Leadership:</b> <ul style="list-style-type: none"> <li>■ Creates cross-functional teams through shared vision, goals, and planning</li> <li>■ Solicits the input of others and leverages expertise through collaborative relationships</li> <li>■ Promotes a spirit of cooperation between team members</li> <li>■ Clarifies and communicates roles and expectations of team members</li> <li>■ Accesses organizational resources to support shared objectives</li> <li>■ Creates team synergy through cross-functional involvement</li> </ul>		
12.	<b>Developing Others:</b> <ul style="list-style-type: none"> <li>■ Creates a continuous learning environment that fosters professional development opportunities</li> <li>■ Identifies professional development needs to meet future demands</li> <li>■ Contributes to individual, team, and corporate knowledge</li> <li>■ Provides routine coaching and mentoring</li> </ul>		

Senior Manager Competencies		Have Competencies been achieved in this period (YES/NO)	Supervisor's Comments (Highlight strengths and weaknesses and future work experience and development requirements)
13.	<b>IV. Thinking/Problem Solving Characteristics:</b>  <b>Analytical/Problem Solving:</b> <ul style="list-style-type: none"> <li>Effectively analyzes cause and effect relationships</li> <li>Continually implements a structured process of collecting and analyzing information</li> <li>Develops models to conduct comparisons between alternative scenarios with multiple variables (e.g., product demand, price, competition, margins)</li> <li>Systematically organizes the parts of a problem or situation</li> <li>Demonstrates an understand of how problems are related and interact in order to create an outcome</li> <li>Identifies parameters and considerations for decision making</li> <li>Gathers relevant information to resolve a problem or issue</li> </ul>		
14.	<b>Conceptual Thinking:</b> <ul style="list-style-type: none"> <li>Thinks globally and develops integrated solutions that address long-term business needs</li> <li>Forecasts energy trends related to the department and organization</li> <li>Considers the entire system to identify underlying issues or causes that are not obvious to others</li> </ul>		
15.	<b>Decisiveness:</b> <ul style="list-style-type: none"> <li>Makes decisions that are based on an objective analysis</li> <li>Takes time to fully understand the implications before making a decision</li> <li>Makes sound decisions with available information when under pressure and/or adverse conditions</li> </ul>		
16.	<b>V. Innovation and Change Characteristics:</b>  <b>Creativity and Innovation:</b> <ul style="list-style-type: none"> <li>Seeks out opportunity</li> <li>Develops and executes innovative strategies</li> <li>Cultivates an environment that fosters innovation</li> <li>Recognizes and rewards creativity in others</li> <li>Thinks outside the box</li> <li>Creates and introduces new ideas, methods, and processes</li> <li>Effectively articulates the benefits and disadvantages of new ideas</li> </ul>		

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17.	<b>Change Management:</b> <ul style="list-style-type: none"> <li>Proactively recognizes situations where change is needed and initiates appropriate action</li> <li>Redirects the efforts of department personnel and/or adapts their approach when faced with change</li> <li>Plans in response to changing conditions rather than pursuing a single course of action</li> <li>Ensures that department personnel embrace the need for change</li> <li>Reacts positively to change, readily cooperating with revised methods and priorities</li> <li>Anticipates change and prepares self and team</li> </ul>		
18.	<b>Risk Taking:</b> <ul style="list-style-type: none"> <li>Analyzes the implications and risks of actions from numerous perspectives</li> <li>Uses failure as an opportunity for learning</li> <li>Takes risks to see new ideas come to fruition</li> <li>Evaluates the potential impact of risks on an ongoing basis</li> <li>Supports others who take appropriate risks that fail and responsibility for the outcome</li> </ul>		
19.	<b>VI: Communication Characteristics:</b>  <b>Effective Communications:</b> <ul style="list-style-type: none"> <li>Solicits, analyzes, synthesizes, and shares information with business units</li> <li>Writes in a manner that encourages the reader to take positive action</li> <li>Makes effective verbal presentations (included tailoring the terminology to fit the audience)</li> <li>Clearly and concisely expresses written information without mixed or hidden messages</li> <li>Effectively uses nonverbal communication techniques</li> </ul>		
20.	<b>Influencing:</b> <ul style="list-style-type: none"> <li>Uses an ethical strategy to influence the outcome of situations</li> <li>Uses effective interpersonal and communication skills to gain acceptance of and commitment to plans, ideas, initiatives, etc.</li> <li>Gains commitment of others by defining the benefit and outcome of an initiative, plan, project, etc.</li> <li>Uses trust as a key aspect of an influential relationship</li> <li>Gains the cooperation and support of others not under his/her supervision</li> </ul>		

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21.	<b>Negotiating:</b> <ul style="list-style-type: none"> <li>Identifies the position and concern of others on issues of vested interest</li> <li>Articulates specific points in agreement and disagreement</li> <li>Seeks a win/win without relegating to compromise</li> </ul>		
22.	<b>Organizational Awareness:</b> <ul style="list-style-type: none"> <li>Acts as a catalyst for senior management to address organizational issues and policies</li> <li>Recognizes corporate issues that relate to the department</li> <li>Translates organizational objectives into department goals</li> <li>Demonstrates an understanding of the organization's informal political network and how resources are used</li> <li>Works effectively with senior management</li> <li>Manages project plans to ensure the timely delivery of outcome</li> </ul>		
23.	<b>Personal Effectiveness Characteristics:</b> <ul style="list-style-type: none"> <li>Continues to pursue goals until they are achieved, changed, or no longer attainable</li> <li>Accurately and completely represents the department's and/or organization's value and capabilities to others</li> <li>Serves as a role model for others by demonstrating appropriate business conduct and ethical principles</li> <li>Demonstrates an awareness of and confidence in his/her strengths and weaknesses</li> <li>Keeps emotions under control when facing adversity</li> <li>Interacts effectively with management and customers at all levels and with different backgrounds and perspectives</li> <li>Adapts his/her position, decision, and/or strategy based on changing information and/or circumstances</li> <li>Applies procedures with flexibility and applicability to the situation</li> <li>Demonstrates a comfort level with the pace of change in the organization, department, marketplace, and business trends</li> <li>Demonstrates ability to multitask</li> </ul>		

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*You may attach a copy of the organization's own internal documentation, provided that it addresses the achievement of elements of Competencies*

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**Candidate's Signature:** \_\_\_\_\_

**Date:** \_\_\_\_\_

**RECOMMENDATION:** I attest that the above information is true and understand that any misinformation provided may affect the candidacy of the applicant. I recommend this individual for certification and verify that the candidate currently holds the position of Senior Manager.

**Supervisor's Signature:** \_\_\_\_\_

**Date:** \_\_\_\_\_

### **Resources Implications**

The worker to be assessed should have access to appropriate training material, equipment used for work, workplace policies and procedures and good working conditions.

### **Method and Context of Assessment**

Competency should be assessed under normal working conditions, but abnormal situations may be very informative but not judgmental.

Assessment may be done in the actual workplace or in a simulated environment.

Assessment may be a one-off check as well as intermittent checks at various stages of the job.

Assessment should be done in accordance with the outlined competencies as well as the organization's policies and procedures.

Skills and knowledge will be assessed in tandem with the stated critical performance competencies.