Ayala | group of companies

Career Management Toolkit

Sustaining Growth Through Our People

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OBJECTIVES

- Review the **context and insights** that informed our talent management strategy.
- Recognize the talent management **frameworks** that will align talent priorities with our organization.
- Determine the **three-year roadmap** to set up a best-in-class talent management system.
- Discuss the details of the **talent management deliverables of employees** in the areas of:
  - Talent Mobility
  - Career Management
  - Performance Management
  - Capability Development

AGENDA

I. **Growth Path System (GPS)**
- Talent Mobility Compass
- Career Management Framework (FAR)
- Performance Management System (SPEED)
- Capability Development
  - EDUCATION: Leadership Development (LEAP)
  - EXPOSURE: Coaching for PEAK Performance
  - EXPOSURE: Mentoring Agreement Program (MAP)
  - EXPERIENCE: Secondment Program (MOVES)
  - EXPERIENCE: Taskforce Program (LTE)
  - Activity: Individual Development Plan (IDP)
- Career Pathing
  - Activity: Career Pathing and Talent Profiling
- Career Conversation (GUIDE) for Employees
- RECAP and TIMELINES for EMPLOYEES

GROWTH PATH SYSTEM

How do we progress and grow in our career?

OUR GROWTH PRINCIPLES

There are "Multiple Futures" we need to be ready for…

Future of Industries

- Industries are in constant flux, facing disruption and reinvention.
- "Start-up shake up" brings agile entrants altering business models.
- Value creation rules for customers are being redefined.

Future of Technology

- Traditional systems to cloud-based architecture
- Unprecedented explosion of data and information
- Robotics and AI infiltrating multiple sectors

Future of Leadership

- Leadership driven by influence, empathy, and inclusion.
- Digitally savvy, able to 'disrupt disruption'.
- Embrace shorter cycles, experiment, move faster.
- Leverage cross-functional collaboration.

Future of Talent and Organization

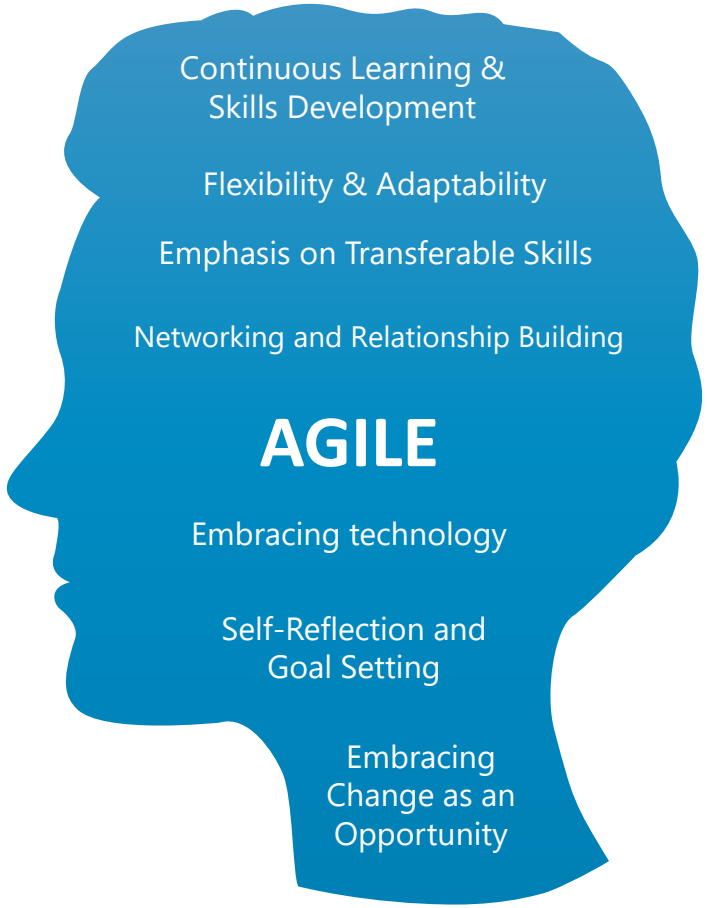
- Digital disruption and enablement at the workplace
- The post-millennial generation at the workplace
- Radically different motivations and aspirations of the workforce

SOURCE: Deloitte

A CRITICAL MINDSET EVOLUTION

The real benchmarks are set by our people. For us to continuously achieve our organizational ambitions, our workforce must thrive in a culture of high performance and agility.

For Ayala to grow, our people must be able to grow.



From Linear Career Management → **To Dynamic Career Management**

OUR GROWTH PRINCIPLES

Our career management principle, embraced by ALL within the organization, is to nurture a culture of synergy and agility that empowers everyone's dynamic and evolving professional development journey.

A — ACCESSIBLE

Define a talent philosophy for a seamless sharing and utilization of expertise across the organization. Talent Network plays a central role in facilitating visibility, transparency, cross-functional collaboration and knowledge exchange to maximize collective capabilities.

HR

G — GROUNDED

Talent management practices aligned with the specific BU needs, distinct culture and corporate strategy, with Top Management fostering a culture of adaptability and customization to ensure optimal talent utilization while maintaining strategic focus.

Top Management

I — INDIVIDUAL DRIVEN

Each employee takes ownership of their professional growth and development, with the responsibility to pursue learning opportunities, set goals, and collaborate with mentors and leaders to shape their career paths.

Employees

L — LATTICE THINKING

Promotes pragmatic, multi-directional movements and skill diversification, with the responsibility of all Leaders to encourage and support employees in exploring various roles, experiences and reasonable movements that enhance their skills and contribute to their holistic career development and net-gain of the Ayala group.

Functional Leaders

E — EXPERIENTIAL

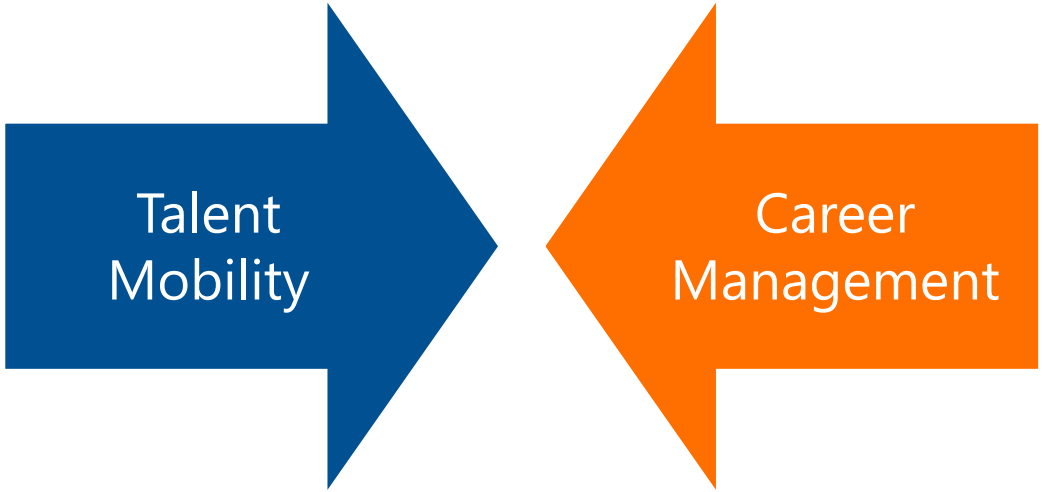
The best development option emphasizes hands-on experiences, including on-the-job assignments, immersions or shadowing, for growth, with mentors entrusted to guide, challenge, and provide constructive feedback during experiential learning journeys.

Mentors

UNDERSTANDING OUR GROWTH PATH SYSTEM

Talent Mobility is about moving employees for organizational needs, while Career Management focuses on individual growth.

Talent Mobility involves the movement of employees across different roles, functions, or locations within an organization to leverage their skills and potential, promote their growth, and meet organizational needs. It emphasizes the **fluidity** and **adaptability** of the workforce.



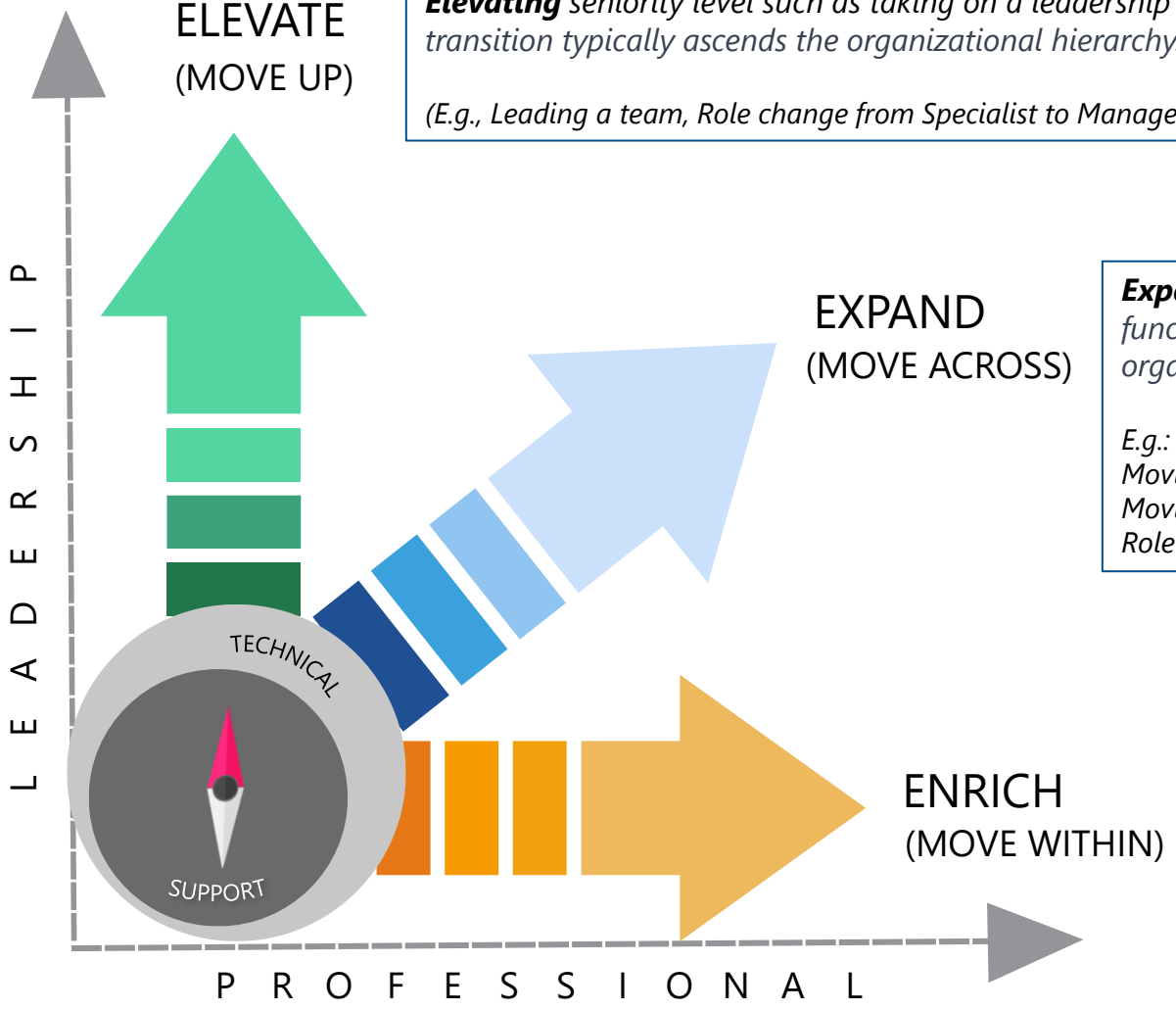
Career Management focuses on the individual employee's long-term career growth and development. It involves setting goals, identifying strengths and areas for improvement, and planning actions to achieve those goals..

TALENT MOBILITY

How does it work within our company, specifically in terms of the different movement types and growth opportunities available for us?

TALENT MOBILITY COMPASS

A **career compass** will help us understand the possible growth directions in the company.



Elevating *seniority level such as taking on a leadership role. This transition typically ascends the organizational hierarchy.*

(E.g., Leading a team, Role change from Specialist to Manager)

Expanding *expertise by broadening knowledge and skills. This move can be cross-functional, involving vertical and/or horizontal advancement within the organization.*

E.g.:
Moving from one job area to another (Operations to HR)
Moving to another Ayala entity in a similar role
Role change from different field - Software Developer to Project Manager

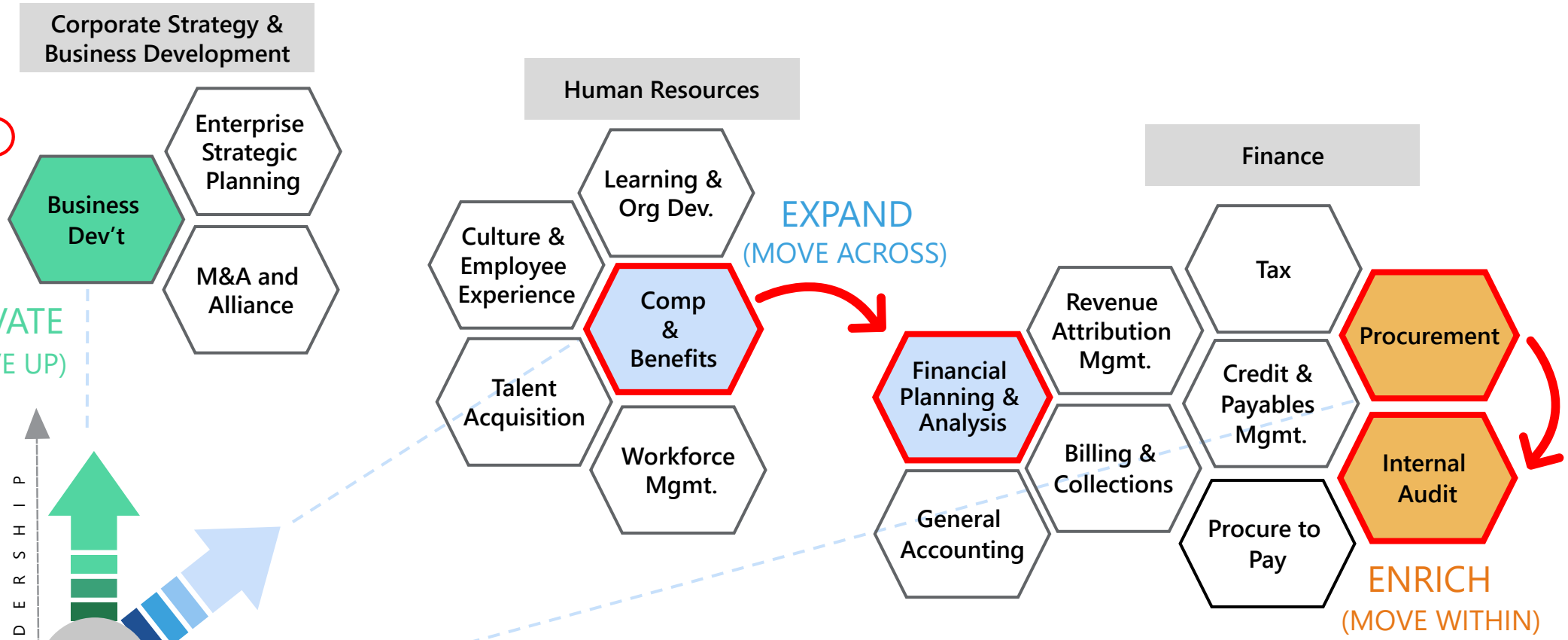
Enriching *current abilities, knowledge, and experience to become a "subject matter expert." This progression involves horizontal advancement within the organization.*

E.g.:
Becoming more of an expert in a specific area
Role change from same field - Marketing Research Specialist to Digital Advertising

TALENT MOBILITY DIRECTIONS

Talent Mobility is moving upward, across, and sideways.

CAREER LEVEL	GRADE
Managing Director	12
Executive Director	11
Senior Vice President	10
Vice President	9
Assistant Vice President	8
Senior Manager	7
Manager	6
Senior Associate	5
Associate	4
Specialist	3
Senior Staff	2
Staff	1



Note: Diversifying our skills is the new game as skills have a lifespan of 2-3 years only according to studies!

UNDERSTANDING OUR JOB ARCHITECTURE

The components of Job Architecture will guide employees with their career compass directions and paths.

JOB ARCHITECTURE COMPONENTS	DEFINITION	EXAMPLE	WHAT IT REFLECTS
JOB FAMILY	**Job Families:** Specific functional areas or disciplines within the organization. Each job family encompasses roles that share common skill sets, expertise, and responsibilities. Job families help organize roles based on their primary function.	**Marketing**	Group / Department or Job Area
JOB FIELD	**Job Field:** Sub-categories within job families that further specify areas of specialization. Sub-families provide a more detailed breakdown of roles within a job family, focusing on distinct skills or expertise.	**Digital Marketing**	Unit / Job Specialization
CAREER BANDS	**Career Bands:** Broad categories that group similar roles based on the nature of work, skills required, and progression levels. Career bands provide an overview of the general focus, purpose of the role and level of responsibility within the organization.	**B** "Leading through Functional Performance"	Level of responsibility of the job within the organization
CAREER LEVEL	**Career Levels:** Stages of career progression that indicate the depth of experience, expertise, and leadership responsibility. We have two levels corresponding the complexity of tasks and scope of responsibility within a role – Higher and Lower Levels.	**Specialist**	Career stages that are either: 1. Lower Level, or 2. Higher Level
JOB GRADE	**Job Grades:** Hierarchical ranking that signifies the seniority of a role based on factors such as experience, skills, and contribution. Job grades are often associated with compensation structures.	**Grade 3**	Pay grade of the job
POSITION TITLES	**Position Titles:** Specific names given to roles within the organization. Position titles reflect the responsibilities, focus, and seniority of the role.	**Digital Marketing Specialist**	Business designation

UNDERSTANDING OUR JOB ARCHITECTURE

Ayala

LEADERSHIP TRACK

JOB ARCHITECTURE

CAREER BAND	CAREER LEVEL	JOB GRADE	LEADERSHIP TRACK (People Managers)	PROFESSIONAL TRACK (Individual Contributor)
F	President and CEO	12	**Visionary Leadership - "Defining Enterprise Vision"** Visionary leaders define the long-term vision and enterprise of the organization, guiding it toward innovation, growth, and long-term success.	**Technical Expertise - "Contributing Independently"** Roles in this career band are typically focused on utilizing their expertise to solve complex problems, offer expert advice, guide solutions, and mentor others to foster growth and development. Professionals often work as subject matter experts in their respective fields driving successful execution and making tangible contributions to organizational progress.
	COO	11		
E	Senior Managing Director	10	**Executive Leadership - "Shaping Organizational Direction"** Executive leaders shape the organization's direction by formulating overarching strategies, making critical decisions, and driving innovation.	
	Managing Director	9		
D	Executive Director	8	**Strategic Leadership - "Orchestrating Operational Excellence"** Those in strategic leadership roles oversee the execution of strategic initiatives, ensuring alignment with the organization's vision and driving operational excellence.	
	Associate Director	7		
C	Senior Manager	6	**Enabling Leadership: "Leading through Others"** Roles in this band are focused on leading and managing teams or departments. They require strong leadership, strategic thinking, and decision-making skills.	
	Manager	5		
B	Associate / Senior Analyst	4	**Functional Leadership: "Leading through Functional Performance"** - Individuals in technical roles apply specialized knowledge and skills to solve complex problems and drive technical excellence.	
	Specialist / Analyst	3		
A	Senior Staff	2	**Support - "Contributing through Assistance"** Roles in this level focus on providing essential support and assistance to ensure the smooth operation of various functions within the organization.	
	Staff	1		

PROFESSIONAL EXPERTISE TRACK

UNDERSTANDING OUR JOB ARCHITECTURE

CAREER BAND PROGRESSION AND EXPECTATIONS (A, B, C, D, E, F)

Qualified Zone
1 Basic

- At the basic level, individuals possess fundamental knowledge and skills related to a particular field or job role. They are typically new to the role or have minimal experience, requiring guidance to perform tasks effectively.

Advanced Zone
2 Proficient - 3 Advanced

- This level signifies a solid understanding and competence in the essential skills and knowledge required for the job. Proficient individuals can work independently, handle standard tasks, and contribute effectively to the team or organization.
- Professionals at the advanced level have a deeper understanding and experience within their field. They can tackle complex tasks, demonstrate strong problem-solving abilities, and often take on leadership roles or responsibilities within a team.

Expert Zone
4 Master, 5 Expert

- The master level denotes individuals who have achieved a high level of expertise and mastery in their domain. They possess extensive knowledge, experience, and skills, often serving as mentors or leaders in their field. Masters are capable of handling intricate challenges and providing innovative solutions.
- Experts are recognized authorities in their respective fields. They have a profound understanding of theoretical concepts, practical applications, and industry trends. Experts often contribute significantly to the advancement of their field, setting benchmarks and guiding others in complex decision-making processes and problem-solving tasks.

LOWER JOB LEVEL → **HIGHER JOB LEVEL**

CAREER PATH OPPORTUNITIES IN AC

Ayala

LEADERSHIP TRACK

Career Band	Job Grade	Corporate Resource Group							Corporates Strategy and Business Development Group		Data Analytics and Artificial Intelligence Group	Public Affairs Group			Corporate Governance Group				Finance Group									Sustainability and Risk Management Group
		Strategic Human Resources																	Treasury				Comptrollership and Asset Management					
		Total Rewards	Talent Management	Employee Engagement	Employee Support Services	Learning and Development	Knowledge Management	ICT	Corporates Strategy	Business Development and Digital Ventures		Brand and Reputation	External Affairs and Relations	Security Crisis and Management	Policies and Regulations Management	Corporate Secretarial Services	Legal Services	Internal Audit	Debt Management, Compliance and Operations	Group Treasury, Risk Transfer Strategy, and Insurance	Liquidity, Investment Management, Origination, and Sustainable Finance	Financial Risk Management, and Origination	Parent Accounting	Consolidation Accounting	Financial Planning and Analysis	Asset Management	Investor Relations	
F	12	President and CEO																										
F	11																											
E	10											Group Head, Public Affairs			Chief Legal Officer & Corporate Secretary				Chief Finance Officer									
E	9	Head, Corporate Resources Group Head, Strategic Human Resources									Managing Director, Data Analytics and Artificial Intelligence																	Chief Risk and Sustainability Officer
D	8								Head, Corporate Strategy	Head, Business Development and Digital Ventures								Chief Audit Executive	Treasurer				Comptroller					Head, Risk Management & Sustainability
D	7	Head, Total Rewards		Head, Employee Engagement						Associate Corporate Finance Director											Head, Liquidity, Investments Management, Origination, and Sustainable Finance	Head, Financial Risk Management, Origination	Parent and Consolidation Accounting Head			Head, Financial Planning & Analysis			
C	6		Head, Talent Management			Head, Learning, Organization Development and Innovation	Head, Knowledge Management	Head, IT Solutions Delivery and Governance	Senior Strategy Manager	Senior Digital Ventures Manager	Senior Analytics Manager		Senior External Affairs and Relations Manager		Senior Policies and Regulations Management Manager	Senior Corporate Secretarial Services Manager	Head, Legal Services	Senior Internal Audit Manager	Head, Debt Management, Compliance, Operations						Senior Finance Manager	Senior Asset Management Manager	Head, Investor Relations	
						Senior Innovation Manager	Senior Knowledge Management Manager			Senior Corporate Finance Manager																Asset Management Head		
C	5	Total Rewards Manager		Events Management Manager	Head, Employee Services					Corporate Finance Manager	Analytics Manager					Corporate Secretarial Services Manager	Legal Services Manager	Internal Audit Manager	Debt Management, Compliance and Operations Manager	Risk Transfer Strategy and Insurance Manager	Liquidity, Investments, Treasury Hedging and Origination Manager	Manager, Financial Risk and Origination	Finance Manager		Finance Manager		Investor Relations Manager	Risk Management Manager
																			Debt Management, Compliance and Cash Management Manager		Manager, Liquidity, Investments, ALM Analytics, Origination							Sustainability Manager
B	4		Talent Management Associate					Application Associate	Strategy Associate	Business Development Associate	Analytics Associate	Brand and Reputation Management Associate		Security and Crisis Management Associate				Internal Audit Associate					Senior Financial Analyst	Senior Financial Analyst	Senior Financial Analyst			Sustainability Associate
B	3	Total Rewards Specialist		Employee Engagement Specialist	Employee Services Specialist	Learning and Organization Development Specialist		Application Business Analyst				Specialist												Financial Analyst			Investor Relations Specialist	Risk Management Specialist
								HFM & HR Specialist				Brand and Reputation Management Specialist	External Affairs and Relations Specialist															Sustainability Specialist
								IT Infrastructure and Operations Specialist																				
A	2			Sr. Employee Engagement Staff	Senior Employee Services Staff	Senior Innovation Staff	Senior Archiver Staff	IT Helpdesk Team Staff				Senior Administrative Assistant			Executive Secretary				Administrative Assistant Senior Staff				Senior Accountant	Senior Accountant			Administrative Assistant Senior Staff	Executive Assistant
								Senior Administrative Staff																				
A	1								Administrative Assistant	Administrative Assistant					Administrative Assistant								Accountant					Administrative Assistant
2	CON			AC Sports Consultant			Knowledge Management Consultant					Head, Brand and Reputation Management Consultant		Head, Security and Crisis Management														
												Brand and Reputation Management Consultant																
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PROFESSIONAL EXPERTISE TRACK

Link to: AC Positions and Career Levels (WIP)

CURATE YOUR OWN CAREER EXPERIENCES

MOVE EVERY 2 – 3 YEARS!!!

LEADERSHIP TRACK

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		Strategic Human Resources																	Treasury				Comptrollership and Asset Management					
		Total Rewards	Talent Management	Employee Engagement	Employee Support Services	Learning and Development	Knowledge Management	ICT	Corporates Strategy	Business Development and Digital Ventures		Brand and Reputation	External Affairs and Relations	Security Crisis and Management	Policies and Regulations Management	Corporate Secretarial Services	Legal Services	Internal Audit	Debt Management, Compliance and Operations	Group Treasury, Risk Transfer Strategy, and Insurance	Liquidity, Investment Management, Origination, and Sustainable Finance	Financial Risk Management, and Origination	Parent Accounting	Consolidation Accounting	Financial Planning and Analysis	Asset Management	Investor Relations	
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A	1								Administrative Assistant	Administrative Assistant						Administrative Assistant							Accountant					Administrative Assistant
Z	CON			AC Sports Consultant			Knowledge Management Consultant					Head, Brand and Reputation Management Consultant Brand and Reputation Management Consultant		Head, Security and Crisis Management														
Y																												

SAMPLE CAREER PATH

1. **Senior Accountant**
2. **Financial Analyst**
3. **Investor Relations Specialist**
4. **Finance Manager**
5. **Asset Management Head**

PROFESSIONAL EXPERTISE TRACK

CAREER MANAGEMENT

How are employees supported in effectively navigating and developing their careers within the company? What specific resources or guidance are provided to ensure their growth and success?

STEPS TO MANAGING OWN CAREER

Career management involves several important steps that focus on building a strong foundation, utilizing accelerators, and exploring various roles. Here are the three steps:

FOUNDATION

1. Know yourself

Begin by assessing your strengths, interests, values, and skills. Understand your short-term and long-term career goals and align them with the organization's objectives.

ACCELERATORS

2. Embrace Learning

Seek out skill development programs that align with your career aspirations. Leverage experiential learning and mentorship to gain valuable skills, broaden your knowledge base, and identify areas for improvement and growth.

ROLES

3. Explore Diverse Roles

Be open to lateral moves and cross-functional transitions. Consider roles that challenge you, expose you to new experiences, and help you acquire a well-rounded skill set. Take on responsibilities that contribute to your long-term growth.

Go FAR!

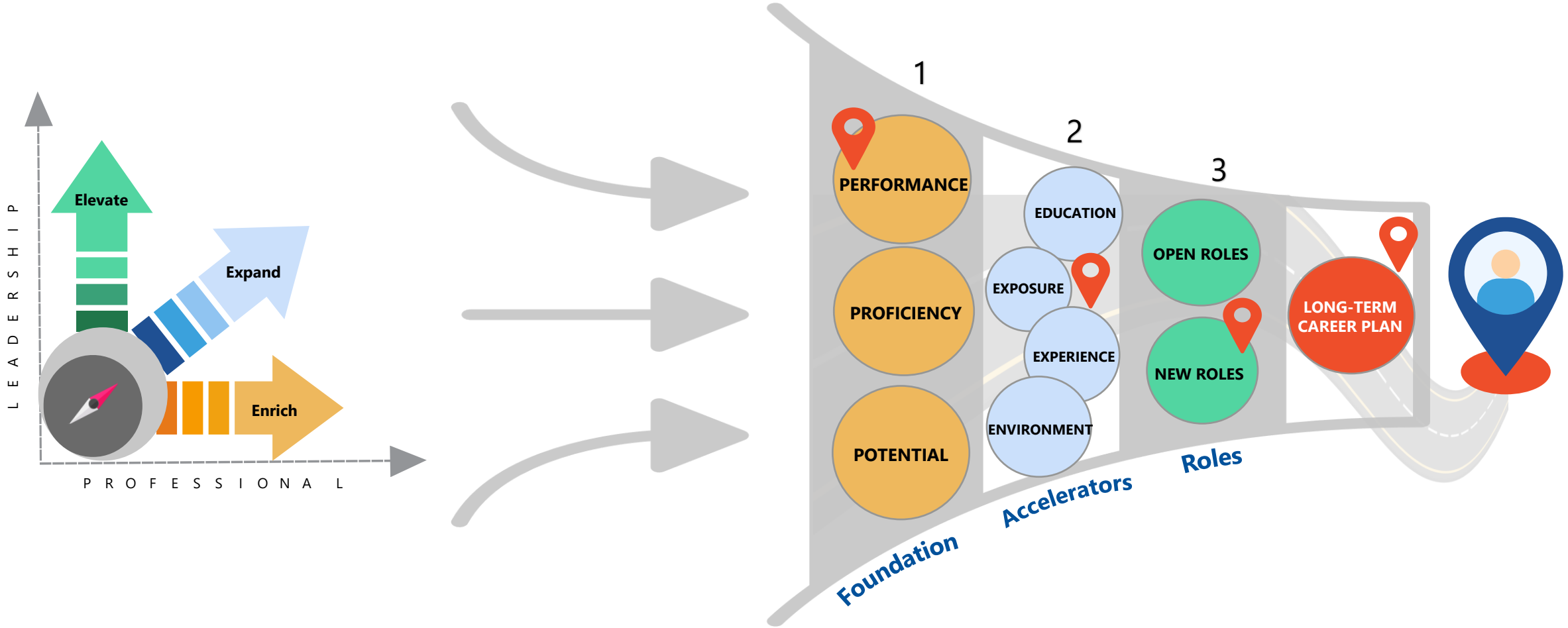
A career is a marathon, not a sprint. Approach your career emphasizing endurance over speed. Avoid unnecessary stress by refraining from setting impractical goals or timelines.

.

By focusing on these steps, you can go FAR in your career journey and make strategic choices that lead to your success.

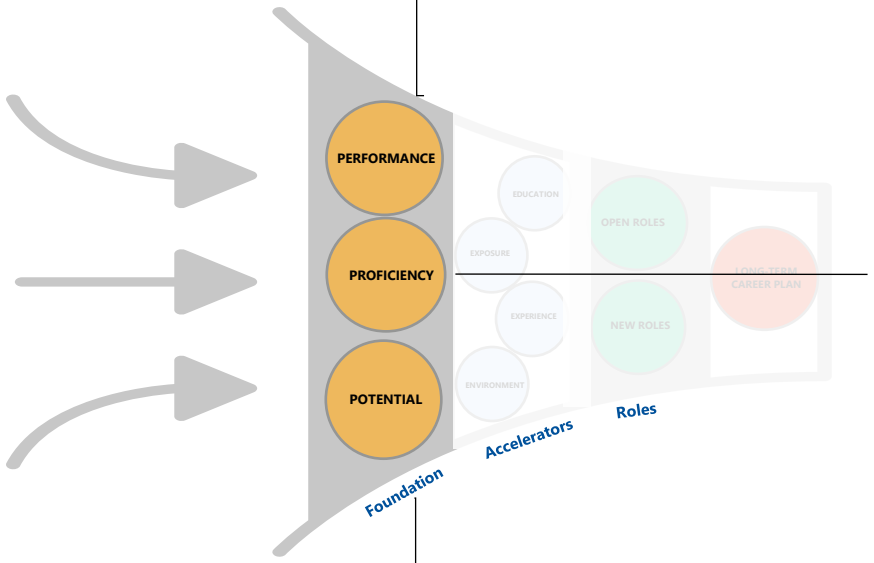
TALENT MOBILITY + CAREER MANAGEMENT FRAMEWORK

The "Growth Path System (G.P.S.)" visually outlines the factors influencing career paths and how FAR employees can progress to achieve their long-term goals.



1. FOUNDATION

Begin by assessing strengths, interests, values, and skills.



Performance

- "How have you contributed to your team's goals?"
- "How have you contributed to your Ayala's goals?"

Job Charters and KPIs

Proficiency

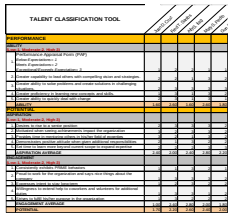
- **CORE COMPETENCIES:** "Are you equipped with essential capabilities, knowledge, and skills to deliver value in your respective field?"
- **LEADERSHIP COMPETENCIES:** "Are you equipped with specific qualities, skills, and behaviors to inspire, guide, and drive your teams and organizations towards success?"
- **FUNCTIONAL COMPETENCIES:** "Are you equipped with specific skills, knowledge, and expertise required to perform effectively and excel in your job or role?"

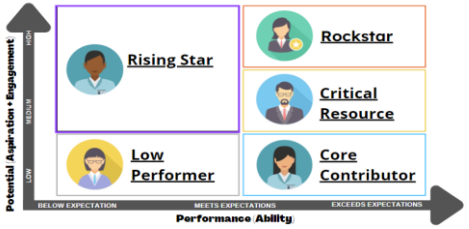
Skills Dashboard

Potential

- **ASPIRATION**: "Are you ready for a bigger accountability?"
- **ABILITY**: "Do you have the capability to succeed?"
- **ENGAGEMENT**: "How committed are you to your purpose?"

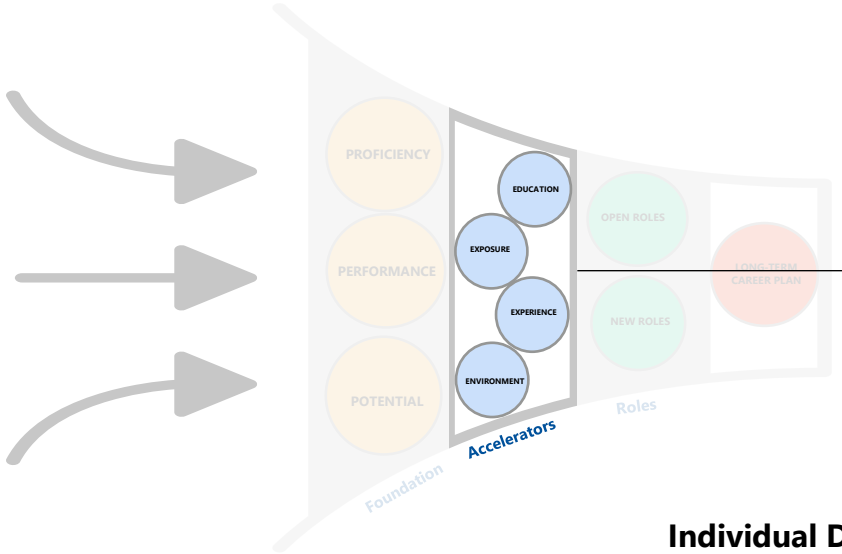
Talent Classification Tool





2. ACCELERATORS

Employees may seek out development programs that align with their career aspirations.



The Four E's of Capability Development

EDUCATION — 10%
- Training Courses
- Workshops
- Books

EXPOSURE — 20%
- Coach / Mentor
- Peer Learning
- Networking

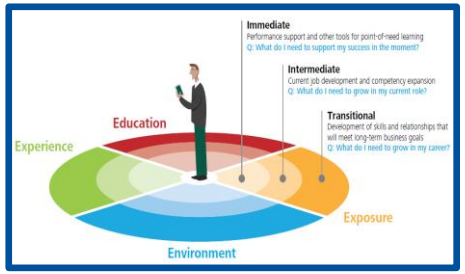
EXPERIENCE — 70%
- Job Assignments
- Immersions / Shadowing
- Secondment

ENVIRONMENT
- Tools
- Technology
- Systems

Individual Development Plans

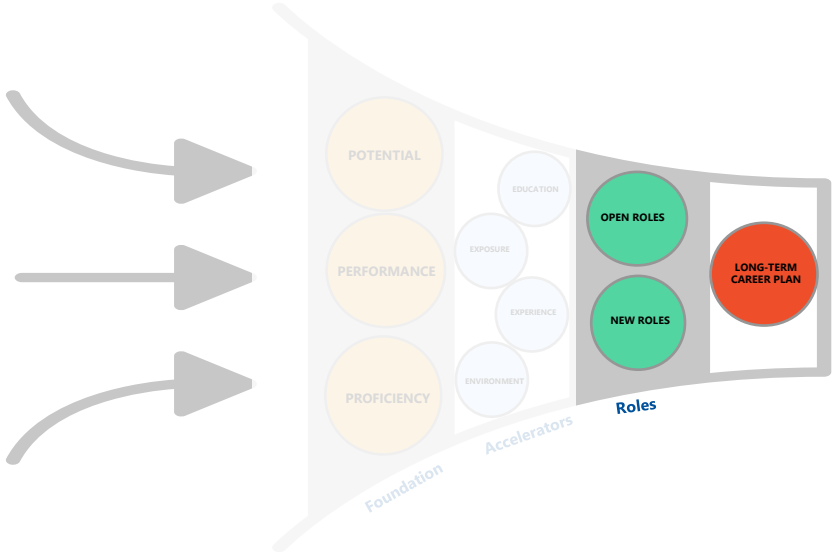
Name _____ Date: _____

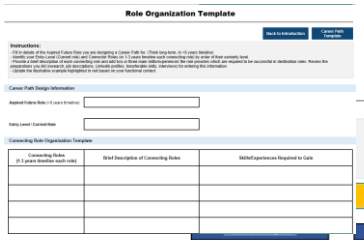
Leadership/ Technical Competency	LEARNING AND DEVELOPMENT ACTIVITIES	TIME REQUIRED	TARGET COMPLETION DATE
Customer Satisfaction			
Link to Performance Commitments			



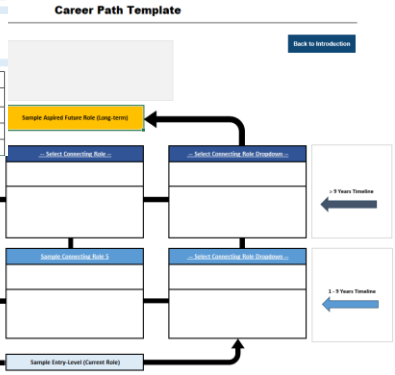
3. ROLES

Employees may be open to lateral moves and cross-functional transitions to consider challenging roles, new experiences, and acquiring a well-rounded skill set that contribute to their long-term growth.

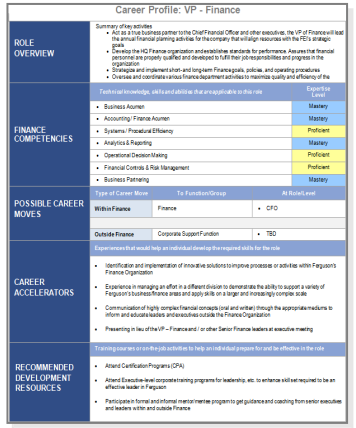




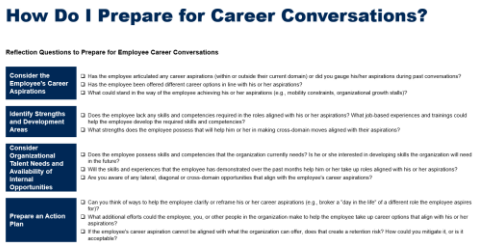
Career Tracks

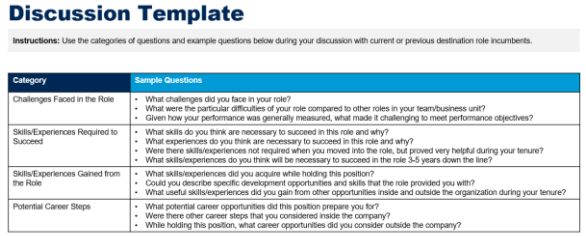


Career Profiles

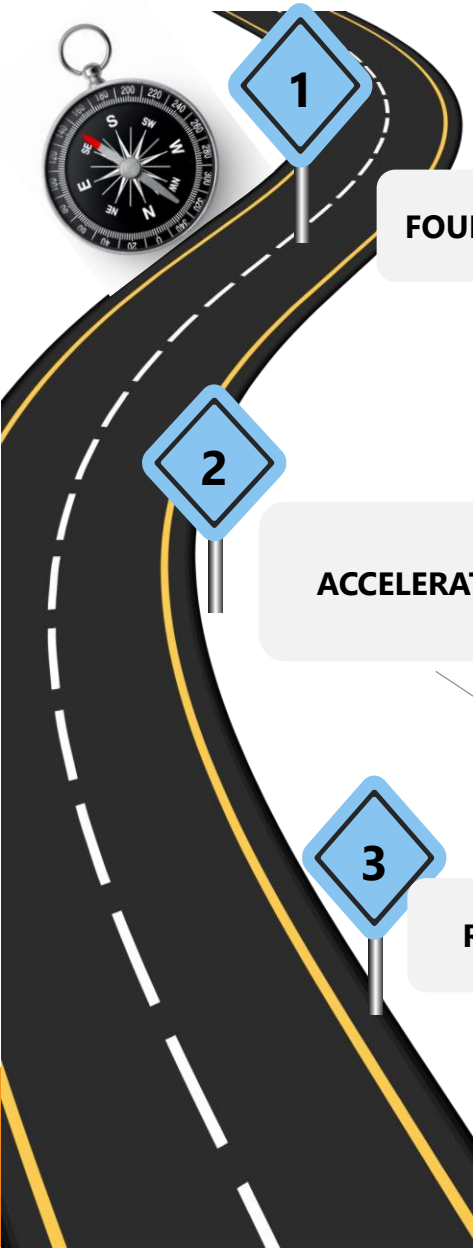


Career Conversation G.U.I.D.E.





TALENT MOBILITY + CAREER MANAGEMENT TOOLS

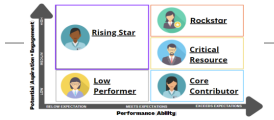


1 FOUNDATION

- **PERFORMANCE** — JOB CHARTERS & KPIS

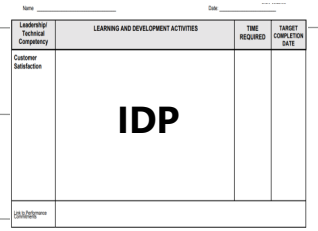
- **PROFICIENCY** — SKILLS LIBRARY

- **POTENTIAL** — TALENT CLASSIFICATION



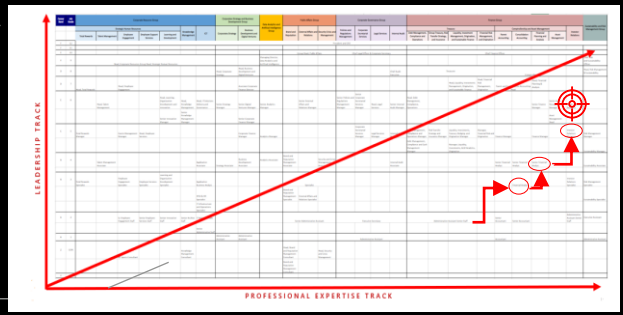
2 ACCELERATORS

- **EDUCATION** — TRAINING, WORKSHOPS, BOOKS
- **EXPOSURE** — COACHING, MENTORING, NETWORKING



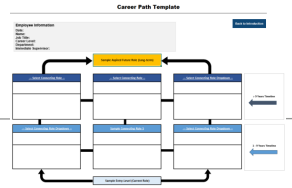
- **EXPERIENCE** — SPECIAL PROJECTS, OJT, SECONDMENT
- **ENVIRONMENT** — ONLINE TOOLS, REFERENCES, SYSTEMS

CAREER GOALS

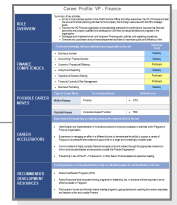


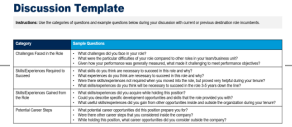
3 ROLES

- **CAREER TRACK** — CAREER ASPIRATION & PATHS



- **CAREER PROFILE**
  - TALENT PROFILE
  - CONVERSATION GUIDE





CAREER CONVERSATION G.U.I.D.E. for EMPLOYEES

CAREER CONVERSATION G.U.I.D.E.

Discussion Flow and Topics

Instructions: Use the sample flow below during a career conversation. When preparing for a career conversation, choose the topics you would like to highlight and share to your immediate supervisor.

TIP: It is highly advisable to conduct career conversations once a month (with one hour every session).

Flow	Objective	Topics
G	Gather Data	❑ Explain how your career goals evolved since your last discussion, and what steps you have taken to work towards them. ❑ Share any recent achievements or milestones related to your career goals. ❑ Share any challenges you've encountered that might be affecting your progress towards your career objectives.
U	Understand Strengths	❑ Share what you consider to be your key strengths and how have you been leveraging them in your current role. ❑ Describe a task or project that you've enjoyed working on the most recently. Include what aspects of it you found particularly fulfilling. ❑ Share what type of work environment or projects you feel you excel and contribute most effectively.
I	Identify Opportunities	❑ Identify any skills or areas of expertise you'd like to further develop to enhance your performance or broaden your responsibilities. ❑ Determine specific projects or tasks you're interested in exploring that would help you stretch your capabilities. ❑ Share what resources or support you believe would help you make the most of your growth potential in the upcoming months.
D	Develop Plans	❑ Based on our discussion, share some immediate actionable steps you would like to take to move closer to your career goals. ❑ Explain how you envision your role evolving over the next year, and what milestones could mark your progress. ❑ Outline some potential short-term (1-3 years) and long-term (3-5 years) targets that align with your career aspirations.
E	Ensure Commitment	❑ Ask how your manager can support your career development plans and objectives moving forward. ❑ Agree on the kind of regular check-ins or touchpoints would be beneficial to help you stay on track with your goals. ❑ Clarify what your manager needs to see as your next steps following this conversation, and how can you ensure a continued focus on your growth and development.

PERFORMANCE MANAGEMENT SYSTEM

How are employees supported and evaluated against the elements and standards of a performance plan?

PERFORMANCE MANAGEMENT SYSTEM (PMS)

Performance management is a process by which managers and employees work together to plan, monitor and review an employee's work objectives and overall contribution to the organization.

The performance management process provides a framework that supports our pay for performance culture and allows for equitable, transparent, and data-based reward decisions.

Drivers of Total Rewards

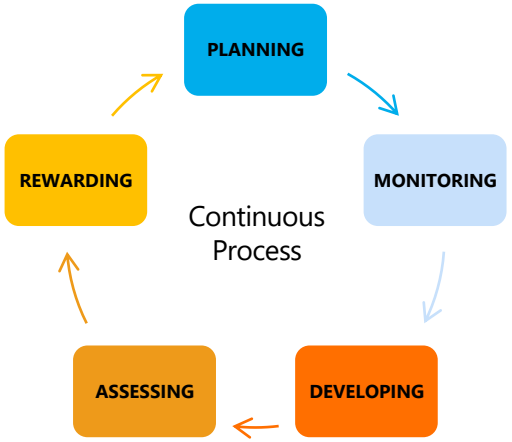
- **ORGANIZATION PERFORMANCE**
- **MARKET PRACTICE**
- **EMPLOYEE PERFORMANCE**

Compensation Decisions

PMS Objectives

- **Reward** for application of skills, delivering value, impact and overall experience
- Retain **key talent**
- Maintain **competitiveness**
- Differentiate rewards for **high vs. low performers**

PMS Cycle



PERFORMANCE MANAGEMENT MUST-HAVES

Performance Measures

- Clear Objective, Aligned, Measurable Metrics For Performance Measurement & Evaluation

Rewards & Incentive

- Individual performance incentives
- Organization-pooled performance incentives
- Other non-financial incentives (e.g., access to training for high performing individuals)
- Bonus budget allocation process

Performance Architecture

- Ongoing coaching and performance feedback
- Mid-year checkpoint and formal annual appraisal/evaluation
- Alignment to other HR related milestone such as promotion cycle and bonus payout

Performance Governance

- Number of appraiser and evaluation process accountability
- 360-degree feedback
- Performance Improvement Plan

PERFORMANCE MANAGEMENT THROUGH S.P.E.E.D.

It is imperative to adjust the performance management activities to emphasize agility, highlight individual's strengths and promote a high performing culture.

Dialogues

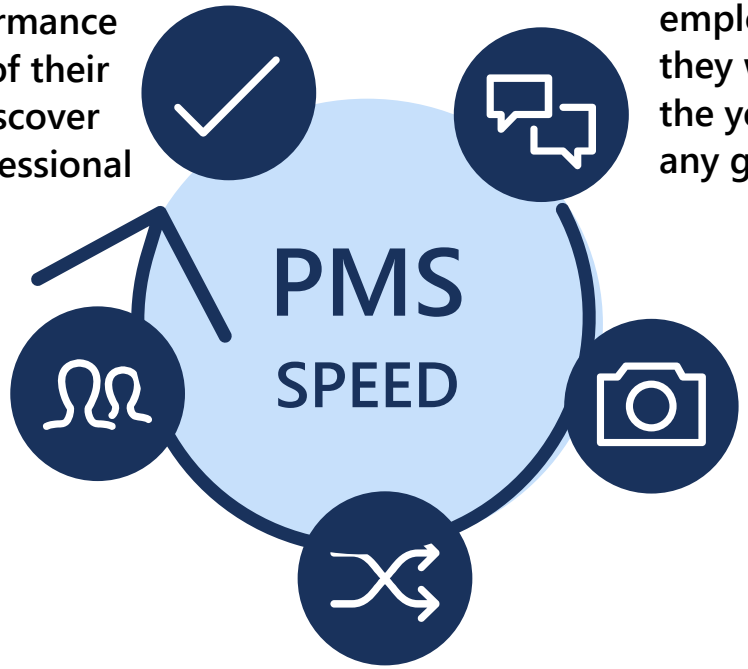
Strengthen

Regular career conversations and performance coaching to provide individuals a view of their performance and careers holistically, discover individual strengths, and advise on professional development

Snapshots

Introduce

Brief but structure feedback requested by employees in a form of survey to any supervisors they worked with across the company throughout the year to assess the employee's performance at any given time in a specific task/ work/ project.



Evaluation

Strengthen

Formal Employee Review to be used to rate employees annual performance and discuss specific talent classification and what needs to be done to develop, engage, and grow individuals within the talent pool.

Pulse Survey

Introduce

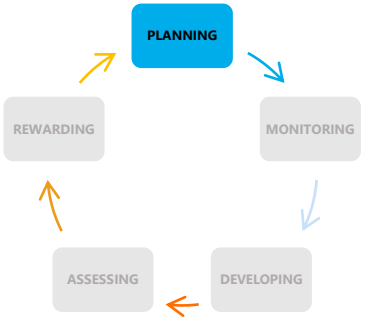
A short survey given to employees requesting for snapshots that yields insights about the employee's experience during the specific task/ work / project. This helps drive team action planning, engagement and performance. This is not used to rate the supervisor. Follow up dialogue occurs to discuss and make improvements on employee experience.

Expectations

Strengthen

Frequent, future-focused conversations between a supervisor and an individual about the work to clarify expectation and provide real-time feedback.

PERFORMANCE MANAGEMENT CYCLE



PLANNING

"Planning" means setting performance expectations and goals for groups and individuals to channel their efforts toward achieving organizational objectives. It is a collaborative effort involving both the **Immediate Supervisor** (IS) and **Employee.**

Includes the measures that will be used to determine whether expectations and goals are being met.

STEPS	ACTIVITIES
1. Align to the **Business Strategy**	• Identify how the employee's job charter should align to the organization's goals, objectives and strategic plan.
2. Review/ Update the **Job Charter**	• Determine if it reflects the work that the employee is currently doing to deliver the org and team strategy. If the employee has taken on new responsibilities or the job changed significantly, the charter should be updated. This will also serve as basis of our **Skills Inventory, Job Architecture and Strategic Workforce Planning.**
3. Set **Clear Goals**	• Specify the goals and tasks that need to be accomplished. • Set measurable targets. • Develop and agree on clear measures, state when one is "Fully Meets Standard" , etc. • Identify weight of each tasks or goals. • Outline specific timeframe .
4. Document **Agreement.**	• Sign off by approving the job charter and the objectives set for the year. • Load Approved Goals in **PeopleScore**

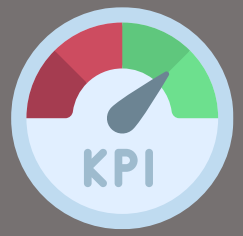
From Goals to KPIs the #AC Way

WHAT IS A GOAL?

A broad, overarching outcome that an individual or organization aims to achieve.
Example: Enhance overall workforce effectiveness within Ayala Corporation.

WHAT IS A KEY RESULT AREA (KRA)?

Specific areas or domains critical to the achievement of goals. They represent the main functions or responsibilities of an individual or a department.
Example: Develop and implement talent acquisition strategies to ensure a continuous pipeline of candidates.



WHAT IS A KEY PERFORMANCE INDICATOR (KPI)?

Measurable criteria that indicate the level of success in achieving KRAs or goals. KPIs provide quantifiable benchmarks for performance evaluation.
Example: Increase the percentage of successful hires by 15% within the next quarter.

PERFORMANCE MANAGEMENT CYCLE – GOAL SETTING LINE OF SIGHT

What we aim to achieve:

We aim to create a high-performing organization through setting up a customized, goal-driven performance management system to identify and reward our best talent.

- Create transparency and alignment behind company-wide strategy
- Provide a direct link between individual and company goals.
- Reinforce what high performance looks like at AC

PERFORMANCE MANAGEMENT CYCLE – GOAL SETTING LINE OF SIGHT

Ayala

Ayala Corporation

Value-add: Expected of a HoldCo…

1 Active Portfolio Management

- Ensure strategic direction of BUs aligns with our outlook
- Drive performance metrics & synergies
- Portfolio recommendations or realizations

2 Strategic Business Development

- Exploring new or concentric industries
- Build and grow strategic partnerships and relationships

3 Human Capital Management

- Source of talent and leadership for our companies

4 Center of Excellence

- Brand building
- Regulatory and Public Affairs
- Driving aspects of our culture and group capabilities (evolve over time: Innovation, Analytics, Sustainability)

…Ayala choice to push this agenda

1 Active Portfolio Management

PUREFOODS · Liveit · iPEOPLE

2 Strategic Business Development

Globe · MANILA WATER (CARE IN EVERY DROP) · ACEN · AC Health (An Ayala Company) · AC Logistics (An Ayala Company)

3 Human Capital Management

AYALA LEAP (LEADERSHIP ACCELERATION PROGRAM) · HARVARD BUSINESS SCHOOL Executive Education · wbcsd

4 Center of Excellence

AYALA INNOVATION · AC Analytics · Ayala Sustainability

PERFORMANCE MANAGEMENT CYCLE – ORG KRAs

	WEIGHTS		2023 TARGETS	SCORE
Focused Execution	**70%**	**20%**	Reported net income target of P30bn	**XX**
		10%	Outperform Philippine conglomerates' average 3YR TSR	**XX**
		10%	Ensure achievement of Logistics and Health targets	**XX**
		10%	Launch EV entity and secure critical partners	**XX**
		10%	Maintain healthy levels of Cash Adequacy (CAR, Net Gearing, and LTV)	**XX**
		10%	Execution of key portfolio moves and value realization initiatives	**XX**
Leadership in Sustainability	**10%**	**10%**	**Drive leadership in sustainability in the Philippines** ▪ Completion of the climate ambition roadmap for all core business units (South Pole) ▪ Completion of a social pillar roadmap with clear targets set by year-end	**XX**
Transformation	**10%**	**10%**	**Solidify our reputation as employer of choice** ▪ Senior officer transition & enhancement of career development plans	**XX**
	10%	**10%**	**Deliver on critical transformation initiatives of our business units, through our various centers of excellence** (e.g. analytics, brand, public policy, internal audit, legal, etc.)	**XX**

FINAL 2023 SCORE	XX

PERFORMANCE MANAGEMENT CYCLE – SMART GOALS

IDENTIFY TEAM INTERDEPENDENCIES

Identify dependencies early on to determine level of accountability and establish healthy partnerships.

INTRA-TEAM DEPENDENCIES

Internal Dynamics of a Specific Team

What do you need from others on the team to succeed?

INTER-TEAM DEPENDENCIES

Collaboration & Synergy Required Across Various Teams

Does the achievement of your goals require collaboration with or contributions from someone else's team?

EXTENT OF COMMITMENT

Is there commitment to the contribution?

SET S.M.A.R.T. GOALS

S	SPECIFIC	to the responsibilities of the department/team
M	MEASURABLE	and objective
A	ACHIEVABLE	but stretched
R	RELEVANT	to the business directions
T	TIME-BOUND	within Q4 of 2023

PERFORMANCE MANAGEMENT CYCLE – CREATING A GOAL STATEMENT

Verb

Definite targets

Exponentially increase revenue by X% within the next Y years through diversifying customer base and developing new revenue streams.

Approach

PERFORMANCE MANAGEMENT CYCLE – CREATING A GOAL STATEMENT

Verb

Approach

Design and implement a digital communication program to communicate organizational strategies, engage team members, and achieve a target average evaluation score of 3/4 or above by 2023.

Definite targets

PERFORMANCE MANAGEMENT CYCLE – SETTING PERFORMANCE MEASURES

Quality	Quantity	Timeliness
The degree of excellence of outputs	The amount or number of work completed	The practice of finishing work earlier or at an agreed deadline
No data errors	**1 Progress Report**	**Weekly Report every Friday**

PERFORMANCE MANAGEMENT CYCLE – SAMPLE GOAL STATEMENT

BD / SALES

Strong verb

Definite targets

Exponentially increase revenue by X% within the next Y years through diversifying customer base and developing new revenue streams.

Approach

KPI: SALES GROWTH

HOW TO MEASURE: The percentage of net sales from one period to another.

KPI: GROSS PROFIT MARGIN

HOW TO MEASURE: Gross profit divided by net sales (percentage of total sales revenues generated).

KPI: NET PROFIT MARGIN

HOW TO MEASURE: The percentage of revenue remaining after operating expenses, interest and taxes have been deducted.

PERFORMANCE MANAGEMENT CYCLE – SAMPLE GOAL STATEMENT

IT

Strong verb

Definite targets

Efficiently reduce mean time to resolve high-severity information incidents by X% by streamlining escalation procedures.

Approach

KPI:
MEAN TIME TO RECOVERY

HOW TO MEASURE:

The percentage of net sales from one period to another

KPI:
MEAN TIME TO REPAIR

HOW TO MEASURE:

The average time it takes to repair and test a system.

KPI:
MEAN TIME BETWEEN FAILURES

HOW TO MEASURE:

The average time between repairable failures

PERFORMANCE MANAGEMENT CYCLE – SAMPLE GOAL STATEMENT

Sustainability

Strong verb

Definite targets

Identify and implement a sustainability strategy directly contributing to 9-10 out of 17 UN SDGs by aligning initiatives to overall business direction.

Approach

KPI: CORPORATE GOVERNANCE MANAGEMENT

HOW TO MEASURE:

The percentage of policies and procedures created and cascaded for sustainability

KPI: SUSTAINABILITY REPORTING

HOW TO MEASURE:

Quality and on time disclosure of annual sustainability report measured through its adherence to accepted global reporting framework standards

KPI: SUSTAINABILITY STRATEGY

HOW TO MEASURE:

Quality, on time identification and percentage of direct contribution to the UN SDGs of the sustainability strategy for the AC

Considerations in Determining Weights

1. Impact to the set business goals
2. Financial effect to the org or department
3. Relevance to the nature of business or actual work
4. Complexity of task (highly technical tasks, effort given, time allocated)

"Weigh What Matters"

PERFORMANCE MANAGEMENT CYCLE – KRA SCORING

- **Distinguish above average performance from truly exceptional accomplishment**; 3 = a good score
- A **more "subjective" approach can be used** for certain quantitative metrics, and for the qualitative benchmarks
- **Managers will still determine and weight their own KRAs**; standardization only applies to how we measure

PERFORMANCE MANAGEMENT CYCLE – KRA SCORING

"3.0" is a score that captures the rigorous standards of AC.

1. All talents managed by unit heads will have to **set goals/targets** that will **reflect a score of a 3.0 that fully meets the standards of AC.**
2. **Talents** will only have to **define what a score of a 3.0** is.

Scoring system and timeline

Scoring system

1 — *Underperformer*

2 — *Some deficiencies*

3 — *Fully meets the rigorous AC standards*

(Maximum score for self-rating is a 3.0)

Stretched targets/goals

A talent can score more than a 3.0, determined by both the group and unit head, and this will be calibrated within the group, and across groups in a Holdings ManCom meeting

Timeline

Q1

Talents will define what merits a 3.0.

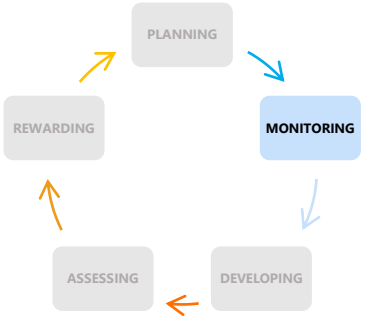
Submit 2023 worksheets with definitions of 3 to Unit Head and Group Head

Q4

From the baseline score of 3.0, group and unit heads will discuss if the talent deserves a score below or above a 3.0.

By December, all individuals should have an indicative score for 2023, and start setting their 2024 KRAs. These will be finalized by end of January.

PERFORMANCE MANAGEMENT CYCLE



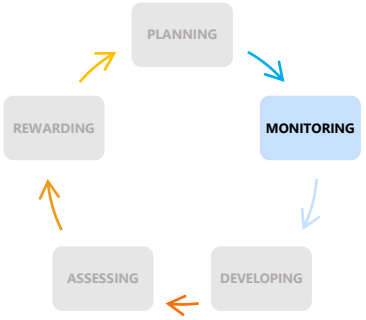
MONITORING

"**Monitoring**" means consistently measuring performance and providing ongoing feedback to employees on their progress toward reaching their goals.

Includes monitor results (what) and behaviors (how) to determine how far/ close the employee is from accomplishing the defined targets.

STEPS	ACTIVITIES
1. Assess **Progress**	• Assess progress towards meeting performance objectives using the agreed targets set at the start of the year. This activity is ideally done **at least once a month** through **"Coaching and Mentoring".** • **Coaching** focuses on specific skill development and performance improvement through structured, short-term sessions, while **Mentoring** aims at long-term career development, offering informal, sustained guidance and insights.
2. Identify **Barriers**	• Identify any barriers and performance gaps that may prevent the employee from accomplishing performance objectives and what needs to be done to overcome them.
3. Share **Feedback**	• Share constructive feedback on progress and gaps relative to the goals.
4. Plan **Changes**	• Identify any changes that may be required to the work plan as a result of a shift in organization priorities or if the employee is required to take on new responsibilities. Include behavioral attributes as well.
5. Extend **Support**	• Determine if any support is required from the IS or others to assist the employee in achieving objectives. • Input plans in the **Individual Development Plan** of the employee for continuous monitoring and developmental support. • Use a **Performance Improvement Plan**, if necessary,

PERFORMANCE MANAGEMENT CYCLE



MONITORING → **Data Gathering**

Reactive data

- The data comes to you

Examples

- Revenue analysis
- Feedback
- Hotline reports
- Tickets resolved
- Warranty claims
- Web site hit-rate

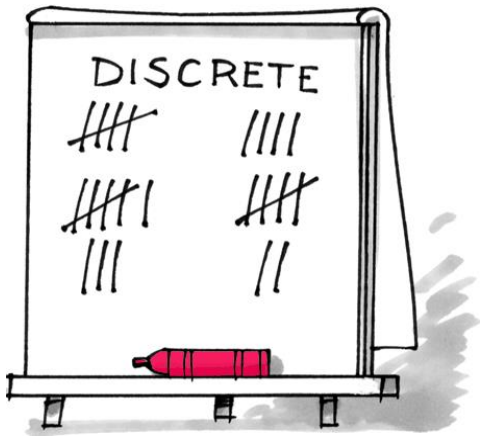
Proactive data

- You've got to go to get the data

Examples

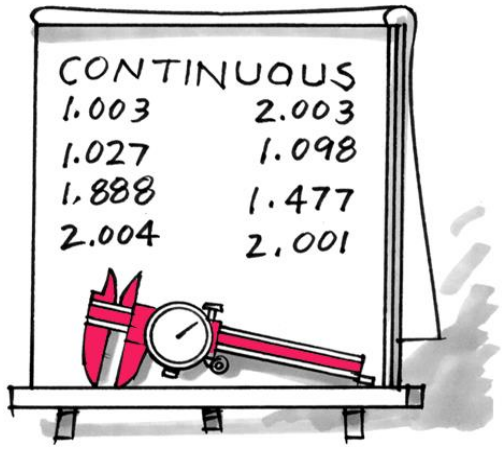
- Comment/registration cards
- Interviews, focus groups
- Gemba visits
- Market research
- Benchmarking

Two Kinds of Data that you must be able to distinguish…



Discrete data

consists of distinct and separate values. These values are often counted and are typically whole numbers, representing individual and separate entities.



Continuous data

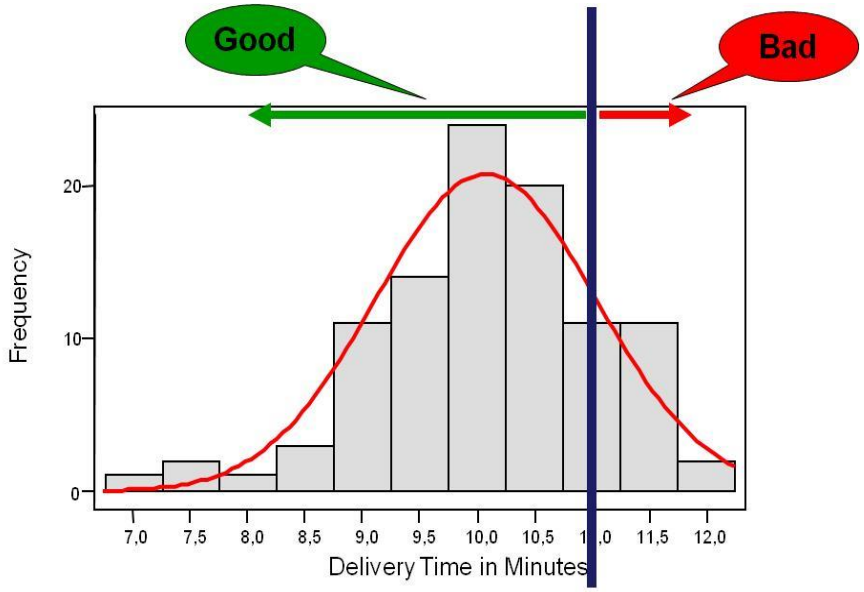
represents measurements along a continuous scale. It can take any value within a range and is often associated with measurements that can be fractionated.

Example: The number of completed training sessions by employees in a specific period. This data is counted in whole numbers, and each training session is a distinct entity.

Example: The average time spent on a task by employees. This data is continuous because it can take any value within a range, and it is not limited to whole numbers.

Data Specifications

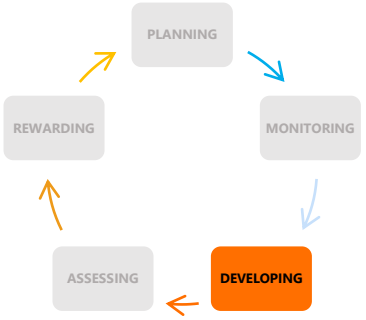
The **Upper Specification Limit** is the maximum acceptable value for a particular metric or performance indicator.



USL
(Upper Specification Limit)

- **Setting Standards:** Defining the maximum acceptable level of performance for a metric.
- **Monitoring Performance:** Comparing actual performance against the USL to identify deviations.
- **Identifying Issues:** Quickly spotting outliers and anomalies that exceed the upper limit.
- **Continuous Improvement:** Using USL to drive ongoing performance enhancement.
- **Quality Control and Risk Management:** Managing and mitigating risks associated with performance deviations.
- **Feedback and Goal Alignment:** Communicating the USL to align individual and team goals with organizational standards.

PERFORMANCE MANAGEMENT CYCLE



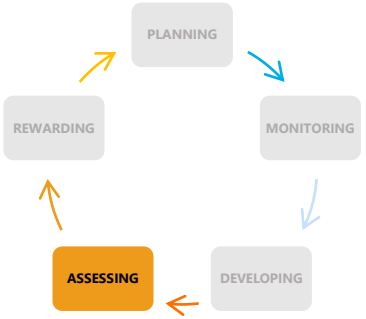
DEVELOPING

"Developing" - increasing the capacity to perform through training, giving assignments that introduce new skills or higher level of responsibility, improving work processes, or other methods.

Development efforts can encourage and strengthen good performance and help employees keep up with changes in the workplace.

STEPS	ACTIVITIES
1. Conduct **Skills Assessment**	• Identify individual and team skill gaps through assessments and performance evaluations. • Input plans in the **Individual Development Plan** of the employee for continuous support
2. Targeted **Training** Initiatives	• Enroll employees on programs addressing identified skill gaps, ensuring relevance and effectiveness. • You may maximize **LinkedIn Learning** as our platform to learn about diverse topics.
3. Assign **Experiential** Tasks	• Provide assignments that introduce new skills or higher responsibilities to encourage continuous learning and growth.
4. Streamline **Work Processes**	• Identify and improve work processes, eliminating inefficiencies and leveraging technology for enhanced productivity. You may use the **Capacity Calculator** if bandwidth is the challenge.
5. Establish **Regular Feedback Mechanism and Loop**	• Implement a robust feedback system within your team to provide constructive input, enabling individuals to refine their skills and enhance performance. • Establish a feedback loop to share Lessons Learned with relevant stakeholders, teams, and decision-makers involved in similar projects or activities.

PERFORMANCE MANAGEMENT CYCLE



ASSESSING

"**Assessing**" means evaluating employee against the elements and standards in an employee's performance plan, summarizing that performance, and assigning a rating / value of record.

STEPS	ACTIVITIES
1. Gather **Performance Data**	• Summarize the work accomplished during the previous year relative to the goals that were set and agreed upon at the beginning of the performance period. • Include capturing the key results, accomplishments and possible reasons for shortfalls for each of the objectives. • It is ideal to have a formal mid-year assessment to plan if goals need to be adjusted for any unforeseen circumstances or risk mitigation.
2. Analyze **Root Causes**	• Dig deeper into the root causes of challenges and failures to identify underlying issues and contributing factors.
3. Capture **Lessons Learnt**	• Document challenges and root causes encountered during the year to enhance future performance by leveraging insights gained from past experiences.
4. Streamline **Work Processes**	• Integrate the identified lessons into existing processes, policies, or procedures to prevent the recurrence of issues and to enhance future decision-making.

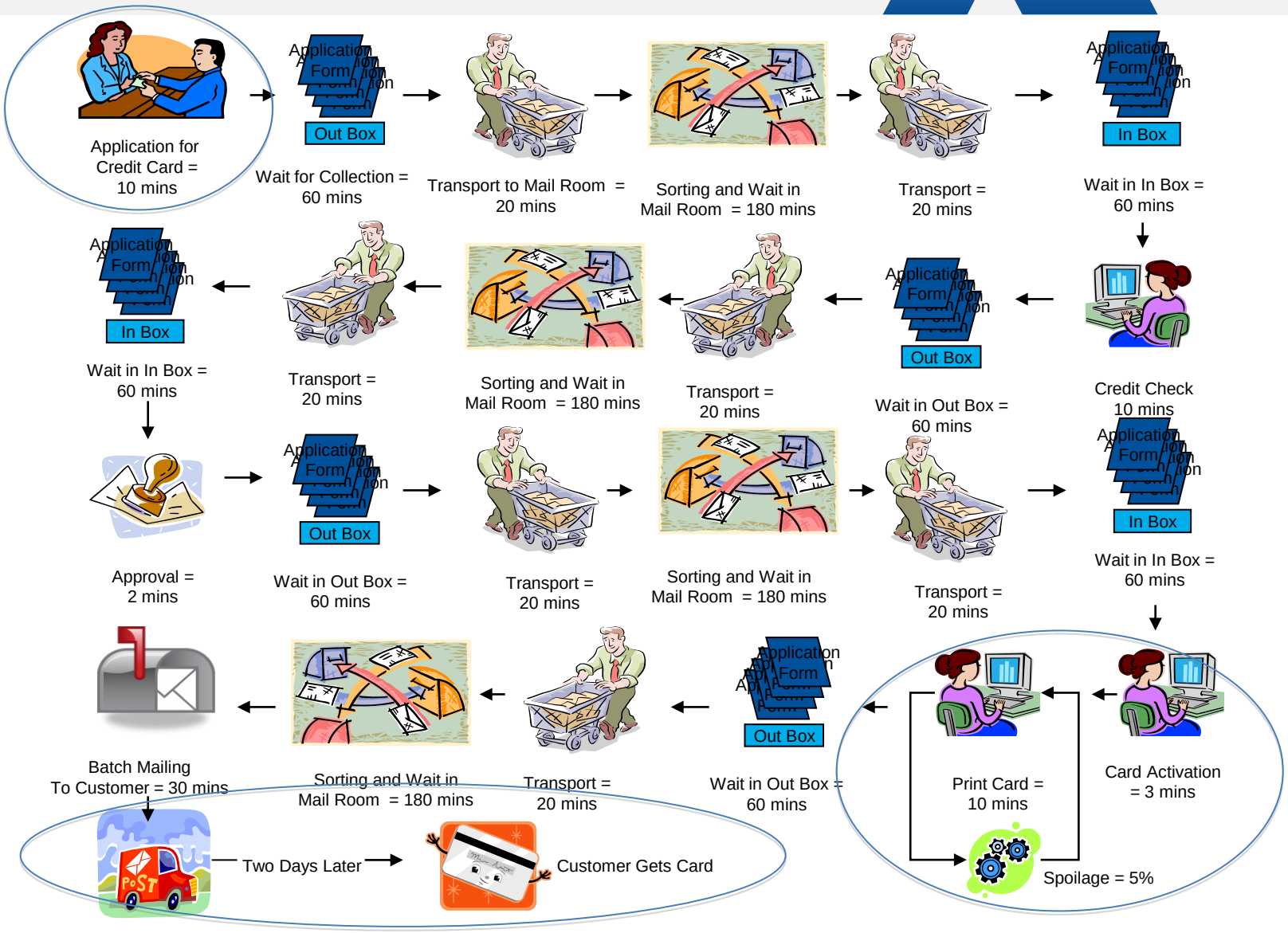
Value and Non-Value Adding Activities

Whether an activity is value adding to your goals depends on how the stakeholders sees it

	Value Adding Activities	Necessary but Non- Value Adding	Non-Value Adding
What is it?	Activities core to the product or service or process that the stakeholders want	Activities that do not add value from stakeholder's perspective but is required by the business	Activities that do not add value from stakeholder's perspective and is not willing to pay for/ engage with
How to see it?	Is the Product or Service or Process Transformed by this activity? Does it add a feature, function or form to the product or service that the customer is willing to pay for?	Does this activity: 1. Reduce Identified Risk? 2. Comply with some regulation? 3. Comply with some internal control? 4. Does anything bad happen if we remove this step?	1. Does this activity create a known type of waste? 2. Is the customer willing to pay for it / stakeholder willing to engage with it 3. Is it a re-work or corrective action?
Action Mode	Increase the Quality of activities related to your goals	Try to separate this activity from your main goals so that your goals are not impacted by the time it consumes	Reduce and ultimately eliminate it

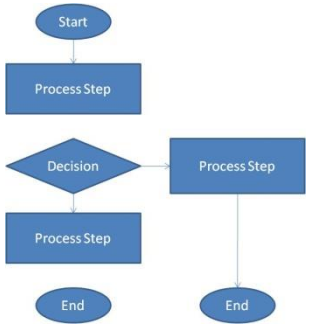
PERFORMANCE MANAGEMENT CYCLE - ASSESSING

Which activities are value-adding?

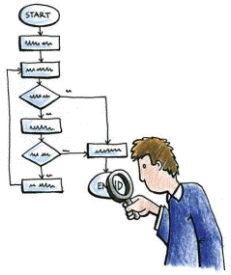


Two Schools of Thought about Process Analysis

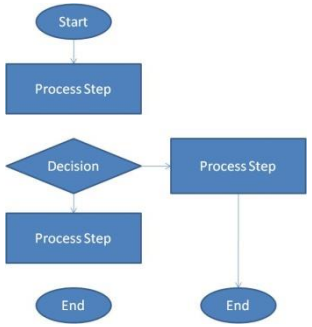
As-Is Approach



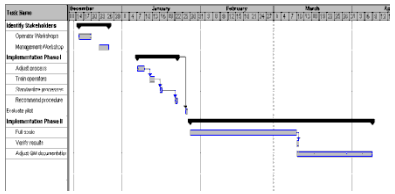
Map the As-Is Process



Find out what needs to be changed / Improved on



Map the To-Be Process

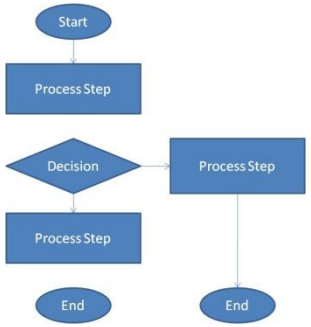


Implement the Changes

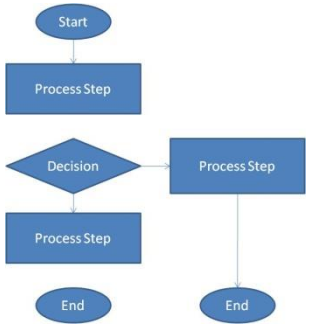
Clean Slate Approach

"What Good Looks Like"

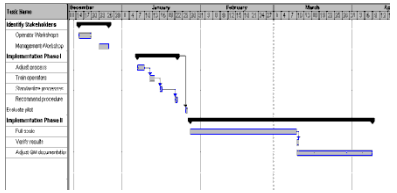
Gather the Requirements



Map the Should Be Process (Ignore the As-Is)

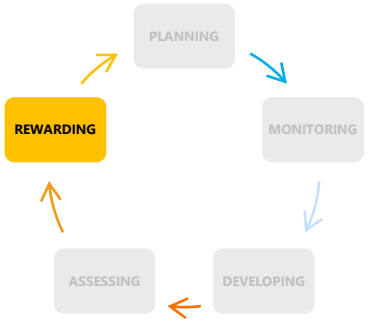


Map the As-Is Process



Create a Transition Plan from As-Is to Should Be and implement

PERFORMANCE MANAGEMENT CYCLE



REWARDING

"**Rewarding**" refers to the process of recognizing and compensating employees for their contributions, achievements, and overall performance. Rewards can take various forms, including financial incentives, non-monetary recognition, career development opportunities, and other benefits. The goal is to motivate and retain high-performing employees, align their efforts with organizational objectives, and reinforce a positive and performance-driven culture.

STEPS	ACTIVITIES
1. Identify **High Performers**	• Identify employees who have consistently exceeded expectations and demonstrated exceptional performance during the evaluation period.
2. Choose **Appropriate Rewards**	• No one size fits all approach. Tailor rewards to individual preferences and needs. Some employees may value financial incentives, while others may prefer opportunities for career growth or work-life balance.
3. Timely **Recognition**	• Provide timely recognition and rewards to employees. Delays in acknowledging and rewarding exceptional performance can diminish the impact of the incentive.
4. Continuous **Performance Feedback**	• Accompany rewards with constructive performance feedback. Highlight specific achievements and behaviors that led to the reward, reinforcing desired behaviors.
5. Normalize **PEP Talks in Performance Dialogues**	• P – Praise the Positive • E - Empathize • P – Plan How to Level Up

PROMOTION GUIDELINES

PROMOTION

Promotion General Guidelines:

- A promotion is a career opportunity for an employee involving additional roles & responsibilities, higher competency, proficiency and/or skill set, and a larger sphere of influence. It refers to the upward movement of employees within the company for a new higher job role, tasks, and responsibilities.
- Employees are promoted when they have successfully taken on a wider scope of responsibility and have demonstrated their ability to perform at the next career level.
- Promotions shall happen once a year only during appraisals. (April announcement and retro January)
- Any employee nominated for promotion during appraisal shall be mandatorily evaluated on the criteria below.
- In case of one or more recommendation at the same position, employee with a higher qualification shall always be considered.

CRITERIA	DESCRIPTION
Performance History	• Two (2) years in the role; last date of promotion is no less than two (2) years. Two (2) years in a position/level is not an automatic trigger for promotion. • Performance ratings in the past show an increasing/improving trend i.e., Performance history of at least 3 out of 5 (Fully Meets Standards/ Meets Expectations). • Has contributed to the increased productivity of his/her department, or project. • No rating of Needs Improvement for the past two (2) years. The employee should not be currently enrolled in the Performance Improvement Program (PIP). • No disciplinary record in the last two (2) years, no on-going incidents, case within the company.
Next Role Description	• Next role aligned to the AC Standard Career Level Expectations (i.e. Leading through Functional Performance, Leading through Others, Orchestrating Operational Excellence, Shaping Organizational Direction, Defining Enterprise Vision) ❑ Job Content and Scale (breadth and depth) ❑ Job Complexity ❑ Autonomy and Scope
Competency Level	• Demonstrated competencies for the next level via: ❑ Assumption of an expanded job scope ❑ Improvement in the Core and Leadership Proficiency level ❑ Solid performance in the expanded job scope

PROMOTION – CHOOSING FUNCTIONAL REPRESENTATIVES (FR)

Selecting appropriate functional representatives for promotion deliberations is crucial for ensuring a well-rounded and informed evaluation process. Here are some considerations to guide you in choosing functional representatives:

No.	Group/Unit	Pop	# of FR
1	Corporate Strategy and Business Development	13	1
2	Corporate Governance	30	2
3	Data Analytics and Ai	6	1
4	Public Affairs	13	1
5	Sustainability and Risk	11	1
6	Corporate Resources	38	2
7	Finance	40	2

1. Seniority and Experience: Opt for representatives with a level of seniority and experience that reflects a deep understanding or exposure to the most of the functional domains in the organization. Their years of experience should contribute to a comprehensive evaluation.

2. Objectivity and Impartiality: Ensure that functional representatives can maintain objectivity and impartiality throughout the evaluation process. Individuals who can assess candidates based on merit, performance, and potential without personal bias are ideal.

3. Leadership Qualities: Look for representatives who exhibit strong leadership qualities within their functional area. Their ability to assess leadership potential in others is valuable for identifying candidates ready for higher roles.

4. Communication Skills: Choose representatives with effective communication skills. They should be able to articulate their observations and evaluations clearly during deliberations and provide constructive feedback.

5. Understanding of Organizational Goals: Select representatives who have a clear understanding of the broader organizational goals and how the functional area contributes to achieving those goals. This ensures alignment with the company's overall strategy.

6. Team Collaboration Experience: Individuals who have experience collaborating with other functional areas and fostering cross-functional teamwork can provide insights into how well a candidate may integrate into a higher role that requires collaboration.

7. Past Involvement in Talent Management Initiatives: Consider representatives who have been involved in talent development initiatives or have a track record of nurturing and developing individuals within their functional teams.

8. Advocacy to Company Values and Diversity and Inclusion: Ensure that the chosen representatives embody and promote the company's values. Their commitment to ethical conduct and adherence to organizational principles contribute to a fair and just evaluation process. Encourage representation from diverse backgrounds and perspectives to foster inclusivity in the promotion process. This helps in mitigating biases and promoting a fair evaluation of candidates.

PROMOTION –FUNCTIONAL REPRESENTATIVES (FR) ROLES

In the context of promotion deliberations, functional representatives play pivotal roles as evaluators, contributing unique perspectives and insights to ensure a comprehensive and fair assessment of candidates. The critical roles of functional representatives in this process include:

1. Subject Matter Expertise: Utilizing their in-depth knowledge of the specific functions or departments, functional representatives provide valuable insights into the technical and operational competencies required for success in higher roles.

2. Performance Evaluation: Assessing the candidate's performance against key performance indicators (KPIs) and objectives within their functional area, ensuring alignment with organizational goals and standards.

3. Competency Evaluation: Evaluating the candidate's competencies, skills, and proficiency in the functional domain, providing a nuanced understanding of how well the individual meets the technical requirements of the higher role.

4. Cultural Fit and Collaboration: Examining the candidate's ability to collaborate and integrate within the organizational culture, assessing how well they contribute to cross-functional teams and promote a collaborative working environment.

5. Leadership Potential: Identifying and evaluating leadership potential within the functional context, including the ability to inspire, guide, and lead teams effectively toward achieving departmental objectives.

6. Strategic Alignment: Ensuring that the candidate's career aspirations and development goals align with the strategic objectives of both their functional area and the broader organization.

7. Feedback Provision: Offering constructive feedback on the candidate's strengths, areas for improvement, and potential developmental opportunities, contributing to the individual's growth and readiness for the higher role.

8. Risk Assessment: Assessing any potential risks or challenges associated with promoting the candidate, including how well they can handle increased responsibilities and adapt to changes within the functional context.

9. Advocacy for Diversity and Inclusion: Promoting diversity and inclusion by considering candidates from underrepresented groups within their functional area, contributing to a more inclusive and equitable promotion process.

10. Collaboration with HR: Collaborating with SHR to ensure that the promotion process aligns with organizational policies, procedures, and legal requirements.

PROMOTION

10 Step Promotion Process ➢ Annual Cycle - Announcement on April; Retroactive January 1 of the year

IS/ Unit Head

1. Accomplish the Promotion Nomination Form and nominate 5 evaluators.

Group Head

2. Review, approve or deny the nominations under his/her team.

3. Endorse the recommendation forms to SHR - Talent Management (TM)

SHR – Talent Management

4. Get list of 1-2 nominated Functional Representatives of each Group Heads for F2F deliberation.

5. Review eligibility and consolidate written feedback from the 5 nominated evaluators of IS & Group Heads

6. Present Promotion Recommendation Summary and secure approval of CHRO to proceed to L1 deliberations stage.

DELIBERATIONS

L1 Functional Reps

(Sr. Staff up to Manager)

7. Provide critical incidents as case for promotion during deliberation day. Inputs will be recorded as data for next level endorsement.

L2 Group Heads

(Sr. Staff up to Managing Director)

8. Approve or Deny Promotions based on level, feedback and presented cases.

Inputs will be recorded as data for next level endorsement.

L3 Holdings Mancom

(Sr. Staff up to Sr. Managing Director)

9. Approve or Deny Promotions based on level, feedback and presented cases.

L4 Board NomComm

(Managing Director and Up)

10. Approve or Deny Promotions based on level, feedback and presented cases.

Promotion Announcement

PROMOTION DELIBERATION & APPROVAL MATRIX

- **Functional Representatives (FR)** - composed of selected one-downs of the Group Heads. The number of representatives per group is determined based on the headcount of the groups; Convenes and deliberates for Levels 2-5
- **Group Heads** – Heads of Departments; Nominates FRs; Approves FR's recommendations for Levels 2-5
- **Promotion Board**
  - **Holdings ManCom** - Promotions Board composed of the Holdings Management Committee (ManCom).
  - **Corporate Governance & Nomination Committee** – Composed of Selected Board Members

Promotion to	L 1 Functional Representatives	L2 Group Heads	Promotion Board	
			L3 Holdings ManCom	L4 Corp Gov & Nomination Committee
Level 2 - 5 (Sr. Staff up to Manager)	✓	✓	✓	✗
Level 6 - 8 (Sr. Manager to Executive Director)	✗	✓	✓	✗
Level 9 (Managing Director)	✗	✓	✓	✓
Level 10 (Senior Managing Director)	✗	✗	✓	✓

PERFORMANCE IMPROVEMENT PLAN (PIP)

PERFORMANCE IMPROVEMENT PLAN (PIP)

A Performance Improvement Plan (PIP) is a document that helps employees understand their skills, identifies gaps, and sets clear expectations for job roles.

Each PIP is unique to the needs of an employee. It identifies and lists gaps as well as the action steps that will lead directly to improvements aligned with job roles and expectations. This is not a one-size-fits-all approach and should be created with input from managers/ immediate supervisors, the employees themselves, and HR.

BENEFITS OF PIP:

- ✓ **Growth Mindset Culture:** PIPs support a culture of continuous learning and improvement.
- ✓ **Skill-Performance Alignment:** Identify gaps between employee skills, performance, and job roles.
- ✓ **Clear Path for Improvement:** Provide employees a clear path to enhance work quality, set goals, and meet growth targets.
- ✓ **Positive Culture Promotion:** Prevent negative connotations by using PIPs proactively for improvement, not just for failures.
- ✓ **Employee Empowerment:** Employees embrace PIPs when part of a culture empowering them to take control of their improvement.
- ✓ **Productivity and Happiness:** Recognizing employee value and setting clear expectations enhances productivity and employee happiness.
- ✓ **Purpose-Driven Work:** Supports purpose-driven work, community building, and deeper relationships.
- ✓ **Turnaround Opportunity:** Effectively implemented PIPs offer an opportunity to turn around performance issues through targeted action plans.

PERFORMANCE IMPROVEMENT PLAN (PIP)

WHEN TO IMPLEMENT A PIP?

- ✓ **Addressing Poor Performance:** Addressing poor performance is a common managerial challenge, requiring a plan of action for improvement.
  - ✓ Employee's performance is affecting colleagues' performance and attitudes.
  - ✓ Employee's performance significantly changed or consistently missed targets.
- ✓ **Addressing Employee's Lack of Role Clarity:** A PIP is valuable when an employee lacks clarity about their job or expectations, or when additional support can enhance their contribution.
- ✓ **Targeting Improvements:** The focus of a PIP is to pinpoint areas for improvement while recognizing and reinforcing areas where the employee excels.

WHEN TO AVOID A PIP?

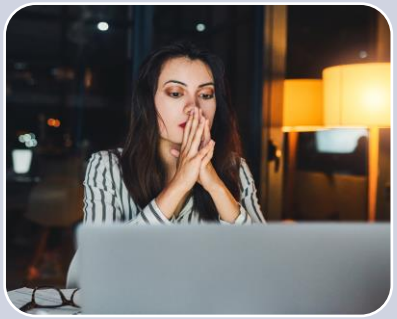
- X **Misuse as Termination Tool:** If PIPs are perceived as tools for termination, it creates fear and hinders genuine performance improvement.
- X **Personal Issues Between Employees and Managers:** PIPs are not remedies for personal issues; effective collaboration requires mutual respect between managers and employees.
- X **Personality Misalignments:** PIPs can address misalignments by facilitating transitions, but may not be suitable for broader organizational shifts.
- X **Competency Misalignment with Organizational Changes**: PIPs may not benefit employees when competencies are misaligned with new job requirements due to organizational shifts.
- X **Serious Incidents:** Avoid using PIPs for serious incidents like theft, violence, or gross insubordination; other measures are more appropriate.

PERFORMANCE IMPROVEMENT PLAN (PIP)

WHAT TO EXPECT IN A PIP?

Time and Effort: PIPs ideally last 12 weeks, providing time for training, mentorship, and corrective actions. Early completion is possible if goals are achieved sooner.

Documentation & Customization: Not one-size-fits-all; each PIP is individually designed with specific outcomes, requiring effort for effectiveness. Everything should be documented.



Workflow Distraction: While PIPs may disrupt regular workflow, long-term gains in productivity from performance correction and role alignment can be significant.

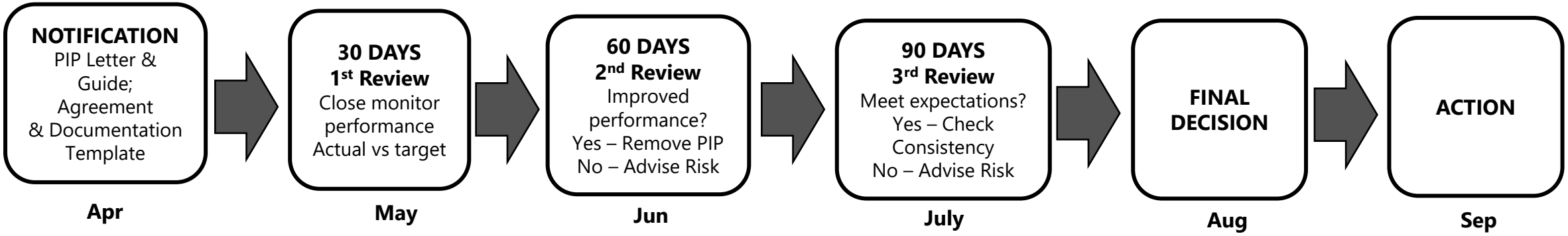
Uncomfortable Conversations: HR's role is crucial in setting clear positive expectations for PIPs and providing tools for uncomfortable performance conversations.

Negative Perception: PIPs may be perceived negatively, potentially seen as a precursor to termination. Framing PIPs within a culture of self-improvement influences

PERFORMANCE IMPROVEMENT PLAN (PIP)

Implementation of Performance Improvement Plan is designed to help employees performing **"Below Expectations"/ "Some Deficiencies" / "Deficient"** to get back on track by improving their performance up to the expected level

HIGH LEVEL PERFORMANCE IMPROVEMENT PLAN PROCESS



Sample Timeline Only
(PIP can happen any time of the year.)

PERFORMANCE IMPROVEMENT PLAN (PIP)

PIP Template: First Check-In (Within last week of the first 30 days)

PERFORMANCE IMPROVEMENT PLAN

PARTICIPANTS

Employee Name		Employee Career L	
Manager/Supervisor Name		Employee No.	
Department			
Review Period			

CHECKPOINT 1: SETTING PERFORMANCE IMPROVEMENT GOALS & ACTIVITIES

Date of Discussion	

PIP Discussion Acknowledged by:

Signature of Employee

Signature of Direct Manager/Supervisor

AREAS NCERN

In ist down specific areas of concern you have identified during the participant's most n nce evaluations.

4

5

OBSERVATIONS, PREVIOUS DISCUSSIONS, OR COACHING CONDUCTED

Instructions: Document previous coaching sessions, discussions conducted with the employee, and observations with specific dates and months.

IMPROVEMENT GOALS, ACTIVITIES, AND TARGETS

Instructions: For each area of concern, list down improvement goals and corresponding activities, measures of success, start date, and projected completion date.

Improvement Goals	Improvement Activity	Measures of Success	Start Date	Projected Completion Date
1				
2				
3				
4				
5				

PERFORMANCE IMPROVEMENT PLAN (PIP)

PIP Template: 30th and 60th Day Check-Ins (Within last weeks of the 30 and 60 days in PIP)

CHECKPOINT 2: 30th DAY PROGRESS REVIEW

Dates covered:

PIP Discussion Acknowledged by:

Signature of Employee

Signature of Direct Manager/Supervisor

ESS CHECKPOINT

ions: Document progress notes for each Improvement Goals and Activity.

	Improvement Goals	Improvement Activit	Measures of Success	Progress Notes
1				
2				
3				
4				
5				

OTHER NOTES (i.e., Agreements made during coaching sessions, etc.)

CHECKPOINT 3: 60th DAY PROGRESS REVIEW

Dates covered:

PIP Discussion Acknowledged by:

Signature of Employee

Signature of Direct Manager / Supervisor

S CHECKPOINT

s: Document progress notes for each Improvement Goals and Activity.

	Improvement Goals	Improvement Activit	Measures of Success	Progress Notes
1				
2				
3				
4				
5				

OTHER NOTES (i.e., Agreements made during coaching sessions, etc.)

PIP Template: 90th Day and Final Recommendations (Within last week of the 90 days in PIP)

CHECKPOINT 4: 90th DAY PROGRESS REVIEW & RESULTS

Dates covered:

PIP Discussion Acknowledged by:

Signature of Employee / Date

Signature of Direct Manager / Supervisor / Date

PROG CKPOINT

A cument progress notes for each Improvement Goals and Activity.

	Improvement Goals	Improvement Activi	Measures of Success	Progress Notes
3				
4				
5				

OTHER NOTES

PIP RESULTS & FINAL RECOMMENDATIONS

☐ PASS ☐ FAIL ☐ EXTEND

SIGNATORIES

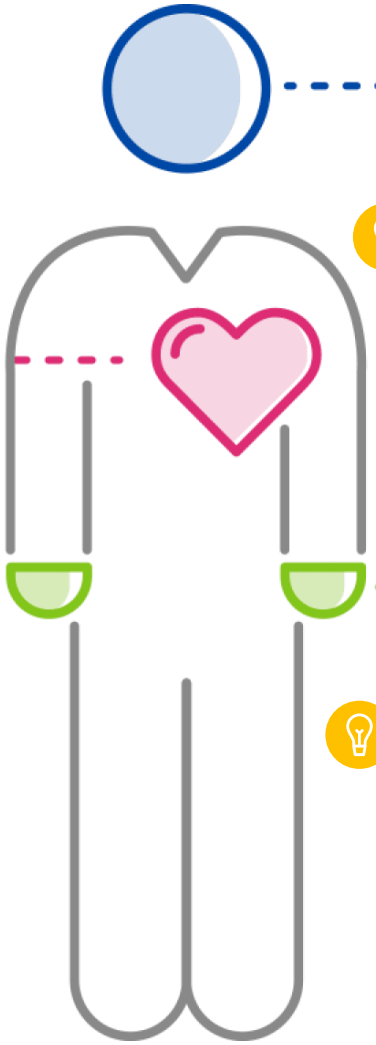
Signature of Employee / Date

Signature of Manager / Date

Signature of Group Head / Date

CAPABILITY DEVELOPMENT

CORE COMPETENCIES



Head
Knowledge & Skills

BUSINESS ACUMEN
Encompasses the ability to comprehend and interpret complex business environments, making informed decisions that drive strategic success.

TECHNICAL KNOWLEDGE/ FUNCTIONAL EXPERTISE
Involves possessing specialized skills and deep understanding within a specific domain, enabling proficient problem-solving and innovation.

PROBLEM SOLVING & DECISION MAKING
Entails analyzing situations, identifying solutions, and making informed choices that address challenges and contribute to organizational advancement.

Heart
EQ & Communication

LEADERSHIP
Ability to guide, inspire, and empower individuals or teams towards achieving shared goals and driving organizational excellence.

STAKEHOLDER & QUALITY FOCUS
Involves understanding diverse stakeholder needs, expectations, and delivering exceptional results that align with organizational goals and uphold high standards.

COMMUNICATION
Entails effectively transmitting and receiving information through various channels, ensuring clarity, active listening, and engagement with audiences.

Hands
Delivery

TEAMWORK
Ability to collaborate, communicate, and contribute effectively within diverse groups, fostering synergy to achieve shared objectives.

INNOVATION & CHANGE MGT
Involves driving creative thinking, adapting to evolving environments, and leading successful transitions that enhance organizational progress.

RESULTS ORIENTATION
Commitment to achieving measurable outcomes, setting and exceeding goals, and consistently delivering value to drive organizational success.

LEADERSHIP COMPETENCIES

LONG-TERM PERSPECTIVE and VISIONING	❑ Displays foresight, anticipates factors and emerging trends that will affect business decisions. ❑ Demonstrates the ability to understand the outcomes of a business decision and creates a clear and compelling desired state. ❑ Articulates value proposition for one's unit that supports and aligns with company vision and strategy.
PLANNING	❑ Formulates effective strategies consistent with the business that will support long-term and short-term goals. ❑ Has strategic capacity to sift through a wide range of information to focus that organization on the critical priorities. ❑ Establishes goals, sets priorities and allocates resources to activities that support these goals.
INNOVATION and GROWTH ORIENTATION	❑ Pushes breakthrough thinking by creating an environment conducive for idea generation where people can experiment and take risks. ❑ Challenges conventional ways of thinking to pursue new initiatives to support business growth. ❑ Sets up the appropriate systems and structures to support innovation and creativity.
DECISION MAKING	❑ Makes the best business decisions based on available information in a timely manner. ❑ Balances risk-taking versus risk aversion. ❑ Anticipates possible scenarios and outcomes of business decisions and risks.
MARKET/INDUSTRY KNOWLEDGE and INFLUENCE	❑ Promotes brand leadership/value proposition to the market/industry. Takes action to enhance the company's reputation among stakeholders. ❑ Embodies the company's values and is a respected representative of the company and his area of expertise. ❑ Takes an active role in shaping the industry and/or function using market intelligence. ❑ Is fully aware of current realities and situations where he can exercise leadership and formulates an appropriate response to client and market needs.
PARTNERSHIP BUILDING and NETWORKING	❑ Forges mutually beneficial business endeavours and relations that produce better solutions, through collaboration and consensus. ❑ Provides strategic direction on partnerships that the organization should be pursuing.
SOCIAL RESPONSIBILITY	❑ Promotes social responsibility and contributes to nation building. ❑ Ensures that the organization is held in trust for a greater purpose, the good of society. ❑ Considers the external impact of business activities and decisions on customers, market/industry, investors, media, government and communities.
LINE OF SIGHT/ ALIGNMENT	❑ Translates strategy as shared aspirations into specific goals and actions for his team. ❑ Identifies, mobilizes and influences key stakeholders to achieve these goals. ❑ Establishes clear decision rights to ensure that decisions are made with speed and accuracy based on the best available information.
RESOURCE MANAGEMENT and ACCOUNTABILITY	❑ Manages resource tradeoffs and shifts resources as needed. ❑ Establishes priorities and assigns corresponding accountabilities to maximize business results. ❑ Institutionalizes and strengthens systems that allow others to achieve desired results and commitments.
PROCESS DISCIPLINE	❑ Ensures that activities are well-planned and correspond with project objectives. ❑ Monitors activities and makes sure that they are followed according to plan. ❑ Measures the effectiveness of methods used and adjusts these as necessary. ❑ Continuously improves process to eliminate waste and rework.
INTELLIGENT RISK-TAKING	❑ Takes calculated risks and manages these effectively. ❑ Ensures an environment of risk awareness at all levels. ❑ Develops risk mitigation plans.
CHANGE MANAGEMENT	❑ Recognizes and champions changes as needed, and effectively manages both the areas that remain stable and those that are changing. ❑ Foresees the impact of changes, develops systems, and integrates these within organizational processes. ❑ Communicates to stakeholders affected by changes and addresses their concerns and questions to encourage buy-in and compliance.
ORGANIZATIONAL CAPABILITY BUILDING	❑ Designs an organization and implements a structure appropriate to the business needs and strategies, when applicable. Puts the right people in the right roles in order to achieve desired results. ❑ Identifies future competencies and expertise required by the organization and develops and pursues learning and/or hiring plans accordingly. ❑ Instills a sense of shared accountability and common purpose and facilitates collaboration within and across organizations.
PERFORMANCE MANAGEMENT	❑ Establishes high standards of performance, accountability, and teamwork to achieve desired results. ❑ Empowers other; shows confidence in employees' ability to be successful and delegates appropriate responsibility and authority. ❑ Fosters an environment where contributions are valued. Celebrates accomplishments and milestones of the members or team.
PEOPLE DEVELOPMENT	❑ Leverages on strengths and addresses areas of improvement of team members. ❑ Provides members the opportunity to practice and develop leadership skills. ❑ Mentors team members. ❑ Supports career development plans and opportunities for team members. ❑ Consistently promotes and supports continuous learning and improvement and sharing of best practices throughout the organization.
RESPECT FOR DIVERSITY	❑ Promotes an environment that recognizes and harnesses diversity in expertise, competencies and backgrounds. ❑ Unifies and resolves differences in ideas and opinions.
ACCOUNTABILITY and TRANSPARENCY	❑ Takes responsibility for decisions, actions and results. ❑ Ensures that the rationale behind decisions and actions is clear to everyone involved. ❑ Delivers on commitments to stakeholders. ❑ Balances the interests of the customer, team and organization and does what is best, as and when appropriate.
PROFESSIONALISM and INTEGRITY	❑ Creates a culture that fosters high standards of ethics by demonstrating personal credibility and practicing corporate values. ❑ Has good work ethic, e.g. comes to meetings on time and prepares, meets deadlines, complies with code of conduct, etc. ❑ Delivers on commitments to stakeholders. ❑ Adheres to standards applicable to the practice of one's profession.
RESILIENCE	❑ Stays focused on business priorities and delivers despite difficulties and changes in the operating environment. ❑ Displays persistence and tenacity, when appropriate. ❑ Manages ambiguities, change and new information and adapts behaviour and work methods in response to these.
COMMUNICATION and INFLUENCE	❑ Expresses ideas clearly, directly and completely. ❑ Disseminates important information when and where appropriate. ❑ Inspires others to achieve more than what is expected.
SELF-MASTERY	❑ Recognizes and leverages one's strengths and works on improving areas of weaknesses. ❑ Continuously seeks feedback to know one's self better.
PASSION	❑ Demonstrates enthusiasm and commitment for what he/she does and believes. ❑ Creates excitement and inspires others to excel.
MULTI-TASKING	❑ Handles multiple roles and responsibilities with the same high quality output.

COMPETENCY GAP ASSESSMENT – INDIVIDUAL REPORT

Using the Skills Framework, we will conduct an assessment to determine gaps and training needs. All employees will undergo a self-assessment of their current skills. Furthermore, line managers will also be assessing their direct reports as a form of calibration.

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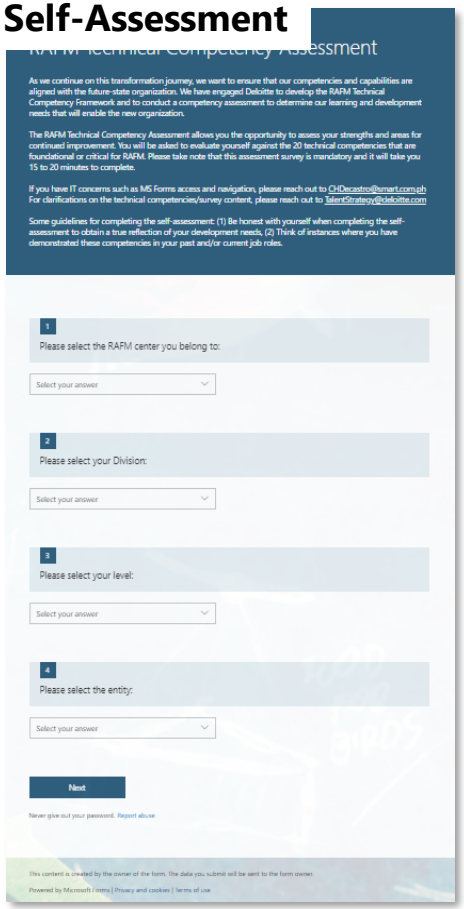
Self-Assessment



RAFM Technical Competency Assessment

As we continue on this transformation journey, we want to ensure that our competencies and capabilities are aligned with the future-state organization. We have engaged Deloitte to develop the RAFM Technical Competency Framework and to conduct a competency assessment to determine our learning and development needs that will enable the new organization.

The RAFM Technical Competency Assessment allows you the opportunity to assess your strengths and areas for continued improvement. You will be asked to evaluate yourself against the 20 technical competencies that are foundational or critical for RAFM. Please take note that this assessment survey is mandatory and it will take you 15 to 20 minutes to complete.

If you have IT concerns such as MS Forms access and navigation, please reach out to CHDecastro@smart.com.ph
For clarifications on the technical competencies/survey content, please reach out to TalentStrategy@deloitte.com

Some guidelines for completing the self-assessment: (1) Be honest with yourself when completing the self-assessment to obtain a true reflection of your development needs, (2) Think of instances where you have demonstrated these competencies in your past and/or current job roles.

1 Please select the RAFM center you belong to:

Select your answer

2 Please select your Division:

Select your answer

3 Please select your level:

Select your answer

4 Please select the entity:

Select your answer

Next

Never give out your password. Report abuse

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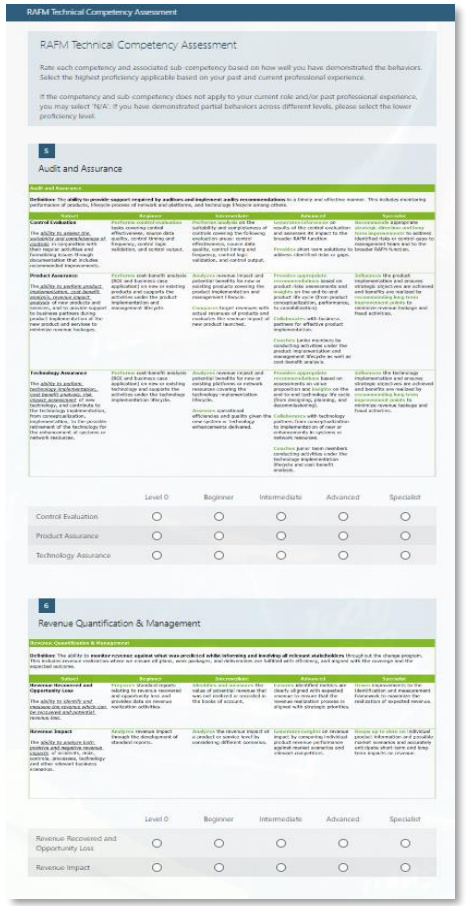


RAFM Technical Competency Assessment

RAFM Technical Competency Assessment

Rate each competency and associated sub-competency based on how well you have demonstrated the behaviors. Select the highest proficiency applicable based on your past and current professional experience.

If the competency and sub-competency does not apply to your current role and/or past professional experience, you may select 'N/A'. If you have demonstrated partial behaviors across different levels, please select the lower proficiency level.

5 Audit and Assurance

Audit and Assurance

Definition: The ability to provide support required by auditors and implement audits recommendations in a timely and effective manner. This includes monitoring performance of products, lifecycle process of network and platforms, and technology lifecycle among others.

Competency	Beginner	Intermediate	Advanced	Specialist
Control Evaluation The ability to assess the suitability and consistency of controls in conjunction with business units, and to ensure formulating issues through documentation that includes recommended improvements.	Performs initial evaluation tests reviewing control effectiveness, source data quality, control timing and frequency, control logic validation, and control output.	Performs the initial suitability and consistency of controls covering the following evaluation areas: control effectiveness, source data quality, control timing and frequency, control logic validation, and control output.	Independently or results of this control evaluation and assessment its impact to the broader RAFM function. Provides short term solutions to address identified risks or gaps.	Innovates with appropriate strategies and long term improvements to address identified risks or control gaps to management teams and to the broader RAFM function.
Product Assurance The ability to perform product implementation cost benefit analysis, analysis of product impact on network and platforms and services, and to provide support to business partners during product launches, and for the new product and revisions to minimize revenue leakages.	Performs cost-benefit analysis (ROI and business case application) on new or existing products covering the activities under the product implementation and management lifecycle.	Analyzes revenue impact and potential benefits for new or existing products covering the product implementation and management lifecycle. Compares target revenues with actual revenues of products and evaluates the revenue impact of new product launches.	Provides appropriate recommendations based on product-risks assessments and analysis of impact to the product life cycle (from product conceptualization, performance, to sunset/retire). Collaborates with business partners for effective product implementation. Coaches junior team members by conducting activities under the product implementation and management lifecycle as well as cost benefit analysis.	Influences the product implementation and ensures strategic objectives are achieved through the product lifecycle by recommending long term improvement points to minimize revenue leakage and fraud activities.
Technology Assurance The ability to perform technology cost-benefit analysis, root cause analysis, risk impact assessment of new technology, and contribute to the technology implementation, testing, and support implementation, to the possible retirement of the technology for the enhancement of systems or network resources.	Performs cost-benefit analysis (ROI and business case application) on new or existing technology covering the activities under the technology implementation lifecycle.	Analyzes revenue impact and potential benefits for new or existing platforms or network resources covering the technology implementation lifecycle. Provides operational efficiencies and quality given the new systems or technology enhancements delivered.	Provides appropriate recommendations based on assessments on value propositions, risks, and impact on the end to end value chain (from designing, planning, and documentation). Collaborates with technology partners from conceptualization to implementation of new or enhancements to systems or network resources. Coaches junior team members conducting activities under the technology implementation lifecycle and cost benefit analysis.	Influences the technology implementation and ensures strategic objectives are achieved through the technology lifecycle by recommending long term improvement points to minimize revenue leakage and fraud activities.

	Level 0	Beginner	Intermediate	Advanced	Specialist
Control Evaluation	○	○	○	○	○
Product Assurance	○	○	○	○	○
Technology Assurance	○	○	○	○	○

6 Revenue Quantification & Management

Revenue Quantification & Management

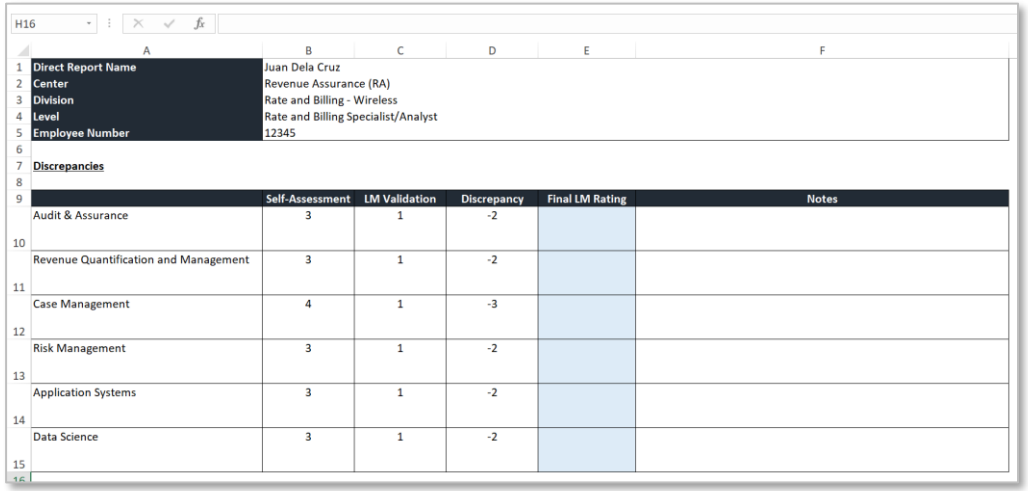
Definition: The ability to monitor revenues against what was predicted while informing and involving all relevant stakeholders throughout the change program. This includes revenue realizations which are ensure all plans, work packages, and deliverables are fulfilled with efficiency, and aligned with the coverage and the expected outcomes.

Competency	Beginner	Intermediate	Advanced	Specialist
Revenue Recovered and Opportunity Loss The ability to identify and measure the revenue which can be recovered and potential revenue loss.	Performs standard reports relating to revenue recovered and opportunity loss and provides data on revenue realization activities.	Identifies and measures the value of potential revenue that can be recovered and/or is in the books of account.	Executes identified metrics and clearly aligned with expected revenue impact and drives the revenue realization process to aligned with strategic priorities.	Drives improvements to the identification and measurement of revenue recovered and realization of expected revenue.
Revenue Impact The ability to analyze both positive and negative revenue impacts from new products, services, processes, technology and other relevant business scenarios.	Analyzes revenue impact through the development of standard reports.	Analyzes the revenue impact of a product or service level by considering different scenarios.	Generates insights on revenue impact by comparing individual product revenue performance against market scenarios and relevant competitors.	Scopes up to date and individual product information and possible market scenarios and accurately anticipate short term and long term impacts on revenue.

	Level 0	Beginner	Intermediate	Advanced	Specialist
Revenue Recovered and Opportunity Loss	○	○	○	○	○
Revenue Impact	○	○	○	○	○

Line Manager Calibration

Manager attends calibration briefing → Manager schedules time with Direct Report → Manager conducts calibration discussion → Manager completes the calibration form → Manager sends completed form to Talent team



H16

	A	B	C	D	E	F
1	Direct Report Name	Juan Dela Cruz				
2	Center	Revenue Assurance (RA)				
3	Division	Rate and Billing - Wireless				
4	Level	Rate and Billing Specialist/Analyst				
5	Employee Number	12345				
6						
7	Discrepancies					
8						
9		Self-Assessment	LM Validation	Discrepancy	Final LM Rating	Notes
10	Audit & Assurance	3	1	-2		
11	Revenue Quantification and Management	3	1	-2		
12	Case Management	4	1	-3		
13	Risk Management	3	1	-2		
14	Application Systems	3	1	-2		
15	Data Science	3	1	-2		
16						

COMPETENCY GAP ASSESSMENT – INDIVIDUAL REPORT

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HOW TO NAVIGATE THE FILE

There are 3 main components to the individual assessment report:

(1) Summary of Competency Proficiency
(2) Comparison of Self Assessment Rating and Line Manager Rating by Subcompetency
(3) Mapping of Readiness for RAFM roles based on Line Manager Assessment and Target Proficiency

SAMPLE ONLY

*Toggle the filter to the **employee number** corresponding to the individual whose results you want to view **(All 3 filters must contain the same value, filters will turn RED if values are inconsistent)***

Name	Henry Sumallo
Center	Fraud Management
Division	Investigations, Controls & Analysis, Data & Internet Services
Level	Executive
Employee Number	9163

Table 1: 9163 | Table 2: 9163 | Table 3: 9163

*RED CELLS INDICATE THAT EMPLOYEE NUMBERS ARE INCONSISTENT ACROSS THE 3 TABLES

Table 1: Summary of Competency Proficiency

Proficiency Level	Competency
4 - Specialist	Fraud Detection and Control
3 - Advanced	Audit and Assurance
	Case Management
	Customer Management
	Legal and Regulatory Knowledge
	Partner Management
	Product / Domain Knowledge
	Revenue Quantification and Management
	Risk Management and Internal Control
	Service Management and Delivery
2 - Intermediate	Business Process Design & Improvement
	Control Management
	Program Management
	Reporting and Measurement
	Third Party Compliance Management
1 - Beginner	Application Systems
	Continuous Improvement
	Data Management
	Data Science
0 - Level 0	Financial and Management Accounting

Table 2: Comparison of Self Assessment Rating and Line Manager Rating by Subcompetency

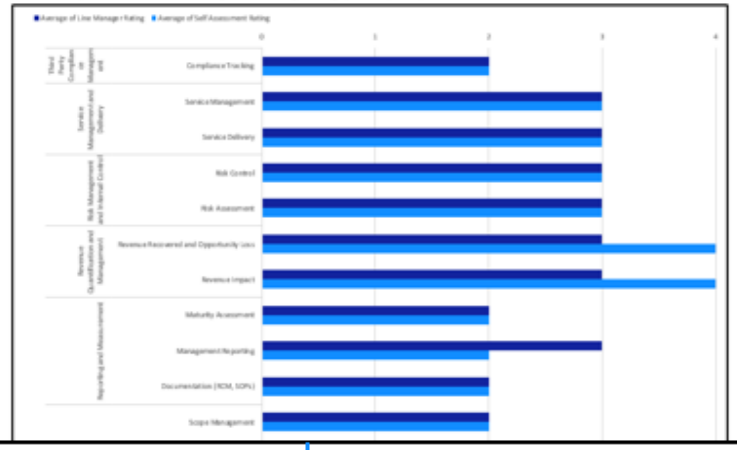

Table 3: Mapping of Readiness for RAFM roles based on Line Manager Assessment and Target Proficiency per Role

*Readiness for RAFM Roles**

**This table is based on the result from the Technical Competency Assessment. There are other factors that must be considered in determining the employee's suitability for the role such as Leadership Competencies, Functional Competencies, etc. that were not included in*

REVENUE ASSURANCE		FRAUD MANAGEMENT	
Head of Revenue Assurance	PERFORMING	**Head of Fraud Management**	COMPETENT
Revenue Assurance Team Lead	COMPETENT	Fraud Management Team Lead	MATURE
Revenue Assurance Specialist	COMPETENT	Fraud Management Specialist	MATURE
Revenue Assurance Analyst	COMPETENT	Fraud Management Analyst	MATURE
PARTNERING & GOVERNANCE			
Head of Partnering & Governance	PERFORMING		
Head of Strategy & Compliance Manager	PERFORMING	**Head of Systems Support & Governance**	DEVELOPING
Strategy & Compliance Team Lead	COMPETENT	Data Science & Advanced Analytics Expert	DEVELOPING
Strategy & Compliance Specialist	MATURE	Data Science & Advanced Analytics Specialist	DEVELOPING
Strategy & Compliance Analyst	MATURE	Data Science & Advanced Analytics Analyst	DEVELOPING
Process Assurance & Measurement Team Lead	PERFORMING	Systems Support & Governance Team Lead	DEVELOPING
Process Assurance & Measurement Specialist	COMPETENT	Systems Support & Governance Specialist	DEVELOPING
Process Assurance & Measurement Analyst	MATURE	Systems Support & Governance Analyst	DEVELOPING
Partner & Receivables Team Lead	PERFORMING	**Head of Product Lifecycle Management**	MATURE
Partner & Receivables Specialist	PERFORMING	Product Lifecycle Management Team Lead	MATURE
Partner & Receivables Analyst	COMPETENT	Product Lifecycle Management Specialist	MATURE
Head of ESS	DEVELOPING	Product Lifecycle Management Analyst	MATURE
Finance and Accounting Team Lead	DEVELOPING	**Head of Technology Lifecycle Managem**	PERFORMING
Finance and Accounting Specialist	DEVELOPING	Technology Lifecycle Management Team Lead	PERFORMING
Finance and Accounting Analyst	DEVELOPING	Technology Lifecycle Management Specialist	COMPETENT
		Technology Lifecycle Management Analyst	PERFORMING

Table 1. Summary of Competency Proficiency

This table lists the 20 Technical Competencies and categorizes them based on the levels of proficiency of the individual.

Table 2. Comparison of Self Assessment Rating and Line Manager Rating by Subcompetency

This table contains a clustered column chart which shows the graphic comparison of the individual's self assessment rating compared to the rating of his/her Line Manager at a subcompetency view.

Table 3. Mapping of Readiness for RAFM roles based on Line Manager Assessment and Target Proficiency per Role

This table lists all the future-state roles within RAFM and shows the readiness of the individual to each unique role. The Line Manager's rating of the individual is compared to the pre-defined Target Proficiency rating to determine readiness.

COMPETENCY GAP ASSESSMENT – INDIVIDUAL REPORT

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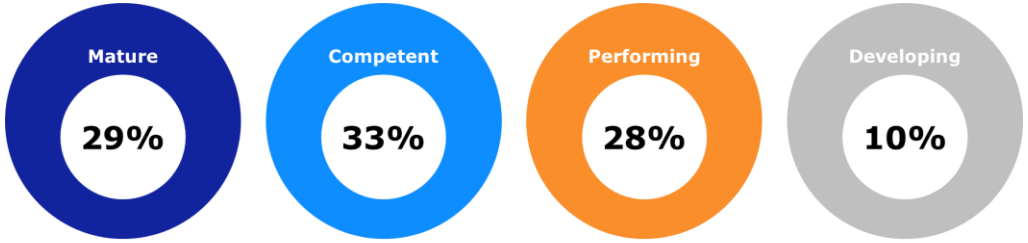
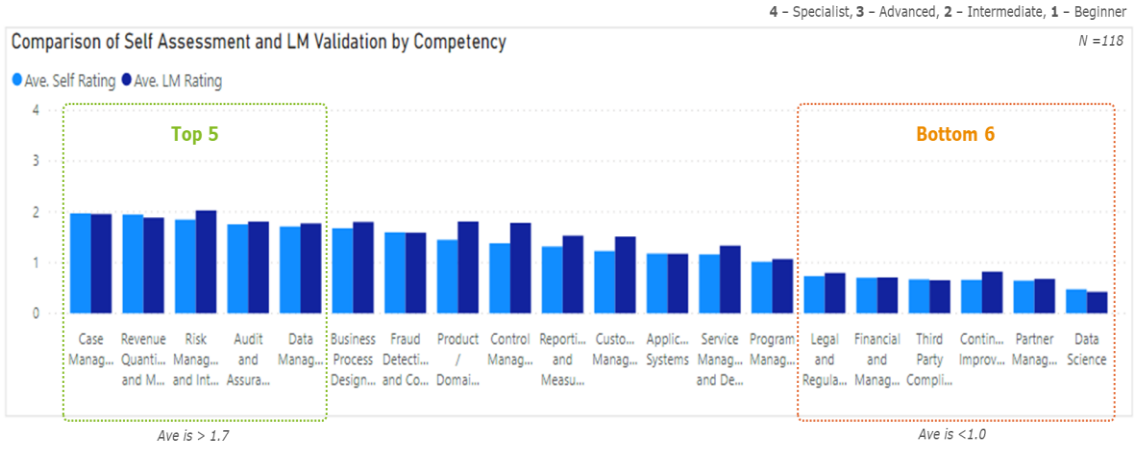
Group/Function Competency Summary



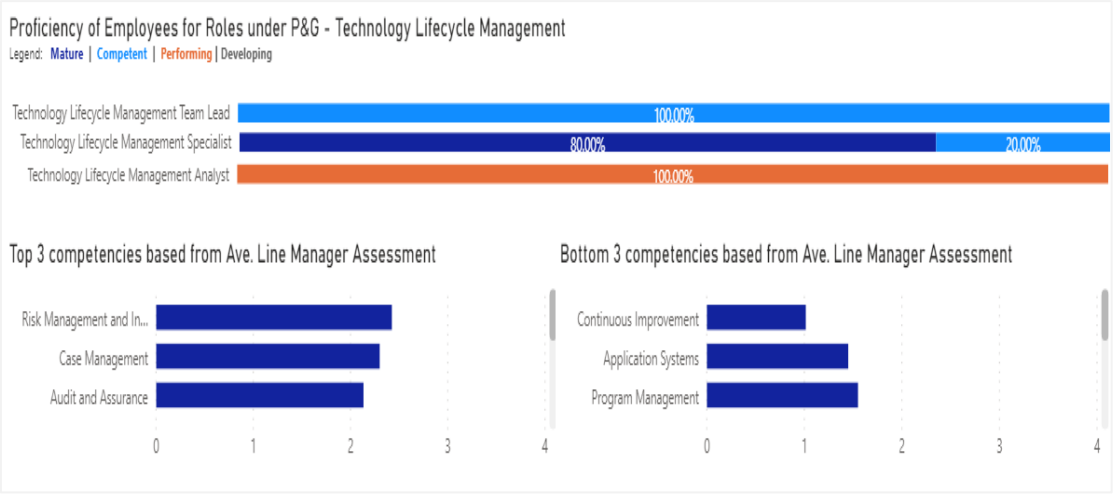
	Mature	Competent	Performing	Developing	*Total*
Revenue Assurance	6	18	11	5	40
Fraud Management	8	15	13	2	38
Partnering & Governance	20	6	9	5	40
Total	34	39	33	12	118

Team Competency Summary



Competency Assessment results will identify competency gaps at team and group level.

Proficiency for Future Roles



A Talent Dashboard will be made visible to the Functional Leaders.

LEARNING & DEVELOPMENT PROGRAMS

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For individualized, just-in-time learning

Digital Learning Tools

LinkedIn Learning coursera percipio

Based on defined career paths

External Programs

A few examples:

Advance Management Program (HBS)

Sustainability Leadership Program (WBCSD)

Asia-Oceania Mgt Seminar (Mitsubishi)

To address compliance requirements

Mandatory Programs

Annual Cybersecurity Program

Annual Code of Conduct & Ethics

Data Privacy Training

F2F, Live Online or Hybrid Learning

Leadership

Ayala Leadership Acceleration Program (LEAP)

Emerging Ayala Group Leaders Program (EAGLE)

6 Critical Practices of Leadership **for new leaders**

Coaching for Success

Persuasion & Influence

Communication

Executive Presence

Writing with Clarity & Insights

Executive Presentation Skills

Leader Communications (INSEAD)

Business Storytelling

Difficult Conversations

Radical Candor

Make Every Conversation Matter

Teamwork

Psychological Safety

Problem Solving & Decision Making

Problem Solving (McKinsey Academy)

Business Acumen & Perspectives

Strategic Negotiations (Harvard Kennedy Sch.)

Financial Modeling

Stakeholder & Quality Focus

Innovation & Change Management

Innovation Learning Program

Results Orientation

Project Management

Group Programs Schedule

LEAD Ayala University

EAGLE

Emerging Ayala Group Leaders Program

Program Description:
This program aims to develop skills that will enable leaders to achieve business goals by proactively preparing for complicated, multi-faceted negotiations from a strategic perspective. Immersed in a rich and focused learning experience that includes faculty presentation, case studies, and interactive negotiation simulations.

Nomination Criteria:
An ideal nominee would be one who is a middle manager reporting to a senior executive; is in charge of a functional / support work units; has been identified as a high-potential candidate and who is on track to take on a more senior role; can commit to weekly scheduled live sessions and participate in asynchronous learning activities.

Partner: Harvard Business Publishing

LEAD Ayala University

Strategic Negotiation

Program Description:
Program participants will enhance their effectiveness and confidence as negotiators. This will be accomplished via short lecture segments that will introduce frameworks, principles and research-based insights; interactive discussion; and, most of all, by preparing for and *conducting negotiations*, debriefing their results, and exploring the factors that most contributed to successful (and to unsuccessful) outcomes. There will also be an opportunity for Interactive discussion around negotiation topics and issues of particular concern to participants, drawing on their own experience.

Nomination Criteria:
An ideal nominee would be one who faces complex and challenging negotiations

Partner: Prof. Andy Zelleke, Senior Lecturer, Harvard Business School

INDIVIDUAL DEVELOPMENT PLAN

UNDERSTAND THE 70-20-10 LEARNING MODEL

The 70-20-10 model of learning is a widely recognized framework that suggests a proportional division of learning activities to enhance professional development.

As the 70/20/10 name implies, the learning model calls for 70 percent of development to consist of on-the-job learning, supported by 20 percent coaching and mentoring, and 10 percent classroom training

Here's a sample breakdown:

Skill to develop	Experiential (Job-based assignment) (70%)	Exposure (Who will you ask to help and how?) (20%)	Education (Formal training & self-study) (10%)
Public speaking	1 Record self giving presentation, watch recording, make notes, record presentation	1 Ask for manager's feedback about my meeting presentations	1 Complete podcast series on Public Speaking
	2 Ask manager if I can present a program update at the next ManCom meeting	2 Explicitly ask for feedback from participants after every presentation I give	
	3 Ask HR if I can lead a new hire training session		

UNDERSTAND THE 70-20-10 LEARNING MODEL

Remember! 70/20/10 plans should focus on **development goals**, not role objectives

DEVELOPMENT GOALS	ROLE OBJECTIVES
*The **skills** an individual should develop; may be specific to current role (i.e., performance) or in support of a future leadership role (i.e., potential)*	*The **objectives** an individual should accomplish for their role—i.e., the work they will perform to demonstrate particular skills and capabilities*
Examples	
• Increase understanding and use of data in decision making to manage program area more effectively	• Identify highest priority opportunities to improve program quality and effectiveness and implement plan to address
• Improve relationship-building skills and effectiveness in representing the organization to external stakeholders	• Gain support from city officials for the program's new initiative • Establish relationships with two new major funders
• Become a more effective supervisor by providing more consistent coaching and feedback to direct reports	• Identify and develop a potential successor for the program area

CREATING YOUR INDIVIDUAL DEVELOPMENT PLAN

Incorporating the concept of 70-20-10 model of learning in creating your Individual Development Plan.

1

- Identify a critical skill you or your direct report needs to develop

2

- Experience 70% - Come-up with a job-based projects or assignments that will build this skill.
- Exposure 20% - Come-up with a way you can leverage mentors and managers to better develop this skill
- Education 10% - Come-up with a formal book, conference, or other formal training experience that might support the development of this skill

3

- Share your plan with your direct report or manager for execution & monitoring of completion

INDIVIDUAL DEVELOPMENT PLAN

Individual Development Plan Template

Employee Information

Date:
Name:
Job Title:
Career Level:
Department:
Immediate Supervisor:

Career Goals

Aspired Future Role (>9 years timeline)	Sample Aspired Future Role (Long-term)
Current Role	Sample Entry-Level / Current Role

Development Plan for Current Role (1-3 years)

Development Area/s	Development Objectives	Development Type	Development Details/ Action Items / Milestones	Target Completion Date	Status
Sample Current Role Development Area 1	Sample Current Role Development Objectives - 1	70% Experience (OJT/ Immersion/ Projects/ Secondment) 20% Exposure (Coaching/ Mentoring/ Networking/ Conferences) 10% Education (Training Courses/ Workshops/ Books)			Not Started
Sample Current Role Development Area 2	Sample Current Role Development Objectives - 2				Not Started
Sample Current Role Development Area 3	Sample Current Role Development Objectives - 3				Not Started

CAREER PATHING

DEFINING OUR CAREER PATHS

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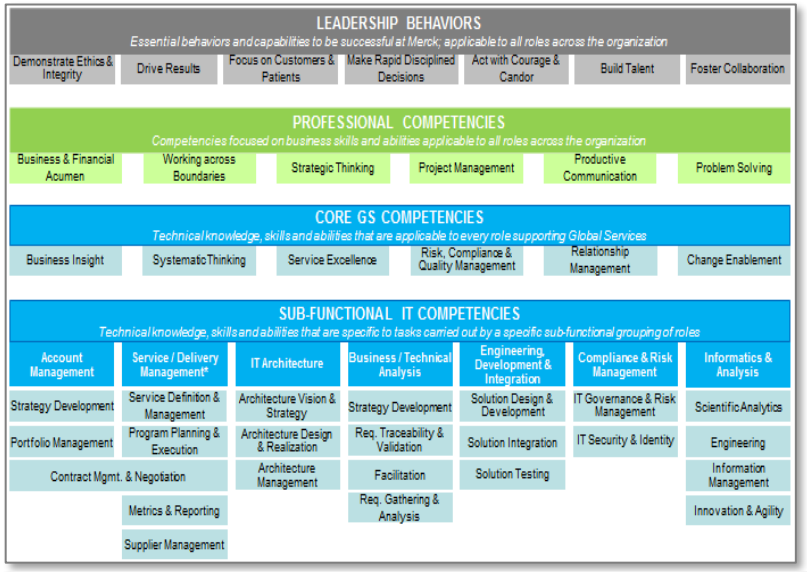
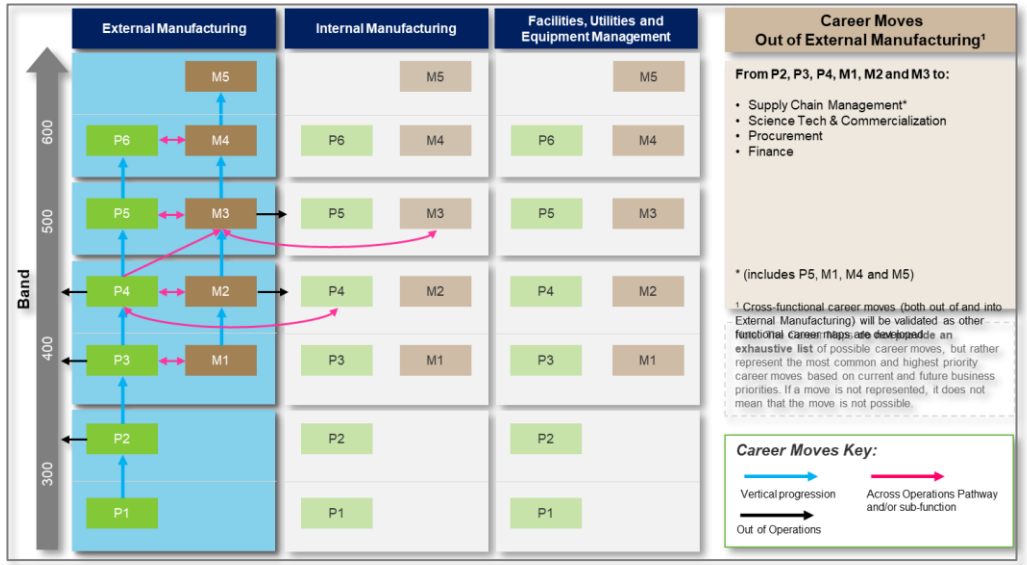
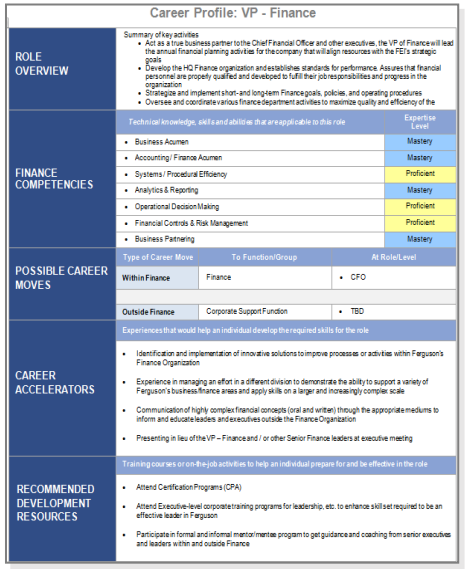
Job Architecture and Skills Taxonomy



Career Paths



Career Profile



Career Profile: VP - Finance

ROLE OVERVIEW	Summary of key activities • Act as a true business partner to the Chief Financial Officer and other executives, the VP of Finance will lead the annual financial planning activities for the company that will align resources with the FE's strategic goals • Develop the HQ Finance organization and establishes standards for performance. Assures that financial personnel are properly qualified and developed to fulfill their job responsibilities and progress in the organization • Strategize and implement short- and long-term Finance goals, policies, and operating procedures • Oversee and coordinate various finance department activities to maximize quality and efficiency of the	
FINANCE COMPETENCIES	*Technical knowledge, skills and abilities that are applicable to this role*	Expertise Level
	• Business Acumen	Mastery
	• Accounting / Finance Acumen	Mastery
	• Systems / Procedural Efficiency	Proficient
	• Analytics & Reporting	Mastery
	• Operational Decision Making	Proficient
	• Financial Controls & Risk Management	Proficient
	• Business Partnering	Mastery
POSSIBLE CAREER MOVES	Type of Career Move / To Function/Group / At Role/Level	
	Within Finance / Finance / • CFO	
	Outside Finance / Corporate Support Function / • TBD	
CAREER ACCELERATORS	Experiences that would help an individual develop the required skills for the role	
	• Identification and implementation of innovative solutions to improve processes or activities within Ferguson's Finance Organization	
	• Experience in managing an effort in a different division to demonstrate the ability to support a variety of Ferguson's business/finance areas and apply skills on a larger and increasingly complex scale	
	• Communication of highly complex financial concepts (oral and written) through the appropriate mediums to inform and educate leaders and executives outside the Finance Organization	
	• Presenting in lieu of the VP – Finance and / or other Senior Finance leaders at executive meeting	
RECOMMENDED DEVELOPMENT RESOURCES	Training courses or on-the-job activities to help an individual prepare for and be effective in the role	
	• Attend Certification Programs (CPA)	
	• Attend Executive-level corporate training programs for leadership, etc. to enhance skill set required to be an effective leader in Ferguson	
	• Participate in formal and informal mentor/mentee program to get guidance and coaching from senior executives and leaders within and outside Finance	

Using the Talent Planning outcomes, we will gain alignment of foundational career elements that will be critical for a holistic mobility ecosystem in the future. Employee can have access to tools for exploring diverse opportunities and gain clarity on skills needed for Elevate, Expand and Enrich career growth

DEFINING OUR CAREER PROFILES

We will interview employees that have made successful career moves and reflect them in our career path designs.

Career Move	Previous Position	Next Position	Why did you make this career move?	How did your previous position qualify or help you in your next position?	What have you gained from making this career move?
E.g., Lateral	*E.g., Research Analyst*	*E.g., Sales Executive*			
[Value]	[Example]				
[Value]	[Example]				
[Value]	[Example]				
[Value]	[Example]				
[Value]	[Example]				

DEFINING OUR CAREER PROFILES

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We will articulate each critical roles to a Persona for transparency of sample career tracks.

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FUTURE-READY BOARD DIRECTOR

Bert Ablaza
Independent Director at XYZ

Age: 65 years old
Resides in: Manila, frequent travels to Singapore and West coast
Marital Status: Married with 2 kids
Education: Engineering Honors with Wharton MBA

BUSINESS BACKGROUND

- Bert was the **APAC CEO for Citibank** until 2015 when he retired. He also serves on **the board of C-trip** China **and OCBC bank**
- Prior to joining Citibank, he **started his career at Bain consulting** in mergers and acquisitions.
- After his retirement, he has been **an investor and mentor to start-ups in the SEA region,** with particular interest in Indonesia and the Philippines, his home country.
- He is an avid reader, and is **intent on continued personal growth** and sees his current stage not as retirement but **creating greater impact to his surroundings.**

A day in the busy life of Bert Ablaza, a Board Director

- Morning coffee while reviewing daily news on RSS feed, Twitter and mobile notifications: to stay in touch with business, politics and other world developments
- Meet with his mentee, James DeSouza, a travel platform start-up founder whom he is mentoring, to discuss his partnership ideas
- Attend an informal online forum with the SEA fintech network who meets up monthly to exchange ideas
- Lunch with Jerry Ho, a venture capitalist in HK who visits Manila every month to discuss potential investment opportunities in fin-tech
- Social golf game at the country club with an ex-colleague and a friend who works in the Central bank - he came to know the regulators are looking to grant digital bank licenses to foreign players
- Accepted the invitation to be a panel speaker at the 2020 Fintech Festival - 'SuperApps reinventing daily lives of the mass'
- Makes a late call to his buddy who now lives in San Francisco and is an active investor of start-ups, to seek his inputs on the Silicon valley trip agenda that Bert is planning for the XYZ board
- Prepares materials for his lecture on 'financial capital markets' for Singapore Management University (virtual & live classes)

CREATING CAREER TRACKS

Career Pathing Template

Back to Introduction | Career Path Template

Instructions:

- Fill in details of the Aspired Future Role you are designing a Career Path for. (Think long-term, in >9 years timeline)
- Identify your Entry-Level (Current role) and Connector Roles (in 1-3 years timeline each connecting role) by order of their seniority level.
- Provide a brief description of each connecting role and add two or three main skills/experiences the role provides which are required to be successful in destination roles. Review the preparations you did (research, job descriptions, Linkedin profiles, transferable skills, interviews) for entering this information.
- Update the illustrative example highlighted in red based on your functional context.

Career Path Design Information

Aspired Future Role (>9 years timeline): Sample Aspired Future Role (Long-term)

Entry-Level / Current Role: Sample Entry-Level (Current Role)

Connecting Role Organization Template

Connecting Roles (1-3 years timeline each role)	Brief Description of Connecting Roles	Skills/Experiences Required to Gain
Sample Connecting Role 1	Sample Connecting Role 1 Description	Sample Connecting Role 1 Skills and Experiences Required to Gain
Sample Connecting Role 2	Sample Connecting Role 2 Description	Sample Connecting Role 2 Skills and Experiences Required to Gain
Sample Connecting Role 3	Sample Connecting Role 3 Description	Sample Connecting Role 3 Skills and Experiences Required to Gain
Sample Connecting Role 4	Sample Connecting Role 4 Description	Sample Connecting Role 4 Skills and Experiences Required to Gain

Career Path Template

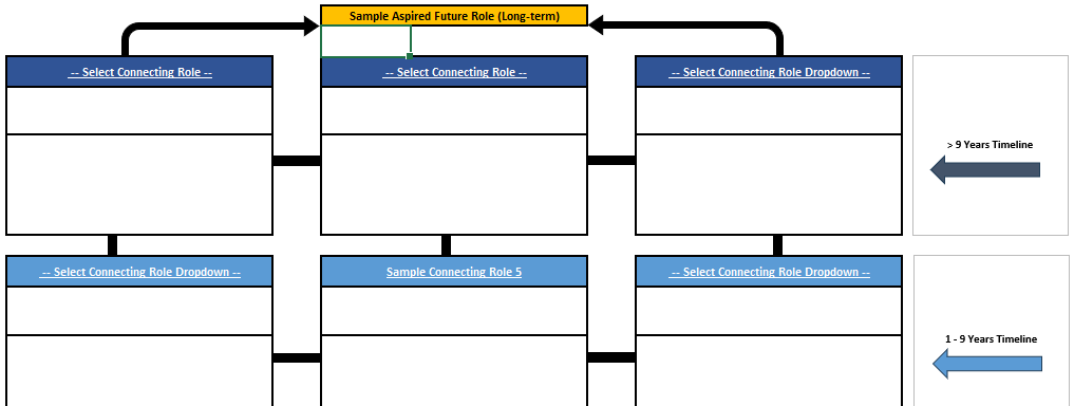
Back to Introduction

Employee Information

Date:
Name:
Job Title:
Career Level:
Department:
Immediate Supervisor:

Instructions:

-The template will automatically populate the destination and entry-level roles based on the inputs provided on the previous tab, 'Role Organization Template'.
- Select connecting roles from the drop-down lists in the blue cells, and corresponding information will be automatically populated.
- Provided below is a template for creating career path. Add/edit the roles as per your function's structure and requirement.



Access Link of Career Pathing Tool

TALENT PROFILE

TALENT PROFILE TEMPLATE

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Talent Profiling

Profile XXX-XXXXX

Insert your Corporate Picture 2x2

Current Position:

Level :

Area of Assignment :

Educational Attainment

Qualification	Institution	Year Graduated	Awards

Job Information

AG Joining Date	:	Age	:
Total AG Tenure	:	Years until Retirement	
Current AG Company	:	Regular Retirement	:
Other AG Companies	:	Special Program	:

Employment / Promotion History

Position Title	Company	Start Date	End Date

Access Link of Talent Profile Template

TALENT MANAGEMENT TOOLS

Kim Manager HR

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Career Goals and Individual Development Plan

- Talent Mobility Compass
- Career Management Framework
- Individual Development Plan & Talent Profile
- Career Pathing Tool
- Career Conversation GUIDE

Leadership Alignment & Talent Planning Lab

- Talent Management Framework
- SWOT Analysis & Insights
- Strategy and Roadmap

Critical Role Identification, Skills & Capacity Analysis

- Critical Role Identification
- Skills Analysis & Talent Plan
- FTE/ Capacity Calculator

Talent Classification, Career Pathing & Conversations

- Career Management Framework
- Talent Classification Tool
- Career Conversation GUIDE

Capability Development Programs

- EDUCATION: Workshops; Leadership (LEAP)
- EXPOSURE: Mentoring Program (MAP)
- EXPERIENCE: Secondment Program (MOVES); Taskforce Program (LTE)
- ENVIRONMENT: LinkedIn Learning; Coursera

Performance Management

- Performance Mgt System
- Coaching for Performance Guide

Growth Path System & Talent Acquisition

- Strategic Workforce Plan
- Manpower Request Form

Talent Pool Assessment and Performance Management Guide

- Talent Classification Matrix
- Career Management Framework

Talent Profiling & Succession Planning

- Succession Planning Tool
- Turn over / Transition Plan

APPENDIX:
CAREER LEVEL EXPECTATIONS AND COMPETENCIES MATRICES

CAREER LEVEL EXPECTATION MATRIX (1/2) – MANAGEMENT / LEADERSHIP TRACK

EXPECATIONS	STAFF	SENIOR STAFF	SPECIALIST / ANALYST	ASSOCIATE / SENIOR ANALYST	MANAGER	SENIOR MANAGER	ASSOCIATE DIRECTOR	EXECUTIVE DIRECTOR	MANAGING / SR. MANAGING DIRECTOR
ROLE DESCRIPTION	*N/A*	*Provides supervision to individual contributors (ICs), primarily in terms of work output and ability to meet team/role objectives. Acts as advisor to unit or sub-units and may become actively involved, as required, to meet schedules and resolve problems.*	*Manages, perhaps through other Team Leads, the coordination of the activities of a section or department with responsibility for results. May have staff reporting to them depending on team size/need.*	*Manages the work and teams of two or more departments. Oversees costs, strategies, and staffing. May have staff reporting to them depending on team size/need.*	*Leads a broad functional area through several department leads within the group. Has overall control of planning, staffing, budgeting, managing expense priorities, and recommending and implementing changes to methods.*	*Leads one or more functional areas, product groups or service areas through managers and leads who have overall responsibility for the successful operation of those assigned areas.*	*Leads a complete functional area through multiple levels of management within the group. Has overall control of planning, staffing, budgeting, and approving changes to strategies and practices. Manages a team of directors and/or high-level individual contributors.*	*Leads more than one functional area or product group through vice president level executive leaders who have overall operational responsibility for their assigned functions, geographic regions, and businesses.*	*Leads more than one functional area or product group through C-Suite level executive leaders across the group who have overall operational responsibility for their assigned functions, geographic regions, and businesses.*
JOB COMPLEXITY	*N/A*	*Works on issues within a defined team/ procedural framework. Exercises judgment within defined procedures to determine appropriate action.*	*Works on issues of diverse scope and familiar with current business trends. Follows processes and operational frameworks to solve problems.*	*Works on issues of diverse scope and familiar with current business trends. Follows processes and operational frameworks to solve problems. Acts as advisor to reports to meet goals and resolve problems. Develops and administers goals, schedules, and performance requirements; may have budget responsibilities.*	*Works on issues that require in-depth knowledge of organizational objectives. Establishes and assures adherence to budgets, schedules, work plans, and performance expectations.*	*Works on complex issues that require an in-depth knowledge of the company. Participates in company creation of methods, techniques, and evaluation criteria for projects, programs, and people. Ensures budgets and schedules meet company requirements.*	*Consistently works with abstract ideas or situations across functional areas of the business. Through assessment of intangible variables, identifies, and evaluates fundamental issues, providing strategy and direction for major functional areas. Requires in-depth knowledge of the functional area, business strategies, and the company's goals.*	*Develops strategic plans to ensure achievement of objectives across one or more functional areas. Requires an in-depth knowledge of the company, competitive environment, technology and products, and economic or social implications of company activities. Participates in development of company strategies, priorities, and evaluation criteria for projects, programs, and people. Approves budgets and plans.*	*Consistently works with abstract ideas or situations across functional areas of the business. Through assessment of intangible variables, identifies and evaluates core issues, providing strategy and direction for major functional areas. Requires in-depth knowledge of the function, business strategies, and the company's goals as well as external factors affecting governance of company activities.*
AUTONOMY & SCOPE	*N/A*	*Receives defined objectives and processes by which to meet goals. Provides direction to employees according to established policies and management guidance. Management reviews work to measure meeting of objectives.*	*Receives objectives and determines how to use resources to meet goals. Provides guidance to reports in alignment with team frameworks. Recommends changes to frameworks and establishes procedures that affect immediate organization(s).*	*Establishes operational objectives and work plans and assigns work to the appropriate reports. Senior management reviews objectives to determine success. Involved in developing, modifying and executing work that affect immediate operations and may also have company-wide effect.*	*Participates with other senior managers to establish strategic plans and objectives. Makes final decisions on administrative or operational matters and ensures effective achievement of objectives.*	*Develops company and/or organizational policies and oversees their implementation. Detailed knowledge of company allows for innovative concepts and promoting new ideas. Provides direction to senior managers in various areas, groups, and/or operations.*	*Sets vision, direction, and resource allocation for a significant organization or business unit. Responsible for multiple functions, products, departments, and/or geographies. Develops and implements strategic plans and objectives for the organization in alignment with company strategy; oversees direction and approves administrative, operational, and budgetary decisions to ensure achievement of objectives.*	*Sets vision and direction through resource allocation decisions for multiple significant organizations or business units where each is typically led by an executive. Develops corporate and/or organizational strategies and authorizes their implementation. Provides vision and direction to senior managers in various groups, and/or operations.*	*Develops company-wide vision and the strategy to achieve highest company priorities.*
LEADERSHIP		*Guides individual goal-setting aligned to team objectives.*	*Manages hiring and performance of direct reports. Develops a high-functioning and successful team.*	*Leads team goal-setting and defines deliverables and timelines. Responsible for hiring and overall performance of direct and skip-level reports.*	*Coaches and mentors others, including employees who do not directly report to them. Responsible for hiring senior talent and reducing the occurrence of single sources of knowledge within the team.*	*Drives and supports talent and succession planning within department.*	*Makes strategic decisions for hiring, departure, growth, and compensation in close partnership with the HR Team.*	*Shapes a people-first culture that exemplifies kindness, promotes helpfulness, and assumes positive intent. Builds a strong leadership pipeline with a future focus. Inspires teams to work toward a shared vision and common goals*	*Shapes a people-first culture that exemplifies kindness, promotes helpfulness, and assumes positive intent. Holds senior leadership accountable to living out the company culture defined by its identity traits and operating principles. Inspires business units to work toward a shared vision and common goals.*

CAREER LEVEL EXPECTATION MATRIX (1/2) – INDIVIDUAL CONTRIBUTOR / EXPERT TRACK

EXPECTATIONS	STAFF	SENIOR STAFF	SPECIALIST / ANALYST	ASSOCIATE / SENIOR ANALYST	MANAGER	SENIOR MANAGER	ASSOCIATE DIRECTOR	EXECUTIVE DIRECTOR	MANAGING / SR. MANAGING DIRECTOR
ROLE DESCRIPTION	*Acquires job skills and learns company policies and procedures to complete routine tasks.*	*Learns to use professional concepts. Applies team procedures to solve routine problems.*	*Developing professional expertise, applies company policies and procedures to resolve a variety of issues.*	*A seasoned, experienced professional with a full understanding of area of specialization; resolves a wide range of issues in creative ways.*	*Having wide-ranging experience, uses professional concepts and company objectives to resolve complex issues in creative and effective ways.*	*Having broad expertise or specialized knowledge, uses skills to contribute to development of company objectives and principles and to achieve goals in creative and effective ways.*	*As an expert in the field, uses professional concepts in developing resolution to critical issues and broad design matters.*	*A distinguished technical professional who guides a specialized and/or strategic functional/product roadmap; viewed as an expert in their field.*	*Top individual contributor technical position in the organization who brings domain expertise and impact equivalent to that of a C-Suite Leaders; a known expert in their field.*
JOB COMPLEXITY	*Works on assignments that are routine in nature, requiring limited judgment.*	*Works on problems of limited scope. Follows standard practices and procedures to solve problems. Builds stable working relationships internally to further problem-solving.*	*Works on problems of moderate scope and calls upon multiple known practices and procedures to solve problems. Exercises judgment within defined procedures and practices to resolve day-to-day problems. Builds productive internal/external working relationships.*	*Works on problems of diverse scope and has a developed sense of how to solve problems when in unknown territory. Demonstrates good judgment in selecting methods and techniques for obtaining solutions and escalating issues. Networks with senior internal and external personnel in own area of expertise.*	*Works on complex issues where analysis of situations or data requires an in-depth evaluation of variable factors. Exercises judgment in selecting methods, techniques, and evaluation criteria for obtaining results. Networks with key experts outside own area of expertise.*	*Works on significant and unique issues where analysis of situations or data requires an evaluation of intangibles. Exercises independent judgment in methods, techniques, and evaluation criteria for obtaining results. Creates formal networks involving coordination among groups.*	*Works on issues that directly impact current and future business success. Creates formal networks with key decision makers and serves as external spokesperson for the organization.*	*Generally oversees creative research or advanced development in areas such as new technologies, product innovation, engineering materials, or next-generation processes. (Some organizations only allow individual contributors at this level in the engineering area, but others allow it anywhere in the company.)*	*Oversees applied research or advanced engineering in the development of new products, materials, or processes.*
AUTONOMY & SCOPE	*Normally receives detailed instructions on all work. Requires supervision over both routine and non-routine work.*	*Normally receives detailed instructions on all work. Requires supervision over non-routine work.*	*Normally receives general instructions on routine work, detailed instructions on new projects or assignments.*	*Normally receives minimal instruction on day-to-day work. Seeks general instructions on new assignments.*	*Requires little oversight and reviewed only for technical integrity. Determines methods and procedures on new assignments and may coordinate activities of other personnel.*	*Acts independently to determine methods and procedures on new or special assignments. May supervise the activities of others.*	*Exercises wide latitude in determining objectives and approaches to critical assignments.*	*Directs and coordinates activities necessary to complete major projects, requiring a wide variety of technical skills. Consults with and provides guidance to senior management and a number of departments on advanced technical issues.*	*Directs and coordinates activities necessary to complete major projects, requiring a wide variety of technical skills. Consults with and provides guidance to senior management and a number of departments on advanced technical issues.*
LEADERSHIP	*Works with clearly defined methods and tasks that are described in detail*	*Has some influence in planning and timelines.*	*Gives actionable feedback that drives improvement. Coaches and mentors less experienced team members.*	*Helps others to learn and grow. Creates an environment to support a successful team. Coaches and mentors others within an immediate team.*	*Influences others to achieve team goals. Coaches and mentors others within immediate and peer teams. Supports a culture that is positive, inclusive, and engaging.*	*Leads by example in modeling the company's operating principles and identity traits and holds others accountable for doing the same. Delegates effectively and empowers others to execute tasks with accountability.*	*Role model for the company's operating principles and identity traits. Builds community across functional and product lines.*	*Champions the company's operating principles and identity traits and holds leaders accountable to demonstrate them.*	*Sets an inspiring vision and strategic direction that's inline with company mission.*

CORE COMPETENCY MATRIX (1/3)

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CORE COMPETENCY	STAFF	SENIOR STAFF	SPECIALIST / ANALYST	ASSOCIATE / SENIOR ANALYST	MANAGER	SENIOR MANAGER	ASSOCIATE DIRECTOR	EXECUTIVE DIRECTOR	MANAGING / SR. MANAGING DIRECTOR
LEADERSHIP	*Implement policies, multitask, manage time efficiently, seek self-development, consider team impact, ensure resource efficiency, and maintain accountability for work within standard guidelines.*	*Execute instructions collaboratively, embody company vision, multitask effectively, manage time, identify self-development opportunities, understand capabilities, consider team impact, use resources efficiently, and maintain accountability within guidelines..*	*Collaboratively execute instructions, embody company values, multitask for outcomes, manage time effectively, identify self-development opportunities, understand capabilities, consider team impact, use resources efficiently, and accept accountability within guidelines.*	*Execute instructions, policies, and programs collaboratively, embody the company's vision and values, multitask for expected outcomes, manage time effectively, identify opportunities for self-development, understand own capabilities, consider team impact, use resources efficiently within budget and time constraints, and accept accountability for work completion within standard guidelines.*	*Lead by example, motivate others to embody the company's vision, values, and principles with evident ownership of work, take risks and implement ideas within established parameters, assume responsibility for coaching and assisting others, actively seek learning opportunities, establish challenging performance standards, align team or department strategy with the company's vision, values, principles, and business goals, and make decisions that directly influence unit/team activities, income, customer relationships, and company operations.*	*Lead by example, motivate others to embody the company's vision, values, and principles with evident ownership of work, take risks and implement ideas within parameters, assume responsibility for coaching and assisting others, actively seek learning opportunities, establish challenging performance standards, align team or department strategy with the company's vision, values, principles, and business goals, and make decisions that directly influence unit/team activities, income, customer relationships, and company operations.*	*Foster an inclusive environment valuing others' contributions, take responsibility for group successes and failures, participate in setting company vision and values, motivate the organization through empowerment, risk-taking, innovation, selfless service, and continuous learning, and provide overall direction and authority for a major segment of the organization aligned with business strategy.*	*Foster an environment valuing contributions, take responsibility for group successes and failures, participate in setting company vision and values, motivate and inspire the organization through empowerment, risk-taking, innovation, selfless service, and continuous learning, and provide overall direction and authority over a major segment ensuring organization talent aligns with business strategy.*	*Foster an environment valuing contributions, accept responsibility for group successes and failures, participate in setting company vision, values, and principles, motivate and inspire the organization through empowerment, risk-taking, innovation, selfless service, and continuous learning, and provide overall direction and authority over a major segment ensuring organization talent aligns with business strategy.*
STAKEHOLDER and QUALITY FOCUS	*Identify and address customer needs through attentive listening, use feedback to enhance work processes, respond promptly to concerns, and efficiently correct service gaps for customer satisfaction and loyalty.*	*Identify customer needs through listening and questioning, utilize feedback for work activities, processes, or services, respond promptly to customer needs, and efficiently address service gaps to promote satisfaction and loyalty.*	*Explain processes, procedures, or actions to customers with appropriate facts, recommend changes for improved service levels, support business initiatives through customer contact, develop effective relationships, learn about customer requirements, and align with the company's business direction for stakeholder satisfaction.*	*Identify and address basic customer needs through listening and questioning, utilize customer information and feedback for effective work activities, promote satisfaction and loyalty, respond promptly to customer needs and concerns, and efficiently address service gaps in a timely manner.*	*Evaluate and approve improvements to customer service and relationships based on personal experience and expertise. Communicate effectively with customers, prioritize their interests in problem-solving efforts, foster a high-quality, value-added service attitude, encourage the collection of customer feedback, and enhance others' ability to meet customer needs through coaching, guidance, and feedback.*	*Evaluate and approve customer service improvements using personal experience, communicate effectively with customers, prioritize their interests in problem-solving efforts, foster a high-quality, value-added service attitude, encourage customer feedback collection, and enhance others' ability to meet and exceed customer needs through coaching, guidance, and feedback.*	*Leverage expertise across functional areas for effective problem-solving and meeting unique customer needs, empower and hold others accountable for customer satisfaction, model positive customer relations behaviors with flexibility, develop processes for group dynamics focusing on complete customer satisfaction, and implement business strategies aligned with customer needs.*	*Leverage expertise across functional areas for effective customer issue resolution, empower and hold others accountable for satisfying customers, model positive customer relations behaviors with flexibility and sensitivity to diverse needs, develop new processes for group dynamics focusing on complete customer satisfaction, and implement business strategies considering customer needs and requirements.*	*Lead organizational commitment to diverse customer needs, maintain focus on identifying and supporting opportunities for all customers, consider customer perspective in strategic decisions, address issues with a long-term perspective, and champion programs for excellent customer and community service.*
BUSINESS ACUMEN/ PERSPECTIVE	*Show understanding of company policies, procedures, products, and services, showcase functional expertise, and actively support strategy implementation within the department/team.*	*Demonstrate knowledge of company policies, procedures, products, and services, exhibit knowledge of own functional area and its impact, actively support department/team in strategy implementation.*	*Exercise prudence in using company resources for stakeholder value, provide information and resources to support line management, and understand how team or individual efforts impact the overall business strategy.*	*Demonstrate understanding of company policies, procedures, products, services, and customers, display working knowledge of own functional area and its impact on the business, and actively support department/team in strategy implementation.*	*Demonstrate comprehensive knowledge of the group's businesses, products, services, market dynamics, and competition in developing programs, strategies, and initiatives. Apply personal knowledge, experience, and expertise along with new business information/concepts in the functional area.*	*Demonstrate comprehensive knowledge of the group's businesses, products, services, market dynamics, and competition in developing programs, strategies, and initiatives, applying personal knowledge, experience, expertise, and integrating new business information/concepts in the functional area.*	*Apply a business perspective to drive bottom-line results, evaluate opportunities or threats to the company and take appropriate action, and promote an environment where employees understand the overall business strategy and its relation to team or individual goals.*	*Apply a business perspective to drive bottom-line results, evaluate opportunities or threats, take appropriate action, and promote an environment where employees understand the overall business strategy and its relation to team or individual goals.*	*Integrate and leverage knowledge of functional areas, resources, and industry practices, drive the business with a global perspective by moving ideas and expertise across locations and markets, and think strategically to anticipate emerging trends for future business growth.*

CORE COMPETENCY MATRIX (2/3)

CORE COMPETENCY	STAFF	SENIOR STAFF	SPECIALIST / ANALYST	ASSOCIATE / SENIOR ANALYST	MANAGER	SENIOR MANAGER	ASSOCIATE DIRECTOR	EXECUTIVE DIRECTOR	MANAGING / SR. MANAGING DIRECTOR
TECHNICAL KNOWLEDGE/ FUNCTIONAL EXPERTISE	*Demonstrate basic functional knowledge, gather data for analysis, adhere to defined policies, and actively acquire and apply new technical knowledge in the specific functional area.*	*Demonstrate basic knowledge in a specific function, gather data for analysis and decision-making, work following defined policies and procedures, network for new technical knowledge, and apply acquired concepts to the functional area.*	*Exercise discretion in independent work, apply knowledge and analytical skills to modify processes for objectives, and seek new knowledge in the functional area to innovate methods or systems.*	*Demonstrate basic knowledge in a specific function, gather relevant data for analysis and decision-making, work following defined policies and procedures or under direct supervision, and actively acquire and apply new technical knowledge in the functional area.*	*Show mastery in the primary discipline, lead technical problem-solving with insight from developed skills and experience, and make impactful technical contributions for business enhancement.*	*Demonstrate mastery in the primary discipline to enhance competitive advantage, provide leadership in technical problem-solving through a highly developed skill, knowledge, and experience base, and make significant technical contributions positively impacting the business.*	*Demonstrate a broad understanding of the functional area and proactively share it with others, acquire knowledge in areas related to but outside of the own functional area, and leverage that knowledge to support business unit objectives.*	*Demonstrate broad understanding of the functional area, proactively share it with others, acquire knowledge in related areas, and leverage that knowledge to support business unit objectives.*	*Demonstrate a broad understanding of the functional area, proactively share it with others, acquire knowledge in areas related to but outside own functional area, and leverage that knowledge to support business unit objectives.*
COMMUNICATION	*Offer regular feedback, actively listen to others' viewpoints, actively contribute in group discussions, and articulate ideas effectively both verbally and in writing.*	*Offer regular feedback, actively listen to others' viewpoints, actively contribute in group discussions, and articulate ideas effectively both verbally and in writing using appropriate language.*	*Deliver concise presentations, articulate benefits or compare alternatives clearly, demonstrate influence and persuasion skills, compose technical/management reports, and actively seek feedback on conveyed ideas and concepts.*	*Offer regular feedback on work activities, actively listen to others' viewpoints, participate and contribute actively in group discussions, and articulate ideas effectively both verbally and in writing using appropriate language.*	*Deliver formal presentations within expertise, lead discussions for a productive exchange of ideas, exhibit sensitivity to verbal and nonverbal cues, and identify and address real issues and concerns.*	*Deliver formal presentations within expertise, lead discussions for productive idea exchange, exhibit sensitivity to verbal and nonverbal cues, and identify and address real issues and concerns.*	*Deliver formal presentations on complex issues, employ communication and negotiation skills to resolve complex or sensitive issues within and outside the organization, and foster an environment of active listening and two-way communication.*	*Deliver formal presentations on complex issues, employ communication and negotiation skills to resolve complex or sensitive issues internally and externally, and promote an environment of active listening and two-way communication.*	*Present broad/complex business issues to the highest level of audience, promote the Company's goals and achievements internally and externally, and develop a high-level network to influence major decisions affecting the Company.*
TEAMWORK	*Comprehend role and group goals, actively participate in organizational teams, contribute to team goals through cooperation, take responsibility for team members, communicate work status, and support team decisions.*	*Understand role and work group goals in relation to the organization, participate as committed team members, contribute to team goals through cooperation, take responsibility for team members, keep the team informed of work status, and support team decisions.*	*Understand one's role, work group goals, and their connection to the organization. Actively participate as committed team members, often taking a leadership role, contribute to team goals through cooperation and responsibility, accept guidance, keep the team informed, and support team decisions.*	*Comprehend one's role and work group goals in relation to the organization, actively participate as a committed team member, contribute to team goals through cooperation and responsibility for other team members, keep the team informed of work status, and support team decisions.*	*Foster a collaborative environment based on trust and respect, engage with other teams for cross-team efforts, create opportunities for individual growth within the team while pursuing collective goals, utilize past experiences to resolve conflicts, and model commitment to team approaches and decisions.*	*Foster a team-oriented environment with trust and respect, collaborate with other teams for overall company success, create growth opportunities for team members while pursuing team and company goals, use past experiences to resolve team conflicts, and model commitment to team approaches and decisions.*	*Enable effective use of multi-functional or multi-organizational teams, articulate their purpose and value, align goals and objectives by formulating a common strategic direction, create an environment for team effectiveness, and develop a strategy to instill a sense of shared accountability, common purpose, and joint mission across all levels of the organization.*	*Enable effective use of multi-functional or multi-organizational teams, articulate their purpose and value, align goals and objectives with a common strategic direction, create and support an environment for team effectiveness, and develop a strategy to instill a sense of shared accountability, common purpose, and joint mission across all levels of the organization.*	*Provide opportunities for the effective use of multi-organizational teams, articulate their purpose and value, align the goals and objectives by championing a common strategic direction, and create an environment for team effectiveness with shared accountability throughout the organization.*

CORE COMPETENCY MATRIX (3/3)

CORE COMPETENCY	STAFF	SENIOR STAFF	SPECIALIST / ANALYST	ASSOCIATE / SENIOR ANALYST	MANAGER	SENIOR MANAGER	ASSOCIATE DIRECTOR	EXECUTIVE DIRECTOR	MANAGING / SR. MANAGING DIRECTOR
INNOVATION and CHANGE MANAGEMENT	*Embrace change with a positive attitude, contribute improvement ideas, adapt to new approaches and technologies, and take responsibility for enhancing work processes.*	*Demonstrate a positive attitude toward change, willingly adapt to new processes, contribute improvement ideas, learn and apply new approaches and technologies, and take responsibility for enhancing own work processes while eliminating unnecessary work.*	*Initiate and follow through change or innovation efforts by challenging the status quo, taking necessary risks, participating in activities for innovative ideas, and adopting a mindset of continuous improvement.*	*Demonstrate a positive attitude toward change, willingly adapt to new processes, contribute improvement ideas, learn and apply new approaches and technologies, and take responsibility for enhancing own work processes while eliminating unnecessary work.*	*Promote a pioneering spirit by encouraging creative alternatives and innovation, identify challenges and develop solutions using expertise, and support organizational initiatives in response to the changing business environment.*	*Encourage a pioneering spirit by promoting creative alternatives, innovative ideas, and appropriate risks, identify potential challenges, develop suitable alternatives using expertise, and support organizational initiatives for adapting to the changing business environment.*	*Champion change efforts by innovating within one's group to add value to the company, integrate ideas to generate new alternative solutions beyond standard approaches.*	*Champion change through innovative initiatives in one's group to add value to the company, building on and integrating diverse ideas to create alternative solutions beyond standard approaches.*	*Champion change by innovating within one's group to add value to the company, integrating diverse ideas, and creating alternative solutions beyond standard approaches.*
RESULTS ORIENTATION	*Effectively plan and organize work for timely and quality completion, show flexibility in tasks for high-quality results, take responsibility for outcomes and decisions, and exhibit a bias for action and commitment to high performance.*	*Plan and organize work for timely completion with quality, exhibit flexibility for varied tasks and high-quality results, accept responsibility for outcomes and decisions, and demonstrate a bias for action and commitment to high performance.*	*Demonstrate resourcefulness and persistence to achieve objectives, adapt to multiple demands and shifting priorities, and actively participate in ad hoc projects to ensure the accomplishment of company/team goals.*	*Plan and organize work for timely completion within established time frames and quality standards, exhibit flexibility in performing tasks for high-quality results, accept responsibility for outcomes and decisions made, and demonstrate a bias for action and commitment to high levels of performance.*	*Demonstrate project management skills, utilize networking for assistance in achieving business objectives, promote an action-oriented atmosphere with a sense of urgency, and work to overcome obstacles in goal achievement.*	*Demonstrate project management skills in leading projects, utilize networking for assistance in achieving business objectives, promote an action-oriented atmosphere conveying urgency, and work to overcome obstacles in goal achievement.*	*Create synergies by orchestrating resources and organizing activities to complete projects, motivate others for timely project completion, assert influence to meet goals and achieve results beyond requirements, and implement/enhance programs recognizing achievement of desired results.*	*Orchestrate resources and organize activities for project completion, motivate others to meet project deadlines, assert influence to exceed goals, and implement/enhance programs recognizing the achievement of desired results.*	*Establishes a results-driven environment aligned with corporate values, encourages learning from mistakes, institutionalizes systems recognizing achievements, and defines and communicates business strategies and success measures.*
PROBLEM SOLVING and DECISION MAKING	*Timely resolution of routine problems using established practices, analyzing issues methodically, maintaining composure under work pressures, and collaborating with others for problem-solving and decision-making.*	*Resolve routine problems timely using established practices, analyze problems by breaking them into simple tasks, handle work pressures with composure, and collaborate with others to seek assistance in problem-solving and decision-making.*	*Navigate ambiguity with unclear or incomplete information, make judgment calls for workable solutions, consider risks, benefits, and adverse consequences when problem-solving, and exercise prudence, foresight, and time management in resource utilization for decision-making.*	*Resolve routine problems timely using established practices, analyze problems by breaking them into simple tasks, handle work pressures with composure, and collaborate with others to seek assistance in problem-solving and decision-making.*	*Identify complex problems and propose proactive solutions, encourage peers/team members to take risks within parameters, and assist in ensuring effective decision implementation.*	*Identify complex problems, conceptualize proactive solutions, encourage peers/team members to take risks within parameters, and assist in ensuring effective implementation of decisions.*	*Make decisions across functional areas with long-term impact on the organization, anticipate potential problems and consequences, and develop contingency plans.*	*Make decisions across functional areas with long-term impact on the organization, anticipate potential problems and consequences, and develop contingency plans.*	*Contributes at the highest level to decisions on the Company's strategic direction, evaluates broader implications on the community, industry, and country, and fosters an environment valuing analytical thinking and innovative problem-solving.*

LEADERSHIP COMPETENCY MATRIX (1/8)

LEADERSHIP COMPETENCY	STAFF	SENIOR STAFF	SPECIALIST / ANALYST	ASSOCIATE / SENIOR ANALYST	MANAGER	SENIOR MANAGER	ASSOCIATE DIRECTOR	EXECUTIVE DIRECTOR	MANAGING / SR. MANAGING DIRECTOR
LONG-TERM PERSPECTIVE and VISIONING	*Demonstrates basic understanding of business outcomes. Follows established guidelines and procedures without a long-term perspective. Aligns work with immediate goals.*	*Identifies factors influencing business decisions. Begins to articulate a vision for the team or unit. Aligns work with broader company goals.*	*Understands business outcomes and factors influencing decisions. Articulates a vision for the team or unit within the functional area. Aligns work with company vision and strategy.*	*Demonstrates understanding of business outcomes and emerging trends. Clearly articulates a vision for the team or unit. Aligns work with company vision and strategy.*	*Anticipates factors and emerging trends affecting business decisions. Creates a clear and compelling vision for the team or department. Aligns team goals with company vision and strategy.*	*Displays foresight in anticipating business trends. Articulates a vision that aligns with company strategy. Ensures team goals contribute to the long-term success of the company.*	*Anticipates external factors impacting business decisions. Creates and communicates a compelling vision for a major segment. Aligns team objectives with company vision and strategic goals.*	*Demonstrates foresight in understanding industry trends. Articulates a compelling vision for a significant portion of the organization. Ensures team goals contribute significantly to the company's long-term success.*	*Anticipates and shapes industry trends and factors. Crafts and communicates a visionary outlook for the entire organization. Aligns all facets of the organization with a strategic, long-term perspective.*
PLANNING	*Follows established procedures without involvement in strategic planning. Focuses on immediate tasks with limited consideration for long-term goals. Executes tasks based on given priorities.*	*Begins to understand the importance of long-term planning. Contributes to discussions on short-term goals. Follows established priorities for daily tasks.*	*Participates in strategic discussions for the functional area. Contributes to the formulation of short-term goals. Aligns work with departmental priorities.*	*Formulates strategies consistent with immediate business needs. Develops short-term goals for the team or unit. Allocates resources based on immediate priorities.*	*Actively participates in strategic planning for the department. Establishes short-term and some long-term goals for the team. Allocates resources to support defined goals.*	*Formulates and communicates departmental strategies. Establishes both short-term and long-term goals for the team. Allocates resources strategically based on priorities.*	*Drives strategic planning for a major segment or department. Establishes comprehensive short-term and long-term goals. Allocates resources effectively to support strategic priorities.*	*Shapes and communicates strategic direction for a significant portion of the organization. Sets both short-term and visionary long-term goals. Allocates resources strategically to align with organizational priorities.*	*Formulates and communicates the overall strategic direction for the entire organization. Sets comprehensive short-term and long-term goals for the company. Allocates resources strategically across the organization for optimal results.*
INNOVATION and GROWTH ORIENTATION	*Follows established processes without actively seeking innovative solutions. Limited involvement in experimenting with new ideas. Adheres to existing systems and structures.*	*Acknowledges the importance of innovation but not actively involved in fostering it. Expresses openness to new ideas but primarily follows established procedures. Adheres to existing systems with limited experimentation.*	*Actively seeks and supports new ideas within the functional area. Contributes to the creation of an environment conducive to experimentation. Supports innovation within the existing systems.*	*Initiates and supports innovative solutions within immediate work scope. Participates in experiments and takes calculated risks. Begins to set up structures that support innovation.*	*Actively encourages and supports innovative thinking within the team. Takes calculated risks and experiments with new approaches. Establishes systems and structures to support innovation within the team.*	*Creates an environment that fosters a culture of innovation within the department. Actively challenges conventional thinking for new initiatives. Sets up comprehensive systems to encourage creativity and experimentation.*	*Champions breakthrough thinking at a major departmental level. Pursues new initiatives to support business growth. Establishes structures that encourage and reward innovation.*	*Drives innovation throughout a significant portion of the organization. Actively challenges conventional thinking at an organizational level. Sets up company-wide systems and structures to support innovation.*	*Champions breakthrough thinking across the entire organization. Pursues new initiatives to support overall business growth. Establishes comprehensive systems and structures to foster innovation throughout the company.*

LEADERSHIP COMPETENCY MATRIX (2/8)

LEADERSHIP COMPETENCY	STAFF	SENIOR STAFF	SPECIALIST / ANALYST	ASSOCIATE / SENIOR ANALYST	MANAGER	SENIOR MANAGER	ASSOCIATE DIRECTOR	EXECUTIVE DIRECTOR	MANAGING / SR. MANAGING DIRECTOR
DECISION MAKING	*Makes decisions within a limited scope of work. Follows established procedures without taking significant risks. Generally reactive in decision-making.*	*Makes decisions within their functional area. Balances risks and follows established procedures. Anticipates outcomes but within a limited context.*	*Makes informed decisions within the functional area. Balances risks and explores alternatives. Anticipates possible outcomes within the scope of specialization.*	*Makes decisions impacting immediate work scope. Demonstrates a balanced approach to risk. Anticipates outcomes within the team's context.*	*Makes decisions for the team or department. Balances risks and actively explores alternatives. Anticipates outcomes at a departmental level.*	*Makes decisions impacting a significant portion of the organization. Balances risks strategically for the organization. Anticipates outcomes at an organizational level.*	*Makes decisions for a major departmental segment. Balances risks strategically for the department. Anticipates outcomes within a significant organizational context.*	*Makes decisions impacting multiple departments. Balances risks strategically for the entire organization. Anticipates outcomes across various organizational contexts.*	*Makes decisions at an organizational level. Balances risks strategically for the entire company. Anticipates outcomes across all organizational functions.*
MARKET/ INDUSTRY KNOWLEDGE and INFLUENCE	*Promotes the company's brand within immediate work scope. Represents the company within a limited context. Demonstrates awareness of basic industry trends.*	*Promotes the company's brand within their functional area. Represents the company within the immediate work context. Embodies company values within their scope of work. Shows basic awareness of industry dynamics.*	*Promotes the company's brand within the specialization. Represents the company as a specialist in the field. Embodies company values within the functional area. Actively follows and responds to industry trends.*	*Promotes the company's brand within immediate responsibilities. Represents the company within the team's context. Embodies company values within the team. Demonstrates understanding of broader industry trends.*	*Promotes the company's brand within the team or department. Represents the company in managerial capacities. Embodies company values at the departmental level. Utilizes market intelligence for team decisions.*	*Promotes the company's brand at an organizational level. Represents the company in strategic organizational contexts. Embodies company values at an organizational level. Proactively shapes industry trends using market intelligence.*	*Promotes the company's brand within a significant departmental segment. Represents the company in influential industry roles. Embodies company values at a significant organizational level. Takes an active role in shaping industry trends.*	*Promotes the company's brand across multiple departments. Represents the company in high-profile industry roles. Embodies company values across various organizational contexts. Demonstrates deep awareness and influence in the industry.*	*Promotes the company's brand at an organizational level. Represents the company in key industry leadership positions. Embodies company values at the highest organizational level. Exercises significant influence in shaping industry trends.*
PARTNERSHIP BUILDING and NETWORKING	*Collaborates within immediate team or department. Participates in basic team initiatives.*	*Collaborates across departments for common goals. Initiates partnerships within their functional area.*	*Builds partnerships within the specialization. Initiates collaborations with external entities. Provides input on strategic partnerships within the specialization.*	*Establishes partnerships within immediate responsibilities. Initiates collaborations with external teams or units. Provides input on strategic partnerships within the team.*	*Builds partnerships within the team or department. Initiates collaborations with external departments. Provides strategic direction on partnerships within the department.*	*Fosters collaborations across multiple teams or departments. Initiates collaborations with external organizations. Provides strategic direction on partnerships within the organizational segment.*	*Builds partnerships within a significant departmental segment. Initiates collaborations with external entities at an influential level. Provides strategic direction on partnerships within the significant segment.*	*Fosters collaborations across multiple departments. Initiates collaborations with influential external organizations. Provides strategic direction on partnerships within the organization.*	*Forges collaborations at an organizational level. Initiates high-profile collaborations with external entities. Provides strategic direction on partnerships at the highest organizational level.*

LEADERSHIP COMPETENCY MATRIX (3/8)

LEADERSHIP COMPETENCY	STAFF	SENIOR STAFF	SPECIALIST / ANALYST	ASSOCIATE / SENIOR ANALYST	MANAGER	SENIOR MANAGER	ASSOCIATE DIRECTOR	EXECUTIVE DIRECTOR	MANAGING / SR. MANAGING DIRECTOR
SOCIAL RESPONSIBILITY	*Adheres to ethical conduct and follows company policies. Understands basic corporate social responsibility initiatives.*	*Demonstrates adherence to ethical standards. Participates in social responsibility initiatives within their functional area.*	*Integrates social responsibility into their specialization. Initiates and participates in departmental social responsibility projects.*	*Integrates social responsibility into immediate responsibilities. Participates in cross-functional social responsibility initiatives. Advocates for social responsibility within the team.*	*Integrates social responsibility into the team or department. Drives social responsibility projects within the department. Advocates for social responsibility within the department.*	*Fosters social responsibility across multiple teams or departments. Drives social responsibility projects at an organizational level. Advocates for social responsibility within the organizational segment.*	*Leads social responsibility efforts within a significant departmental segment. Drives social responsibility projects at an influential level. Advocates for social responsibility within the significant segment.*	*Drives social responsibility across multiple departments. Initiates high-profile social responsibility projects at an organizational level. Advocates for social responsibility within the organization.*	*Sets the tone for social responsibility at an organizational level. Drives impactful social responsibility projects. Advocates for social responsibility at the highest organizational level.*
LINE OF SIGHT/ ALIGNMENT	*Understands team goals and how they contribute to broader objectives. Follows instructions and executes tasks aligned with team objectives.*	*Collaboratively sets goals with the team. Communicates team goals effectively to team members. Seeks alignment with team objectives in day-to-day tasks.*	*Translates broader organizational goals into specific objectives for the team. Identifies key stakeholders and works towards alignment with team goals. Establishes decision rights within the team.*	*Aligns team goals with broader organizational strategy. Mobilizes and influences team members toward achieving shared objectives. Establishes decision rights within the immediate team.*	*Translates organizational strategy into actionable goals for the department. Mobilizes and influences team members and key stakeholders toward departmental objectives. Establishes decision rights within the department.*	*Aligns departmental goals with broader organizational strategy. Mobilizes and influences multiple teams and key stakeholders toward shared objectives. Establishes decision rights within multiple departments.*	*Translates organizational strategy into specific goals for a significant segment. Mobilizes and influences multiple departments and key stakeholders. Establishes decision rights within a significant departmental segment.*	*Aligns organizational strategy with specific goals for multiple departments. Mobilizes and influences organizational segments and key stakeholders. Establishes decision rights within significant organizational segments.*	*Translates organizational strategy into specific goals for the entire organization. Mobilizes and influences organizational segments and key stakeholders at the highest level. Establishes decision rights at the highest organizational level.*
RESOURCE MANAGEMENT and ACCOUNTABILITY	*Manages individual tasks efficiently within given resources. Follows instructions and completes tasks with accountability.*	*Collaboratively manages tasks, considering available resources. Understands the importance of resource allocation for task completion. Takes accountability for assigned tasks and outcomes.*	*Manages resources within the functional area effectively. Establishes priorities for tasks and projects. Holds oneself and the team accountable for results.*	*Manages resources within the team to achieve objectives. Sets priorities for the team's tasks and projects. Holds the team accountable for delivering results.*	*Manages departmental resources to optimize business outcomes. Establishes priorities for departmental tasks and projects. Holds the department accountable for achieving results.*	*Manages resources across multiple departments. Sets priorities for organizational tasks and projects. Holds multiple departments accountable for results.*	*Manages resources within a significant organizational segment. Establishes priorities for a significant segment's tasks and projects. Holds a significant segment accountable for achieving results.*	*Manages organizational resources to optimize overall outcomes. Sets priorities for organizational tasks and projects. Holds the organization accountable for achieving results.*	*Manages all organizational resources at the highest level. Sets overarching priorities for the entire organization. Holds the entire organization accountable for achieving strategic results.*

LEADERSHIP COMPETENCY MATRIX (4/8)

LEADERSHIP COMPETENCY	STAFF	SENIOR STAFF	SPECIALIST / ANALYST	ASSOCIATE / SENIOR ANALYST	MANAGER	SENIOR MANAGER	ASSOCIATE DIRECTOR	EXECUTIVE DIRECTOR	MANAGING / SR. MANAGING DIRECTOR
PROCESS DISCIPLINE	*Follows established processes and guidelines for tasks. Completes activities according to given plans. Adheres to standard procedures.*	*Collaboratively follows and contributes to established processes. Monitors and ensures tasks align with project objectives. Participates in process improvement discussions.*	*Establishes and follows processes within the functional area. Monitors and adjusts activities to align with project goals. Actively participates in process improvement initiatives.*	*Manages team activities within established processes. Ensures alignment of tasks with project objectives. Identifies opportunities for process enhancements.*	*Establishes and manages departmental processes. Monitors and ensures departmental activities align with objectives. Actively leads process improvement efforts.*	*Manages cross-functional processes within the organization. Ensures alignment of activities with organizational goals. Leads and champions organization-wide process improvements.*	*Establishes and oversees processes within a significant organizational segment. Monitors and adjusts activities to align with segment goals. Drives process improvements for the segment.*	*Manages organizational processes to achieve overall objectives. Ensures all activities align with organizational goals. Leads strategic process improvement initiatives.*	*Establishes and oversees all organizational processes. Ensures alignment of all activities with strategic objectives. Drives continuous improvement across the entire organization.*
INTELLIGENT RISK-TAKING	*Follows established guidelines and procedures. Executes tasks with minimal deviation. Limited involvement in risk assessment.*	*Collaboratively identifies and assesses risks. Participates in risk mitigation discussions. Implements risk mitigation strategies.*	*Proactively identifies and assesses risks within the functional area. Participates in developing risk mitigation plans. Takes calculated risks within the defined scope.*	*Manages risks within the team's activities. Actively participates in risk assessment and mitigation. Takes calculated risks to achieve team objectives.*	*Identifies and manages risks within the department. Leads risk assessment and mitigation efforts. Encourages calculated risks to achieve departmental goals.*	*Manages cross-functional risks within the organization. Leads organization-wide risk assessments. Promotes calculated risk-taking at all levels.*	*Oversees risks within a significant organizational segment. Develops and implements risk mitigation strategies. Promotes a culture of intelligent risk-taking.*	*Manages organizational risks strategically. Drives organization-wide risk management initiatives. Establishes risk-awareness culture across all functions.*	*Ensures intelligent risk-taking aligns with strategic objectives. Leads enterprise-wide risk management efforts. Embeds a culture of intelligent risk-taking throughout the organization.*
CHANGE MANAGEMENT	*Adapts to changes in assigned tasks. Requires guidance during changes. Limited involvement in change planning.*	*Adapts to changes in responsibilities. Participates in change discussions. Implements changes within own scope.*	*Guides others through changes within the functional area. Contributes to change planning. Implements and supports changes effectively.*	*Manages team transitions during changes. Participates in change strategy development. Ensures team compliance with changes.*	*Manages departmental transitions during changes. Leads change strategy within the department. Ensures team alignment with organizational changes.*	*Manages cross-functional transitions during changes. Drives change strategy for organizational segments. Ensures alignment and compliance across functions.*	*Oversees changes within a significant organizational segment. Develops and implements change strategies. Addresses stakeholder concerns and encourages buy-in.*	*Drives organization-wide change initiatives. Leads change strategy for the entire organization. Fosters a culture of adaptability and innovation.*	*Shapes the organization's response to industry-wide changes. Drives strategic change initiatives. Embeds a culture of continuous improvement and adaptability throughout the organization.*

LEADERSHIP COMPETENCY MATRIX (5/8)

LEADERSHIP COMPETENCY	STAFF	SENIOR STAFF	SPECIALIST / ANALYST	ASSOCIATE / SENIOR ANALYST	MANAGER	SENIOR MANAGER	ASSOCIATE DIRECTOR	EXECUTIVE DIRECTOR	MANAGING / SR. MANAGING DIRECTOR
ORGANIZATIONAL CAPABILITY BUILDING	*Follows organizational structure and roles. Adapts to assigned tasks and roles. Limited involvement in organizational planning.*	*Collaborates within own functional area. Adapts to changes in roles and responsibilities. Participates in discussions on organizational needs.*	*Shapes team structure within the functional area. Identifies and develops required competencies. Supports organizational collaboration initiatives.*	*Manages team structures for optimal performance. Identifies future competencies for the team. Collaborates within and across teams.*	*Shapes departmental structures and roles. Identifies competencies needed within the department. Facilitates collaboration within the department.*	*Shapes cross-functional team structures. Identifies competencies needed across functions. Fosters collaboration across departments.*	*Designs structures within a significant organizational segment. Identifies and develops competencies for the segment. Promotes collaboration within and across segments.*	*Designs organization-wide structures and roles. Identifies and develops organization-wide competencies. Fosters collaboration across the organization.*	*Shapes industry-leading organizational structures. Identifies and develops industry-leading competencies. Establishes collaboration initiatives across the industry.*
PERFORMANCE MANAGEMENT	*Follows established performance standards. Adapts to delegated tasks and responsibilities. Contributes to team goals.*	*Collaborates within own functional area. Adapts to changes in roles and responsibilities. Recognizes and appreciates team contributions.*	*Sets performance standards within the functional area. Delegates responsibilities based on expertise. Acknowledges and values team accomplishments.*	*Establishes performance expectations for the team. Empowers team members with delegated responsibilities. Celebrates team milestones and successes.*	*Sets high standards for departmental performance. Delegates authority for effective team management. Fosters an environment valuing individual and team contributions.*	*Sets performance standards for cross-functional teams. Delegates responsibilities across functions. Celebrates cross-functional accomplishments.*	*Establishes performance criteria for a significant organizational segment. Empowers leaders within the segment. Celebrates segment milestones and successes.*	*Sets organization-wide performance standards. Delegates authority for effective organizational management. Fosters an environment valuing contributions at the organizational level.*	*Sets industry-leading performance standards. Delegates responsibilities across the industry. Celebrates industry-wide accomplishments and milestones.*
PEOPLE DEVELOPMENT	*Adapts to own role requirements. Participates in skill development opportunities. Learns from daily tasks and responsibilities.*	*Collaborates with team members. Identifies personal areas for improvement. Shares knowledge and best practices.*	*Leverages team members' strengths. Identifies and addresses skill gaps. Mentors junior team members.*	*Provides leadership opportunities for team members. Supports career development plans. Encourages continuous learning.*	*Identifies and develops team members' strengths. Addresses skill gaps within the team. Mentors and guides team members.*	*Provides leadership opportunities across functions. Supports career development across teams. Promotes continuous learning organization-wide.*	*Leverages strengths across a significant organizational segment. Addresses skill gaps within the segment. Mentors leaders within the segment.*	*Provides leadership opportunities at an organizational level. Supports career development organization-wide. Promotes continuous learning across the organization.*	*Leverages strengths and addresses skill gaps across the industry. Mentors leaders at an industry level. Promotes continuous learning industry-wide.*

LEADERSHIP COMPETENCY MATRIX (6/8)

LEADERSHIP COMPETENCY	STAFF	SENIOR STAFF	SPECIALIST / ANALYST	ASSOCIATE / SENIOR ANALYST	MANAGER	SENIOR MANAGER	ASSOCIATE DIRECTOR	EXECUTIVE DIRECTOR	MANAGING / SR. MANAGING DIRECTOR
RESPECT FOR DIVERSITY	*Acknowledges individual differences. Respects diverse perspectives. Encourages collaboration among team members.*	*Actively promotes diversity awareness. Facilitates discussions on diverse viewpoints. Encourages inclusivity within the team.*	*Promotes diversity in expertise. Addresses and resolves differences in opinions. Cultivates an inclusive team culture.*	*Actively promotes diversity. Resolves conflicts arising from diverse ideas. Fosters a collaborative and inclusive team environment.*	*Advocates for diversity in leadership. Proactively resolves conflicts within the team. Ensures an inclusive team culture.*	*Promotes diversity awareness across functions. Resolves conflicts arising from diverse perspectives. Cultivates inclusivity organization-wide.*	*Advocates for diversity in leadership roles. Addresses and resolves conflicts at a segment level. Fosters an inclusive culture within the segment.*	*Promotes diversity awareness at an organizational level. Resolves conflicts arising from diverse viewpoints. Cultivates inclusivity organization-wide.*	*Advocates for diversity in leadership across the industry. Addresses and resolves conflicts at an industry level. Fosters an inclusive culture industry-wide.*
ACCOUNTABILITY and TRANSPARENCY	*Takes responsibility for assigned tasks. Provides clear explanations for decisions. Delivers on individual commitments.*	*Takes ownership of collaborative tasks. Ensures transparency in decision-making. Delivers on commitments to the team.*	*Takes responsibility for specialized tasks. Ensures transparency in specialized decisions. Delivers on commitments to the functional area.*	*Takes ownership of team responsibilities. Ensures transparency within the team. Delivers on commitments within the team's scope.*	*Takes responsibility for the team's performance. Ensures transparency in team decisions. Delivers on commitments to the department.*	*Takes ownership of departmental responsibilities. Ensures transparency within the department. Delivers on commitments to the organization.*	*Takes responsibility for segment-level initiatives. Ensures transparency within the segment. Delivers on commitments at the segment level.*	*Takes ownership of organizational initiatives. Ensures transparency within the organization. Delivers on commitments at an organizational level.*	*Takes responsibility for industry-level initiatives. Ensures transparency within the industry. Delivers on commitments at an industry-wide level.*
PROFESSIONALISM and INTEGRITY	*Demonstrates personal integrity in daily tasks. Adheres to basic professional standards. Commits to ethical conduct in assigned work.*	*Fosters ethical behavior within collaborative efforts. Adheres to professional standards relevant to their role. Upholds integrity in collaborative tasks.*	*Cultivates an ethical culture within the specialized domain. Adheres to relevant professional standards. Demonstrates integrity in specialized work.*	*Contributes to a culture of ethics within the team. Adheres to team-specific professional standards. Demonstrates integrity in team collaborations.*	*Promotes ethical behavior within the department. Adheres to managerial and professional standards. Demonstrates integrity in departmental decisions.*	*Nurtures an ethical culture within the organization. Adheres to organizational and professional standards. Upholds integrity in organizational decisions.*	*Establishes ethical standards within the segment. Adheres to segment-specific professional standards. Demonstrates integrity in segment-level decisions.*	*Instills an ethical culture within the organization. Adheres to organizational and industry-specific standards. Upholds integrity in organizational and industry decisions.*	*Champions ethics within the industry. Adheres to industry-specific professional standards. Demonstrates integrity in industry-level decisions.*

LEADERSHIP COMPETENCY MATRIX (7/8)

LEADERSHIP COMPETENCY	STAFF	SENIOR STAFF	SPECIALIST / ANALYST	ASSOCIATE / SENIOR ANALYST	MANAGER	SENIOR MANAGER	ASSOCIATE DIRECTOR	EXECUTIVE DIRECTOR	MANAGING / SR. MANAGING DIRECTOR
RESILIENCE	*Maintains focus on assigned tasks despite challenges. Demonstrates persistence in routine activities. Adapts to minor changes in work environment.*	*Stays focused on broader business priorities. Displays persistence in achieving team goals. Adapts to changes in work processes.*	*Maintains focus on specialized business priorities. Persists in overcoming challenges in their expertise. Adapts to changes in specialized tasks.*	*Stays focused on team and departmental priorities. Displays persistence in achieving team objectives. Adapts to changes within the team.*	*Maintains focus on departmental and team goals. Persists in achieving managerial objectives. Adapts to changes in departmental processes.*	*Stays focused on organizational priorities. Displays persistence in organizational initiatives. Adapts to changes in organizational strategies.*	*Maintains focus on segment-level priorities. Persists in achieving segment-level objectives. Adapts to changes within the segment.*	*Stays focused on organizational priorities. Displays persistence in organizational endeavors. Adapts to changes in organizational strategies.*	*Maintains focus on industry-level priorities. Persists in achieving industry-level objectives. Adapts to changes within the industry.*
COMMUNICATION and INFLUENCE	*Expresses ideas clearly within the immediate team. Shares important information within the team. Inspires colleagues to meet basic expectations.*	*Clearly communicates ideas to a broader audience. Disseminates important information within the department. Inspires team members to exceed standard expectations.*	*Expresses specialized ideas clearly to peers. Shares crucial information within the specialization. Inspires colleagues to excel in their specialized roles.*	*Clearly communicates ideas within the team and department. Disseminates critical information within the team. Inspires team members to surpass regular expectations.*	*Communicates ideas clearly within the department. Disseminates important information to the team. Inspires team members to exceed managerial expectations.*	*Clearly communicates ideas across organizational levels. Disseminates crucial information within the organization. Inspires team members to excel in organizational goals.*	*Expresses ideas clearly within the segment. Shares important information within the segment. Inspires segment members to surpass expectations.*	*Clearly communicates ideas across organizational levels. Disseminates critical information within the organization. Inspires organizational members to excel.*	*Communicates ideas clearly across industry levels. Disseminates crucial information within the industry. Inspires industry members to surpass expectations.*
SELF-MASTERY	*Acknowledges personal strengths and weaknesses. Works on improving basic job-related skills. Shows openness to feedback for self-improvement.*	*Recognizes and leverages individual strengths. Actively works on improving weaknesses. Seeks feedback to enhance performance and self-awareness.*	*Identifies and maximizes specialized strengths. Invests in targeted skill improvement. Actively seeks feedback for continuous growth.*	*Acknowledges and utilizes team-related strengths. Works on refining individual weaknesses. Welcomes feedback for personal and team development.*	*Recognizes and leverages managerial strengths. Focuses on improving leadership skills. Seeks feedback to enhance managerial effectiveness.*	*Identifies and maximizes leadership strengths. Actively addresses leadership weaknesses. Proactively seeks feedback for continuous growth.*	*Recognizes and leverages segment-related strengths. Works on refining weaknesses within the segment. Welcomes feedback for personal and segment development.*	*Identifies and maximizes organizational strengths. Invests in addressing organizational weaknesses. Proactively seeks feedback for continuous growth.*	*Recognizes and leverages industry-related strengths. Works on refining weaknesses within the industry. Welcomes feedback for personal and industry development.*

LEADERSHIP COMPETENCY MATRIX (8/8)

LEADERSHIP COMPETENCY	STAFF	SENIOR STAFF	SPECIALIST / ANALYST	ASSOCIATE / SENIOR ANALYST	MANAGER	SENIOR MANAGER	ASSOCIATE DIRECTOR	EXECUTIVE DIRECTOR	MANAGING / SR. MANAGING DIRECTOR
PASSION	*Demonstrates enthusiasm for assigned tasks. Commits to completing responsibilities with dedication. Motivates others within the team to achieve basic goals.*	*Displays enthusiasm for the broader team's objectives. Commits to team goals with visible dedication. Inspires team members to excel in their roles.*	*Demonstrates passion for specialized projects or tasks. Commits to achieving excellence in specialized areas. Inspires colleagues within the specialization.*	*Displays enthusiasm for team objectives. Commits to team goals with visible dedication. Motivates team members to excel in their roles.*	*Demonstrates passion for departmental goals. Commits to achieving excellence within the department. Inspires team members to exceed managerial expectations.*	*Displays enthusiasm for organizational objectives. Commits to organizational goals with visible dedication. Inspires team members to excel in organizational goals.*	*Demonstrates passion for segment objectives. Commits to achieving excellence within the segment. Motivates segment members to surpass expectations.*	*Displays enthusiasm for organizational objectives. Commits to organizational goals with visible dedication. Inspires organizational members to excel.*	*Demonstrates passion for industry-wide objectives. Commits to achieving excellence within the industry. Inspires industry members to surpass expectations.*
MULTI-TASKING	*Manages basic tasks effectively. Demonstrates the ability to handle multiple responsibilities simultaneously. Maintains quality output across various responsibilities.*	*Takes on more complex tasks concurrently. Balances various responsibilities with consistent quality. Efficiently handles increased workload.*	*Manages specialized tasks concurrently. Maintains a high standard of output across diverse responsibilities. Demonstrates efficiency in handling complex roles.*	*Handles multiple responsibilities with increased complexity. Ensures quality output across various roles. Efficiently manages tasks that require specific expertise.*	*Manages multiple team responsibilities effectively. Balances leadership and operational tasks seamlessly. Ensures quality output in both managerial and operational roles.*	*Takes on strategic and operational roles simultaneously. Balances complex responsibilities with consistent high quality. Demonstrates efficiency in handling diverse managerial tasks.*	*Manages a segment with multiple and varied responsibilities. Ensures quality output across diverse roles within the segment. Efficiently handles responsibilities that impact the segment's success.*	*Handles organizational tasks with a broad scope. Balances strategic and operational responsibilities effectively. Maintains consistent high-quality output across diverse roles.*	*Manages industry-related tasks with a comprehensive approach. Balances strategic and operational responsibilities at the industry level. Ensures quality output that positively impacts the organization within the industry.*

THANK YOU