



# L&D Collaboration Call

## Tracking Employee Skills & Technical Competencies

3 November 2025

# KLR Role Expectations

- Progressive role expectations by level
- Levels are by skills not years
- Develop skills to prepare for next role
- Role expectations is the job
- Competencies how you get reviewed



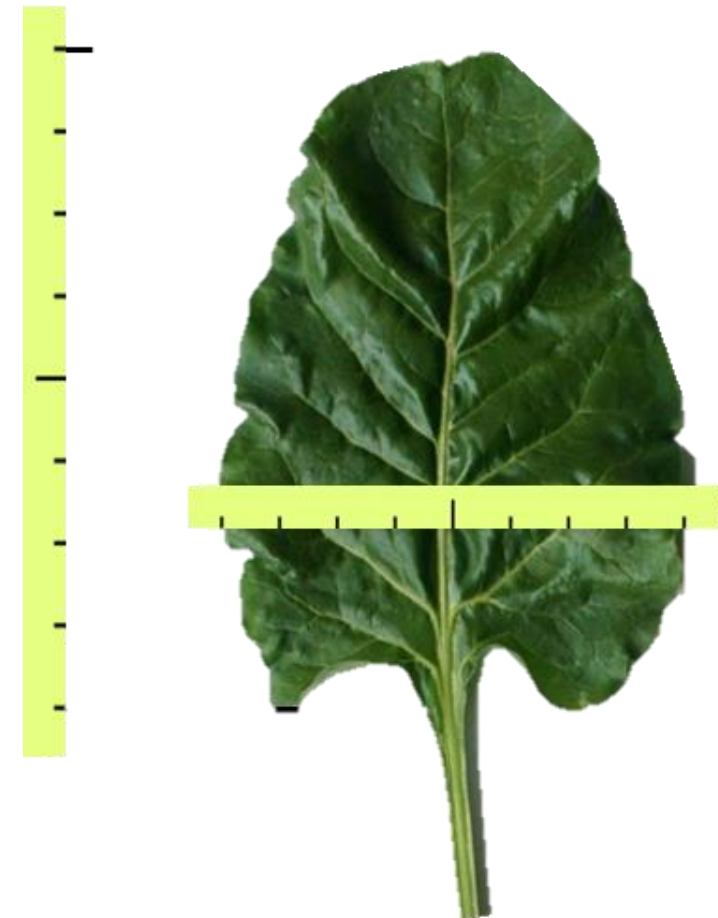


# KLR Competencies

- Client Service and Communication
- Developing Self and People Development
- Firm Economics
- Teamwork and Relationship Building
- Technical Excellence and Critical Thinking
- Initiative and Results Orientation
- Business Development
- Leadership

# KLR Rating Scale

- Exemplary
  - you are a role model in this behavior
  - performing significantly above expectations
- Strong
  - skilled in this behavior
  - performing above expectations
- Proficient
  - experienced in this behavior
  - performing as expected
- Developing
  - beginning to gain experience in this behavior
  - performing slightly below expectations
- Unsatisfactory
  - does not display this behavior
  - performing significantly below expectations



# KLR Example of Role Expectations v Competency

| Role Expectations                                                                                                                                                                     | Performance Competencies                                                                                                                                                                                                                                     |                                                                                                                                               |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------|
| Audit Associate I                                                                                                                                                                     | Associate                                                                                                                                                                                                                                                    |                                                                                                                                               |
| Intern Expectations should be met                                                                                                                                                     | <b>Technical Excellence &amp; Critical Thinking:</b><br><br>Applies knowledge and skills to perform work for internal and external clients, demonstrating logical thinking and sound reasoning by using facts and data to solve problems and make decisions. | Proficiently understands and applies all technical requirements of an associate conducting thorough research to answer questions when needed. |
| Assist in preparation of assigned engagement work within defined timeframes and communicate with supervisor if tasks cannot be completed within expected timeframe                    |                                                                                                                                                                                                                                                              | Seeks to minimize review comments and completes self review of work.                                                                          |
| Take ownership of workpapers completed. If testing support is still needed to complete assigned work, communicate what is needed to in-charge so it can be addressed with the client. |                                                                                                                                                                                                                                                              | Promptly notifies others of problems and roadblocks while developing problem solving and conflict resolution skills.                          |

# Clark Nuber

## Skills Tracker

- Task based
- Self-assessment (Basic) and Manager endorsements (Advanced)
- Used by Schedulers for assigning work
- Used by Department Leaders for promotions

## Core Competencies

- Audit, Tax, ACS Focus Groups to develop and select competencies
- Sessions to rollout and explain
- Updated firmwide Expectations Grid with Competencies
- Incorporated Leadership Pipeline Concepts
- Adding Operations in 2026

# Anders Core Competencies - Measuring the "What"

- Technical Expertise/Personal Effectiveness
  - Leadership
  - Personal/Staff/Team Development
  - Client Service
  - Practice Development
  - Productivity
- Core Competency groups consistent across firm
  - Performance expectations vary by role

# Anders Behavioral Expectations – Measuring the "**How**"

- Character
  - Empowerment
  - Generosity
  - Welcoming
  - Transparency
  - Originality
  - Collaboration
- Aligned to Core Values
  - Expectations vary by Career Level



ORIGINALITY

| Level                         | Skill                                  | What it looks like in action                                                                         |
|-------------------------------|----------------------------------------|------------------------------------------------------------------------------------------------------|
| Entry Level (A1 – IC1)        | <i>Curiosity</i>                       | • Asks questions to understand processes and methodologies used in their department                  |
|                               | <i>Adaptability</i>                    | • Shows willingness to try new approaches to tasks as suggested by supervisors                       |
| Intermediate Level (A2 – IC2) | <i>Process Improvement</i>             | • Suggests small-scale improvements to team workflows                                                |
|                               | <i>Creative Problem-solving</i>        | • Applies creative thinking to overcome routine obstacles in client engagements                      |
| Mid Level (A3 – IC3)          | <i>Identifies Innovative Solutions</i> | • Develops creative approaches to client problems, drawing on interdisciplinary knowledge            |
|                               | <i>Analyzes Trends</i>                 | • Identifies emerging trends in the industry and proposes ways to leverage them for client benefit   |
| Advanced Level (A4 – IC4)     | <i>Thought Leadership</i>              | • Publishes blogs or speaks at industry events, showcasing innovative ideas in their field           |
|                               | <i>Disruptive Innovation</i>           | • Challenges traditional industry practices, proposing and implementing innovative service offerings |

