# System/Competency Analysis
# Step by Step Guide

**ADVISOR Enterprise User's Guide**


Latest Update: August 21, 2020



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# Foreword

ADVISOR Enterprise is a Training Management System that drives training efficiency by (a) aligning current and future training activities to operational requirements to identify gaps, duplications and training with minimal value; (b) forecasting and comparing the costs of viable delivery options; (c) uncovering cost drivers; and (d) improving resource allocation. ADVISOR is built around the ADDIE model with the added flexibility of starting the analysis at any level. ADVISOR is made up of the following modules that can be used separately or in any combination.

| | |
|---|---|
| **Needs Assessment** | **A**ssess: To find out "*the cause of the problem and potential solutions*". Provides a step by step approach for understanding a problem before selecting the solution – in other words, before assuming that training is needed. Needs Assessment provides an audit trail and serves as the foundation for decisions by zeroing in on the source of the problem, identifying solutions that can produce the desired level of productivity, and highlighting actions that will generate the greatest impact. [Scope and Needs Assessment]. |
| **Training Analysis** | **A**nalysis: To find out "*who needs to be trained, on what and why*". Provides a step by step approach for conducting Training Needs Analysis (TNA) or Training Systems Requirements Analysis (TSRA) to identify training needed by each job, position and employee to perform duties to the desired standard under the prescribed conditions. Four approaches may be used to conduct training analysis, namely Mission, System, Competency or Job. [Mission Analysis, Competency Analysis, System Analysis, Job Task Analysis, Knowledge/Skill Gap Analysis and Training Requirements Analysis]. |
| **Training Design** | **D**esign: To find out "*what is the most effective and economical way to deliver training*". Provides a step by step approach for conducting Training Media Analysis (TMA) or Option Analysis to identify the most cost effective strategy for the delivery of training and generates Training Plans. The analysis takes into account limitations, instructional design requirements, upfront and recurring costs over training program life as well as risks associated with the introduction of new technology. [Media Analysis, Cost Analysis and Training Plans]. |
| **Fidelity Analysis** | **D**evelop: To find out the "*fidelity requirements of training devices*". Provides a step by step approach for assessing the functional requirements of trainers and simulators based on training needs and performance objectives. It identifies visual, tactile, olfactory, affective and auditory sensory cues needed to practice tasks, within realistic environments, under preset conditions to attain the desired level of competency. In addition, ADVISOR takes into account elements within the virtual world and how users interact with each. |
| **Resource Management** | **I**mplementation: To find out "*how much money and resources are needed*". Compiles and analyzes missions/goals, competencies, systems, jobs, tasks, training requirements, courses, activities, costs, personnel and resources to generate concise, up to date and actionable reports. The reports provide insight on planned training activities for any time period; training requirements for each job/employee; budget, personnel and resource requirements, training impact as well as how to drive training effectiveness and efficiency by leveraging technology, improving resource allocation and identifying gaps, duplications and unwarranted training. [Forecast and Optimize Training Budgets, Personnel and Resources]. |
| **Project Management** | **I**mplementation: To find out "*how training should be implemented*". Provides a step by step approach for planning a project and tracking progress in real time. This includes the setup of phases and tasks, dependencies and constraints, timelines as well as the assignment of personnel and resources needed to complete. Moreover, ADVISOR tracks progress by comparing hours worked and money spent on each task to project plan, to anticipate delays, facilitate the implementation of corrective measures, and keep projects on-time and within budget. [Develop Project Plans and Track Progress]. |

| | |
|---|---|
| **Performance Analysis** | **E**valuation: To find out "*how training impacts performance and organizational goals*". Provides a step by step approach for improving performance by zeroing in on the source of the problem and identifying solutions that can produce the desired level of productivity. Moreover, ADVISOR highlights actions that will generate the greatest impact by assessing the feasibility of implementing plausible solutions as well as forecasting the costs, benefits and Return on Investment (ROI) of each intervention. [Performance Gap Analysis, Root Cause Analysis and Cost Benefit Analysis]. |
| **Training Life Cycle Management** | **M**anage: To "*continually uncover venues to drive training effectiveness & efficiency*". Maintains training effectiveness and efficiency over time by continually assessing the impact of changes to missions, jobs, tasks, systems, policies, technologies, throughput, and so forth on training content and activities; as well as budget, personnel and resource requirements. This is attained through a digital-twin model that continually aligns training activities to operational requirements to identify gaps, duplications and training with minimal value. Results (personnel/resource requirements for any time period; cost drivers; bottlenecks and deficiencies) are quickly and concisely communicated through dashboards. Actions that drive training effectiveness and efficiency are also highlighted. |

# TABLE OF CONTENTS

# Chapter 1: Setup Projects

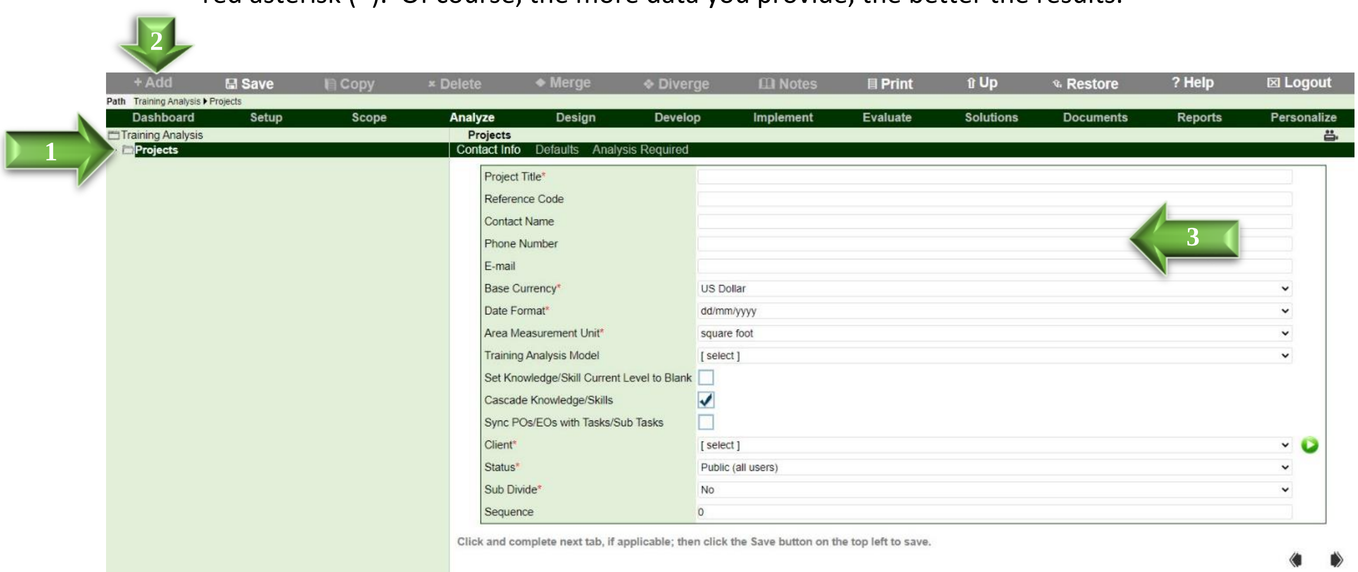
## 1.1 Introduction

ADVISOR is highly flexible. Based on project requirements, the analysis may start by examining Missions/ Goals, Systems, Competencies, Jobs or combinations.  The current guide presents a step-by-step process to assist analysts in conducting System/Competency Analysis, Job Analysis and Task Analysis to identify training requirements.  Separate Step-by-Step Guides are available for conducting Mission Analysis and Job Analysis, and therefore they will not be explicitly covered in this Step by Step Guide.  For details, on all analysis covered by ADVISOR Enterprise, please refer to the Training Analysis User Guide.  For info on basic functionality and how to configure ADVISOR in line with needs, please refer to the Configure ADVISOR Step by Step or User Guide.  Remember that context sensitive help for each screen is also available by clicking on [**Help**].

## 1.2 Setup New Projects

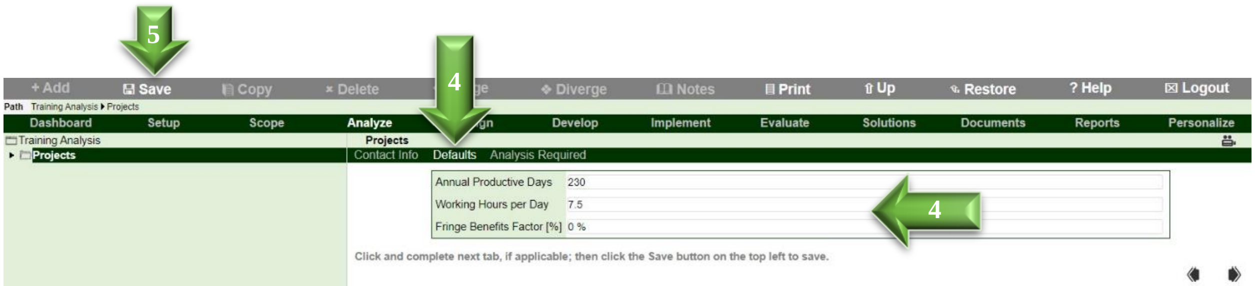
To create a new Project:

Step 1: Click on the Projects folder.
Step 2: Click [**Add**].
Step 3: Input the Project Title, Contact Name and other info.  Data required by ADVISOR is identified by a red asterisk (*).  Of course, the more data you provide, the better the results.



**Step 4**: Click on the [**Defaults**] tab to specify Annual Productive days, Working Hours per Day and Fringe Benefits Factor for the project. The Currency and Inflation Rate will cascade from the Client settings.

Implication: Inflation Rates can greatly impact the cost of courses over time. Other default values can improve consistency and save time by populating the corresponding values in new projects.




**Step 5**: Click [**Save**], once all relevant fields are filled out to create the project.

Notes:

- To edit an existing project, click on the **Projects** folder then click on the project's name. Make the required changes and click [**Save**].
- You may also share your analysis with colleagues (i.e., Users assigned to the same Client) by clicking on the [**Sharing**] tab, placing checkmarks next to their names and clicking [**Save**].

## 1.3 Configure Projects

To preserve consistency, all configurations including data to be collected, analysis to be conducted, and reports to be generated cascade from Client's Setup (See Configure ADVISOR Step-by-Step Guide). To modify the configuration for a specific project:

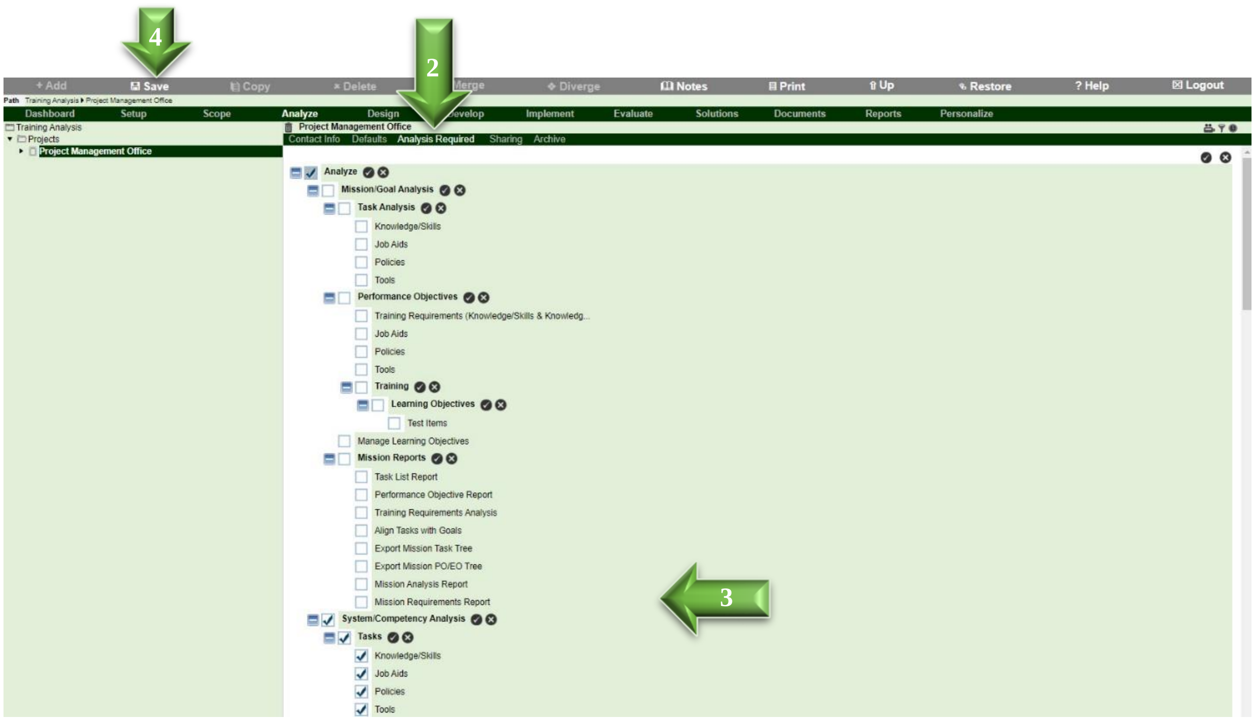
**Step 1:** Click on the icon to turn the cascade off.

**Step 2**: To specify data to be collected and analysis to be performed click on the [**Analysis Required**] tab.

**Step 3**: Place checkmarks next to the required items. Deselected items indicate that the analysis and data are not needed. ADVISOR will, in-turn, automatically hide nodes, tabs and fields that are no longer required, streamline data collection and reduce time required to conduct the analysis – a very effective way to configure ADVISOR in line with your needs.

**Step 4**: Click [**Save**] to save the configuration.

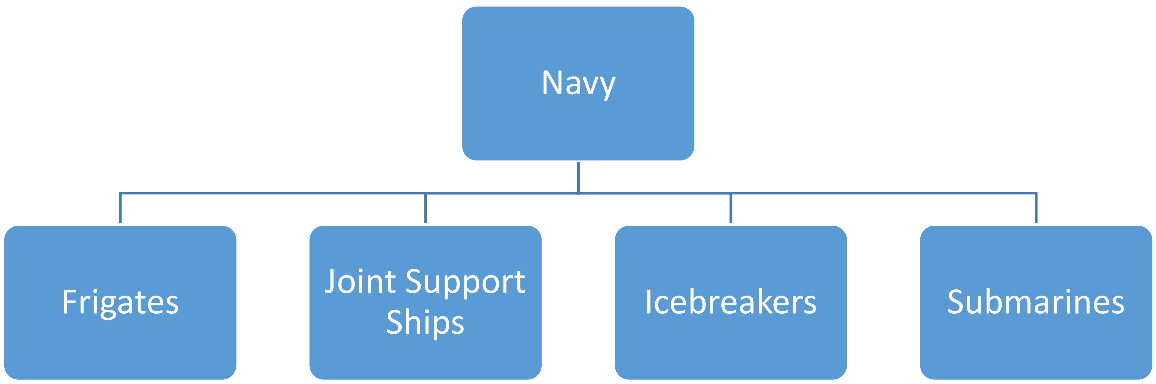
For example, if System Analysis is needed but Mission/Goal Analysis is not required, all checkmarks for Mission/Goal related items should be removed, as shown below. You may, of course, reinstate the Mission Analysis requirement at any time, as the need arises.




Implication: All fields corresponding to data and analysis not required will be automatically hidden for this project. This will in-turn streamline the interface and reduce time needed to conduct the analysis.

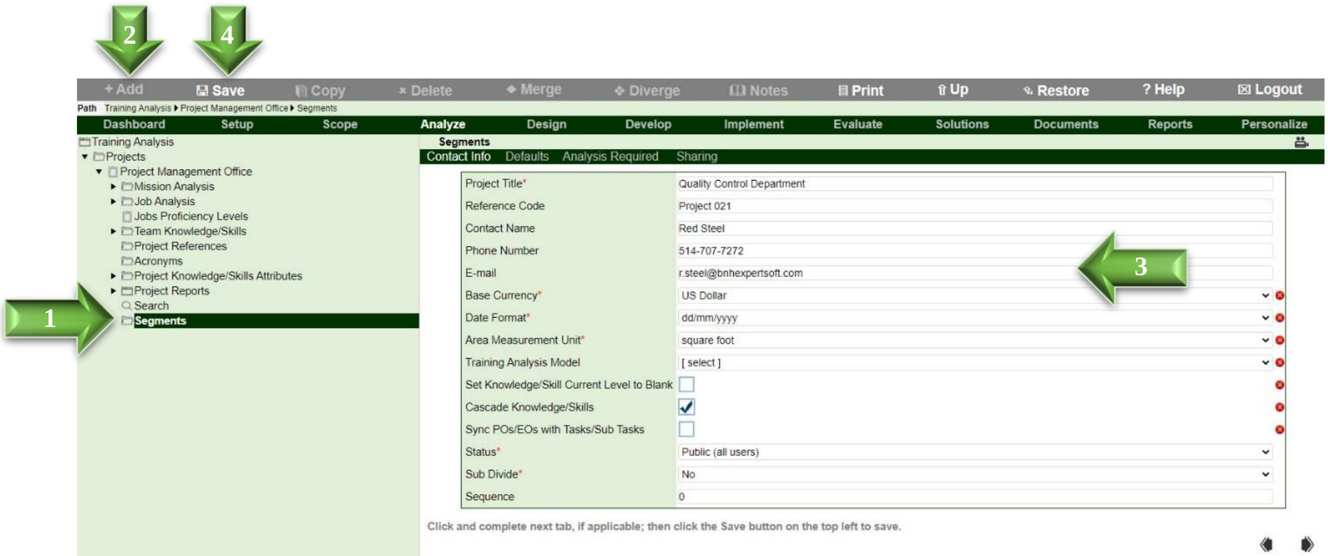
## 1.4 Setup Project Segments

You may also subdivide and organize the data under each project in various segments, if needed. For example, if the project entails the assessment of training requirements within multiple units, departments, commands or platforms, you may subdivide the project into segments and sub segments, and organize the data accordingly. For example, a corporation (project) may be divided into the following segments: Sales, Marketing, IT, Operations and so forth. A Navy (project) may be subdivided into the following segments: Frigates, Joint Support Ships, Ice Breakers, Submarines, and so forth. Moreover, the impact of missions/goals within each segment (unit) on parent (organization) can also be defined.



To set-up a Segment for a Project:

**Step 1**: Click on the **Segments** folder under the **Projects** folder.
**Step 2**: Click [**Add**].
**Step 3**: Input the Project (Segment) Title, Contact Name and other information.
**Step 4**: Click [**Save**] to create the Segment.



# Chapter 2: Setup Systems/Competencies

## 2.1 Overview

**Systems**

Job requirements in many cases are directly related to the Systems that individuals operate and maintain. For example, the Tasks, as well as Knowledge/Skill requirements for heavy equipment, truck and forklift drivers and technicians are highly dependent on those vehicles. The same is true for aircraft pilots and technicians, crew onboard ships, and so forth. If multiple jobs operate the same Communication System, for example, we can preserve consistency, drive efficiency and maintain alignment with future system updates by defining the Tasks and Knowledge/Skill requirements once (under the Communication System) and assign them to relevant Jobs. In other words, if Job performance is highly dependent on Systems or Sub Systems, and multiple Jobs operate or maintain the same System or Sub System, then the Systems based analysis approach will yield the best results.

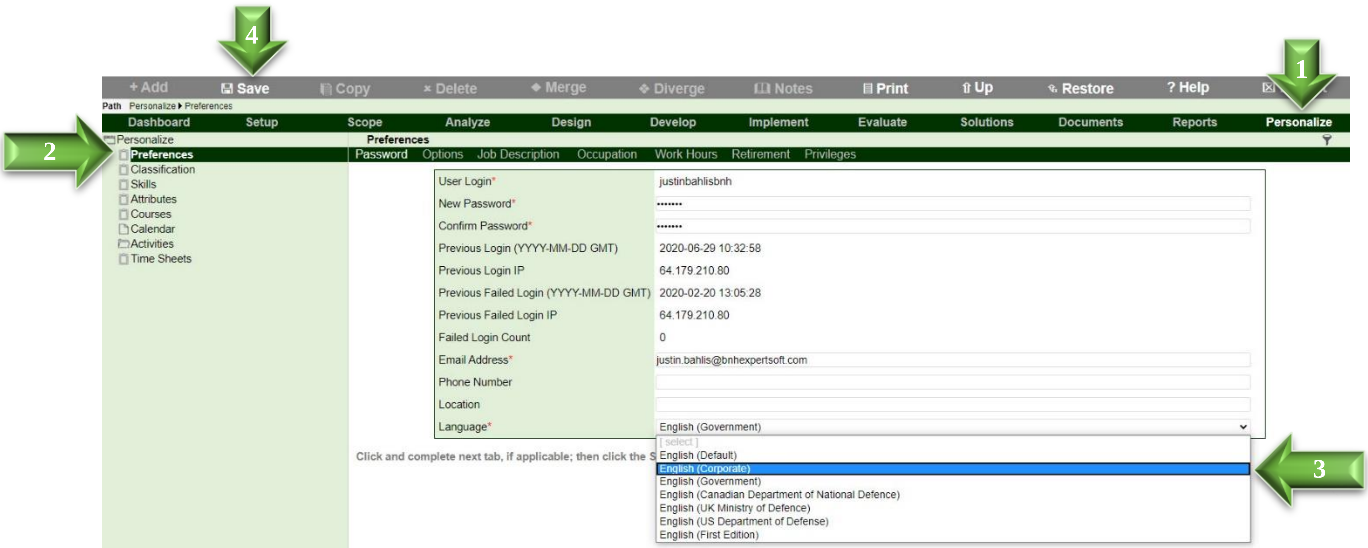
**Competencies**

Competencies are defined as the ability to perform a particular function successfully. Competencies can be core/behavioral (such as, dependability, reliability, team work or problem solving, etc.); or technical – i.e., domain specific. Technical competencies for project managers, may include Time Management, Cost Management, Oral/Written Communication, and so forth. Each technical competency can be further divided into observable/measurable behaviors (indicators of competence), and each Job level will be expected to demonstrate a specific competence level. Since multiple jobs within an organization will most likely require similar competencies, we can preserve consistency, drive efficiency and quickly identify competencies needed to advance to the next level or change jobs by defining the behaviors (equivalent to Tasks with Standards) once (under each competency) and assign them to relevant Jobs.

Since the core requirements for Systems and Competencies are similar, the same ADVISOR functions are used to analyze both by allowing users to change the taxonomy as follows:

To modify the ADVISOR taxonomy (between System and Competency):

**Step 1:** Click on the Personalize Tab.
**Step 2:** Click **Preferences** node under the **Personalize** folder.
**Step 3:** Select English (Corporate) or English (Government) to switch taxonomy to Competency. Other options will default to System.
**Step 4:** Click [**Save**].

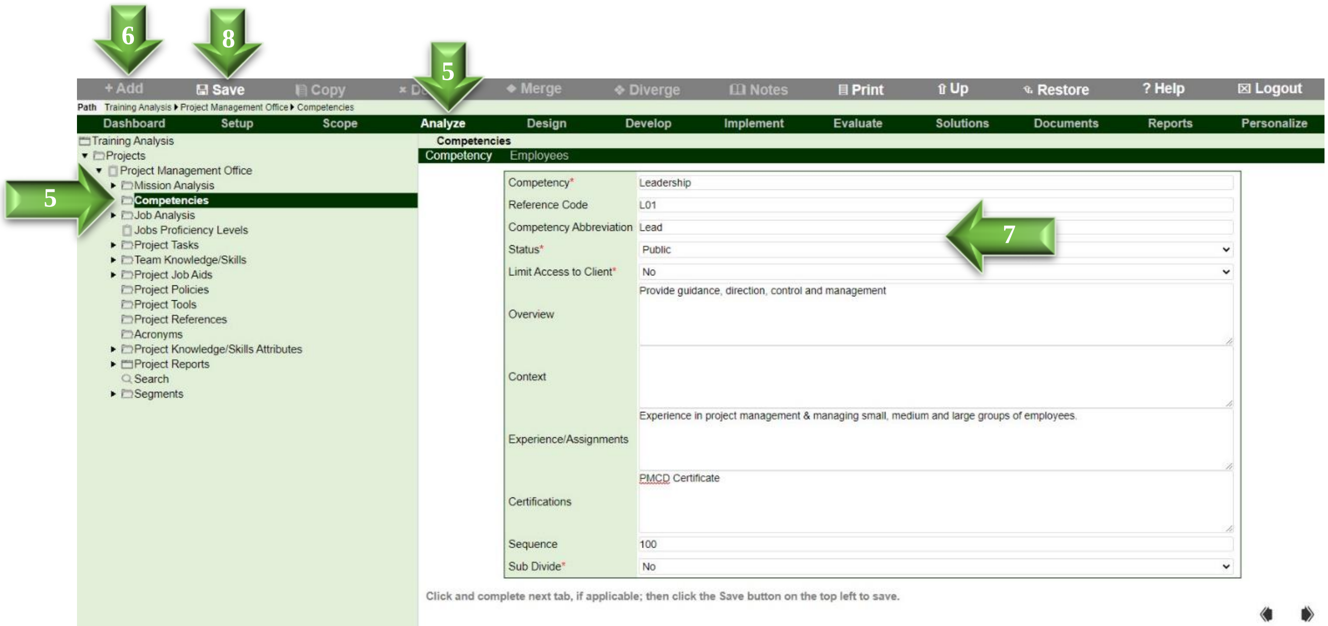



Note:

➢ To avoid redundancy, the remainder of this Step by Step guide will illustrate how Competency Analysis is conducted.

To define a competency:

**Step 5**: Click on the Competencies folder, under the [**Analyze**] Tab.
**Step 6**: Click [**Add**].
**Step 7**: Input the Competency Title, a brief overview as well as other relevant data.
**Step 8**: Click [**Save**] to create the competency.




Notes:

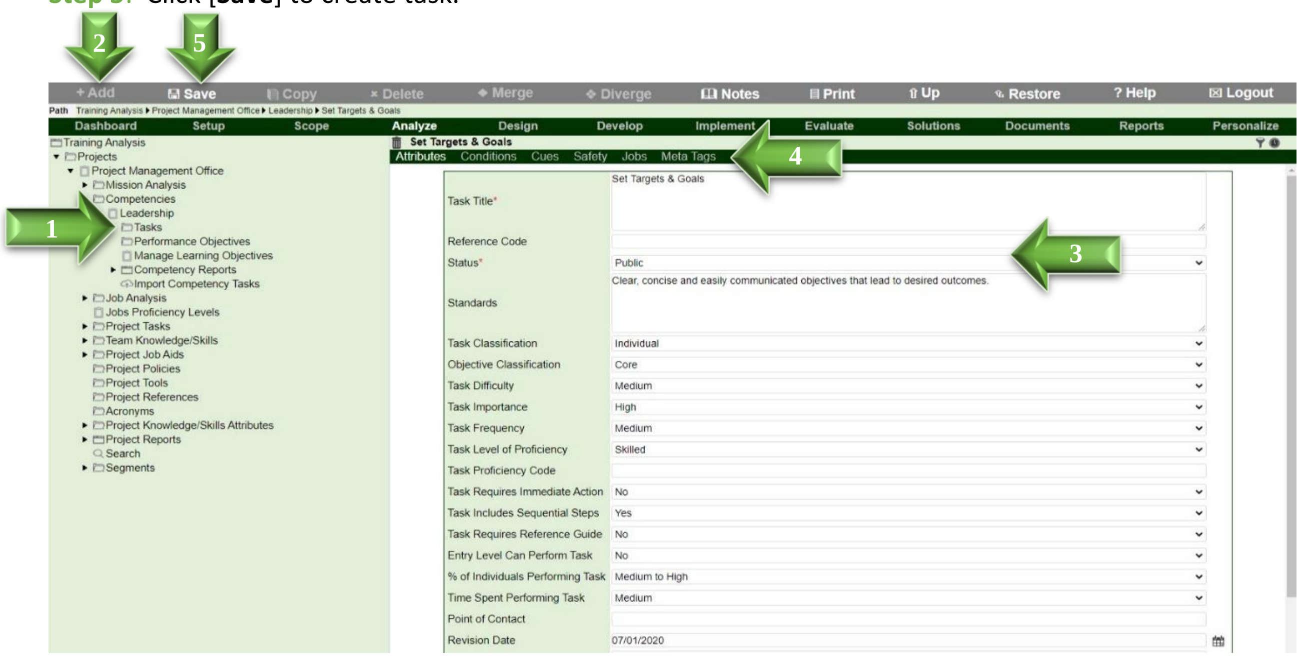
- ➢ To identify which employees require the Competency, click the [**Employees**] Tab, place checkmarks next to the desired employees and click [**Save**]. The list of employees is comprised of both User Accounts and Project Accounts that are classified as employees of the Client. Once the analysis is complete Training Requirements for Each Employee report can be generated under the [**Reports**] tab.

- ➢ Subdivide Competencies: Competencies can be divided into Competency Areas. For example, Leadership Competency can be further divided into the following Areas: Decisiveness, Developing Others, Team Building, etc.

## 2.2 Setup System/Competency Tasks

To create a new task (behavior):

**Step 1:** Click on the Tasks folder under the (competency) node or (competency area) node.
**Step 2:** Click [**Add**].
**Step 3:** Input the Task Title, Standard, Difficulty, Importance, Frequency, Proficiency as well as other attributes.
**Step 4:** Next, click on the [**Conditions**], [**Cues**] and [**Safety**] tabs and complete.
**Step 5:** Click [**Save**] to create task.



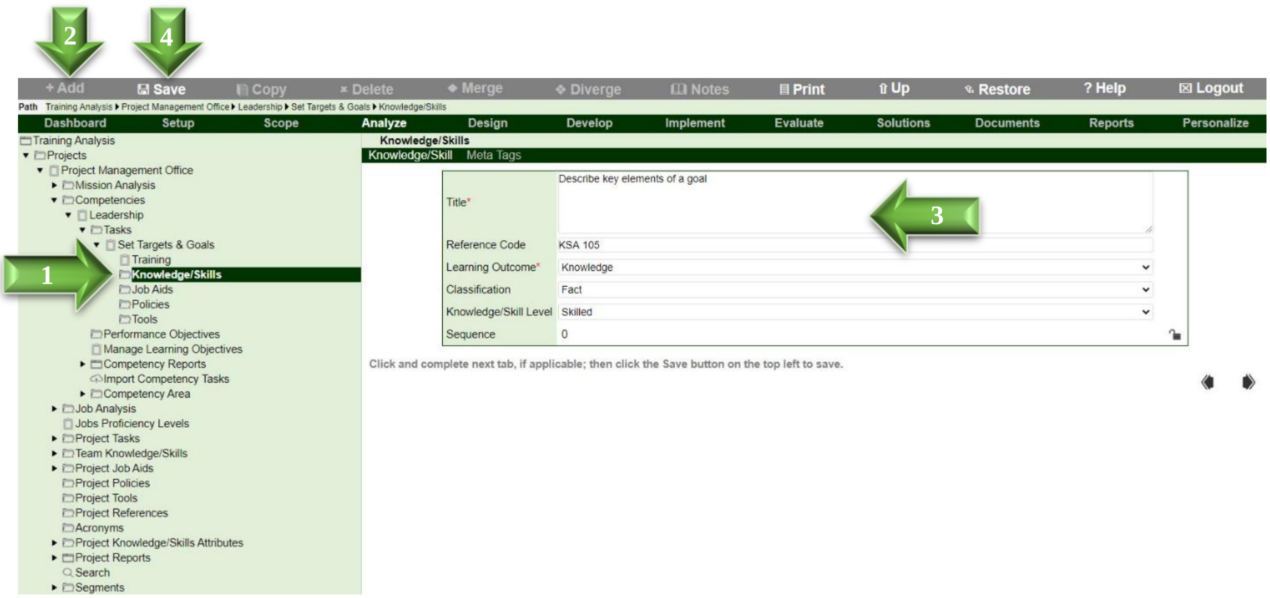

Notes:

- Based on Task's Difficulty, Importance and Frequency (DIF), Task Priority and Training Requirements are determined and presented under the Training node under each (task). You may of course, override system's recommendations.
- Sub Divide Tasks: A Task can also be divided into Sub Tasks, Steps and Sub Steps. Each Task can only be assigned as a single unit (including all Sub Tasks) to a single Competency. In other words, if a Task is divided into Sub Task A and Sub Task B, you cannot assign Sub Task A to Leadership Competency for example, and Sub Task B to General Competency.
- Search. To facilitate the analysis, a [**Search**] tab is presented on the Tasks folder. You can search for Tasks by Mission, System, Competency, Job or Keyword. To copy, place checkmarks next to the desired Tasks and click [**Save**]. All Sub Tasks as well as Knowledge and Skills associated with the selected Task are also copied.
- If References have been defined under the Project References folder (Chapter 6 of Training Analysis User Guide), a [**Reference**] tab will also appear after the [**Safety**] tab. Click the [**References**] Tab, select References and click [**Save**] to link Tasks to specific mandate, requirement, manual, etc., and in-turn document the reasoning behind the Task.

## 2.3 Identify Knowledge, Skills and Attitudes (KSAs)

To identify knowledge, skills and attitudes needed to perform the Task to the desired level:

**Step 1**: Click on the **Knowledge/Skills** folder under the **(task)**.
**Step 2**: Click [**Add**].
**Step 3**: Input the Knowledge, Skill or Attitude title, Learning Outcome, Classification and Knowledge/Skill Level.
**Step 4**: Click [**Save**] to create.




Notes:

- Identifying knowledge, skill and attitude requirements for each Task will greatly simplify the process of uncovering knowledge/skill gaps – i.e., training needed.

- Each time a Knowledge, Skill or Attitude is added, they are automatically compiled under the **Team Knowledge/Skills** folders.

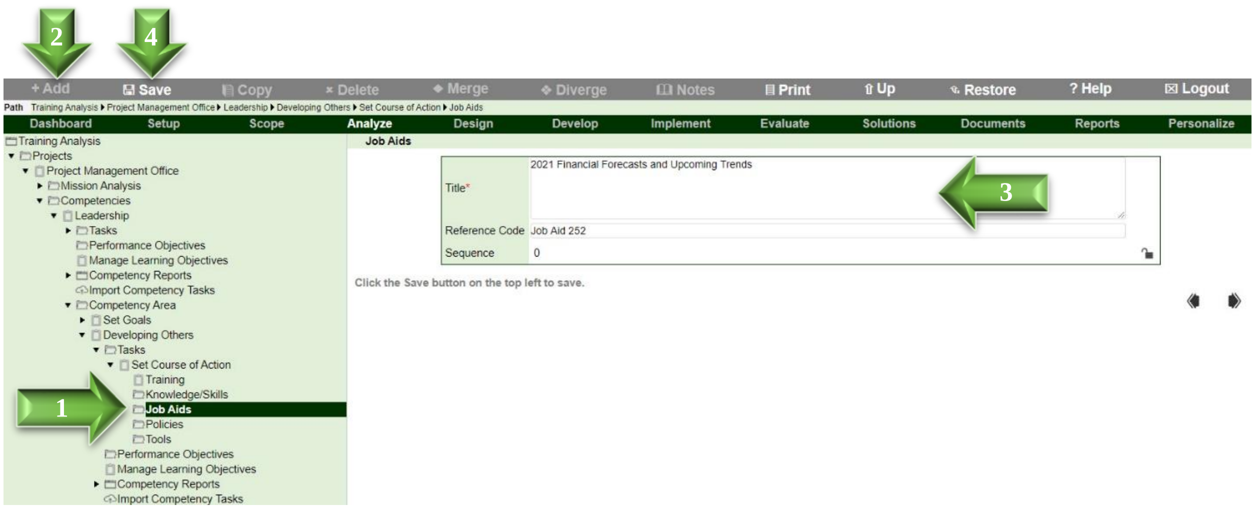
- To minimize duplication, in lieu of adding knowledge or skills, user may review Knowledge, Skills or Attitudes under **Team Knowledge/Skills** folder by clicking on the [**Select**] tab under **Knowledge/Skills** folder, placing checkmark next to the required Knowledge/Skills and clicking [**Save**] to add under the Task.

## 2.4 Define Job Aids, Policies and Tools

### Job Aids

To identify job aids needed to perform Tasks:

Step 1: Click on the Job Aids folder.
Step 2: Click [**Add**].
Step 3: Input the job aid title, description and other required information.
Step 4: Click [**Save**].



Note:

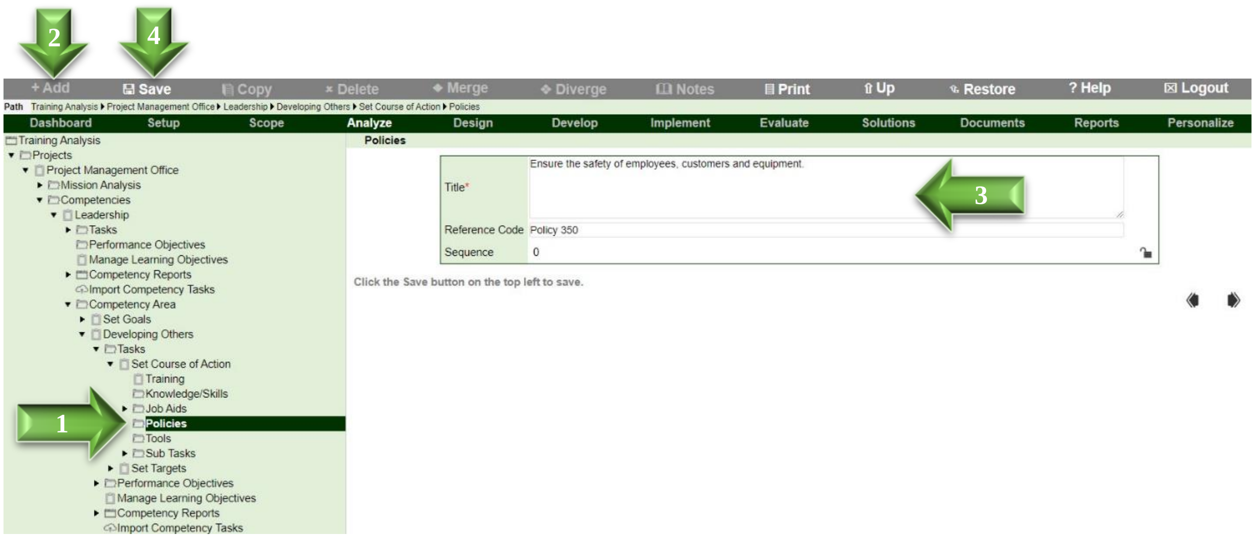
- Similar to Knowledge/Skills, each time a Job Aid is added, they are automatically compiled under the Project Job Aids folder.

- To minimize duplication, in lieu of adding job aids, user may review Job Aids under Project Job Aids folder by clicking on the [**Select**] tab under Job Aids folder, placing checkmarks next to the required Job Aids and clicking [**Save**] to add under the Task or Performance Objective.

**Policies/Procedures**

To identify policies and procedures needed to perform Tasks:

Step 1: Click on the Policies folder.
Step 2: Click [**Add**].
Step 3: Input the policy title, description and other required information.
Step 4: Click [**Save**].



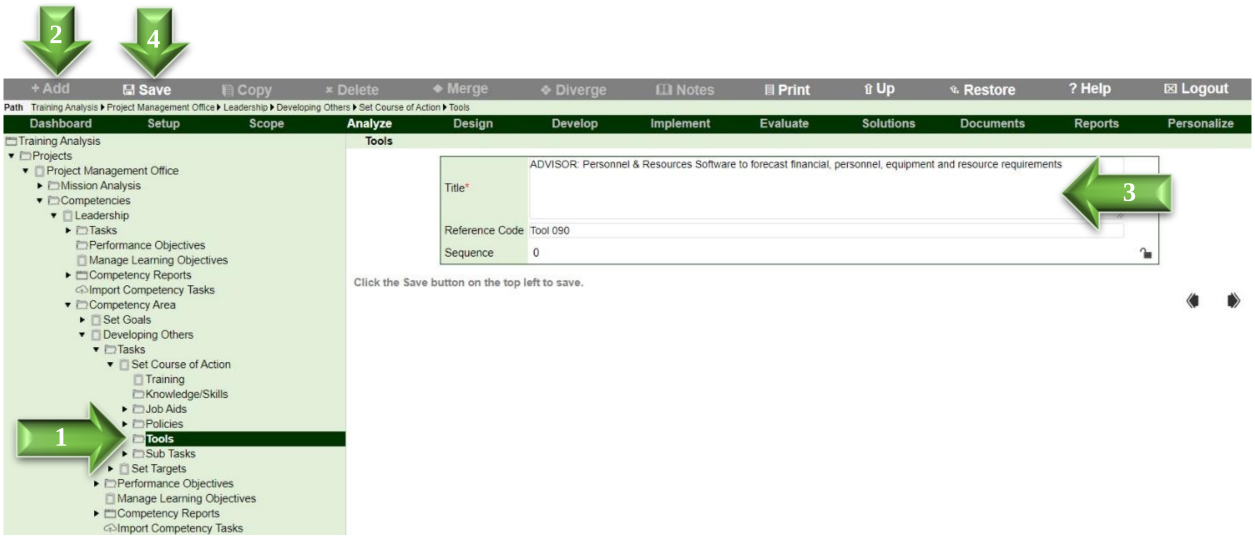

Note:

- Similarly, when a Policy is added, it is automatically compiled under the Project Policies folder.
- To minimize duplication, in lieu of adding policies, user may review Policies under Project Policies folder by clicking on the [**Select**] tab under Policies/Procedures folder, placing checkmarks next to the required Policies and clicking [**Save**] to add under the Task or Performance Objective.

## Tools

To identify tools needed to perform Tasks:

**Step 1**: Click on the **Tools** folder.
**Step 2**: Click [**Add**].
**Step 3**: Input the tool title, description and other required information.
**Step 4**: Click [**Save**].




Note:

- Similarly, when a Tool is added, it is automatically compiled under the **Project Tools** folder.

- To minimize duplication, in lieu of adding tools, user may review Tools under **Project Tools** folder by clicking on the [**Select**] tab under **Tools** folder, placing checkmarks next to the required Tools and clicking [**Save**] to add under the Task or Performance Objective.

## 2.5 Define Performance and Enabling Objectives

Tasks refer to activities that individuals are expected to perform within a competency. Although individuals may require training on some Tasks in order to master, simpler Tasks with minimal impact may not require any training. In general, Performance Objectives can be viewed as Tasks that require training.

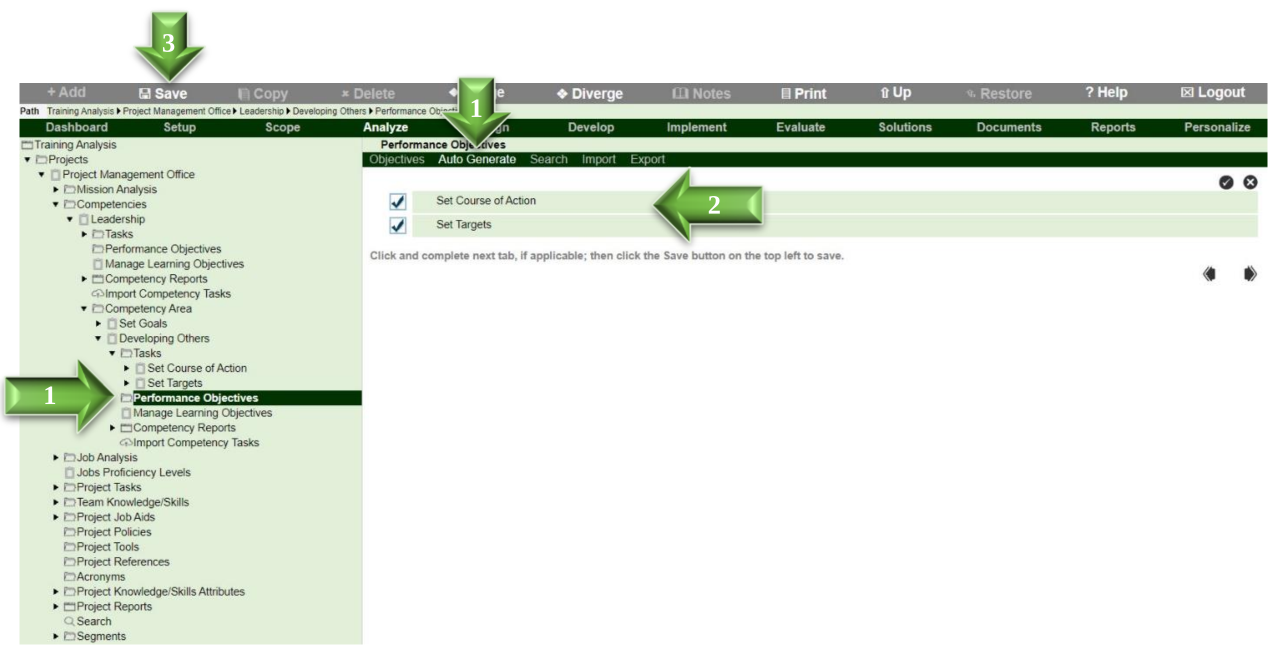
**Auto Generate Performance Objectives**

To facilitate the creation of Performance and Enabling Objectives, Competency Tasks are presented under the [**Auto Generate**] tab under the Performance Objectives folder. To create:

Step 1: Click on the [**Auto Generate**] tab.

Step 2: Place checkmarks next to Tasks that require training.

Step 3: Click [**Save**] to automatically generate the corresponding Performance Objectives under the Performance Objectives folder. Sub Tasks are in-turn translated into Enabling Objectives. In addition to cascading the attributes of each Task and Sub Task to the corresponding Performance and Enabling Objectives, associated Knowledge, Skills, Job Aids, Policies and tools will also be transposed.



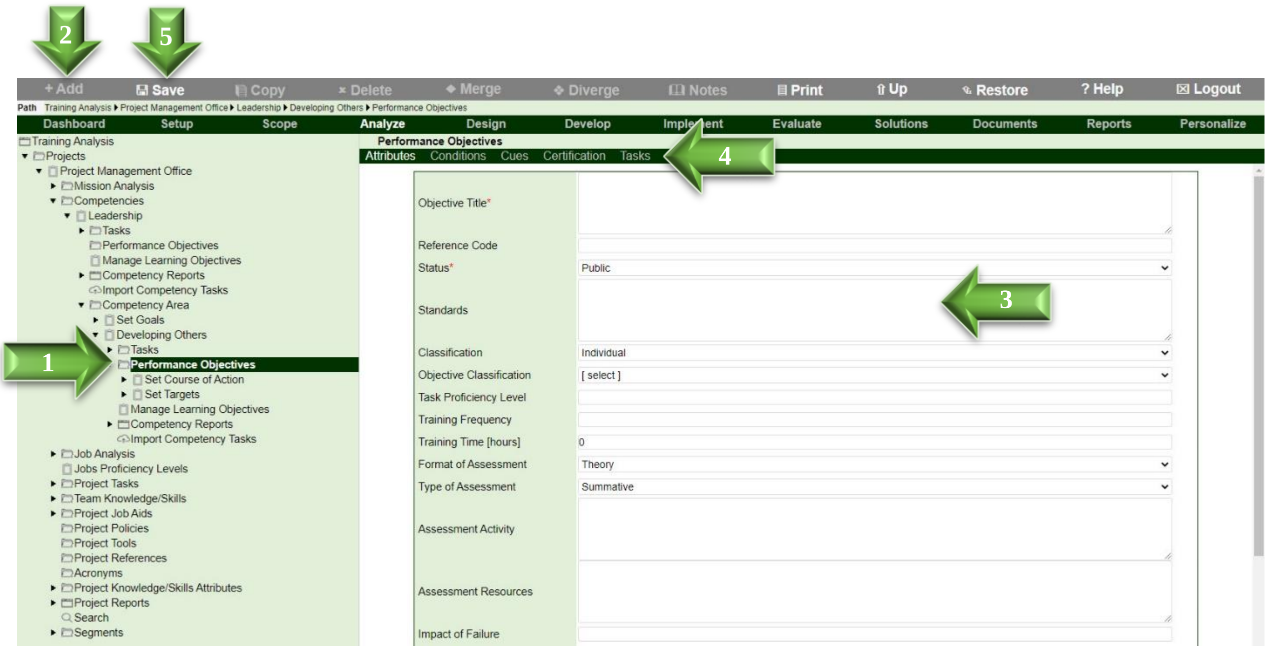

Note:

➢ To preserve data integrity, should the Competency Task attributes change, they automatically cascade to all corresponding Performance Objective attributes if the cascade option is turned on. You may of course turn the cascade option off, to make changes to the Performance Objective.

## Create New Performance Objectives

To add a new Performance Objective:

**Step 1**: Click on the **Performance Objectives** folder under the **(competency)** node.
**Step 2**: Click [**Add**].
**Step 3**: Input the Objective Title, Standards, as well as other attributes.
**Step 4**: Next, click on the [**Conditions**], [**Cues**], [**Certification**] and [**Tasks**] tabs, and complete.
**Step 5**: Click [**Save**], when ready, to create the Objective.




Notes:

- Objective Priority and Training Requirements are dictated by Tasks and Sub Tasks that the Objective supports – i.e., indicated under the Align Attributes with Task field. They are presented under the **Training** node under each **(objective)**.

- Sub Divide Objective: Performance Objective can also be divided into Enabling Objectives. Each Performance Objective can only be assigned as a single unit (including all Enabling Objectives) to a single Competency. In other words, if a Performance Objective is divided into Enabling Objectives A and B, you cannot assign Enabling Objective A to Leadership Competency for example, and Enabling Objective B to General Competency.

- Status: To facilitate data sharing and minimize effort required to analyze Objectives, a Search function is provided to help analysts locate and copy existing Performance Objectives. Analysts can only search for and copy Objectives (but not edit or delete) that are classified as Public under the Status field. If the Performance Objective is classified as Private, it will not be accessible by the Search function.

- Search. To facilitate the analysis, a [**Search**] tab is also presented on the **Performance Objectives** folder. You can search for Performance Objectives by Mission, System, Competency, Job or Keyword. To copy, place checkmarks next to the desired Performance Objectives and click [**Save**]. All Enabling Objectives as well as Knowledge and Skills associated with the selected Performance Objectives are also copied.

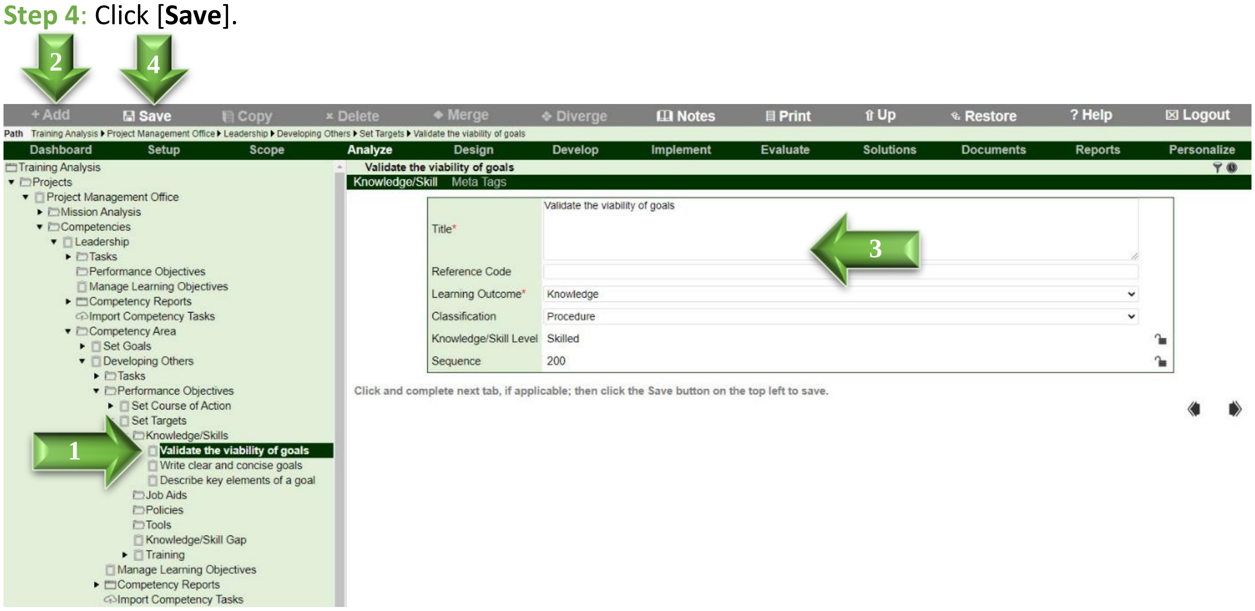
- If References have been defined under the **Project References** folder (Section 6.2 of Training Analysis User Guide), a [**Reference**] tab will also appear after the [**Certification**] tab to link Objectives to specific mandate, requirement, manual, etc. By establishing these links, in addition to documenting the reasoning behind the Objective, analysts can quickly identify which Objectives (including Knowledge, Skills and Attitudes) are affected – should there be a change in a specific mandate, requirement or manual.

## 2.6 Uncover Knowledge and Skills Gaps

### Define POs/EOs Knowledge/Skills

If the Performance Objective was created using the [**Auto Generate**] tab, then all associated KSAs of the Task will be automatically copied to the **Knowledge/Skills** folder. Otherwise you can define the required knowledge and skills for the performance objective as follows:

**Step 1:** Click on the **Knowledge/Skills** folder.
**Step 2:** Click [**Add**].
**Step 3:** Input the Knowledge/Skill Title, Learning Outcome, Classification and Knowledge/Skill Level.
**Step 4:** Click [**Save**].



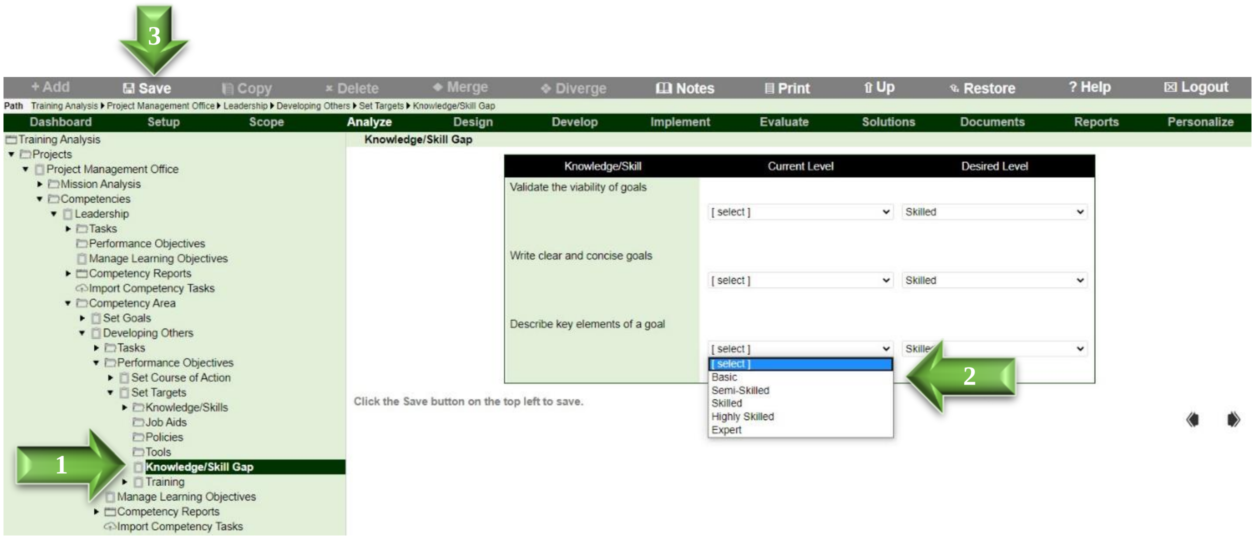

Note:

- Once a knowledge or skill is defined, the **Knowledge/Skills Gap** node is presented under the Performance Objectives folder to identify knowledge/skill gaps.

**Determine Knowledge/Skill Gaps**

To identify knowledge and skill gaps:

**Step 1:** Click on the **Knowledge/Skills Gap** node.
**Step 2:** Indicate the current knowledge and skill levels.
**Step 3:** Click [**Save**].




## Note

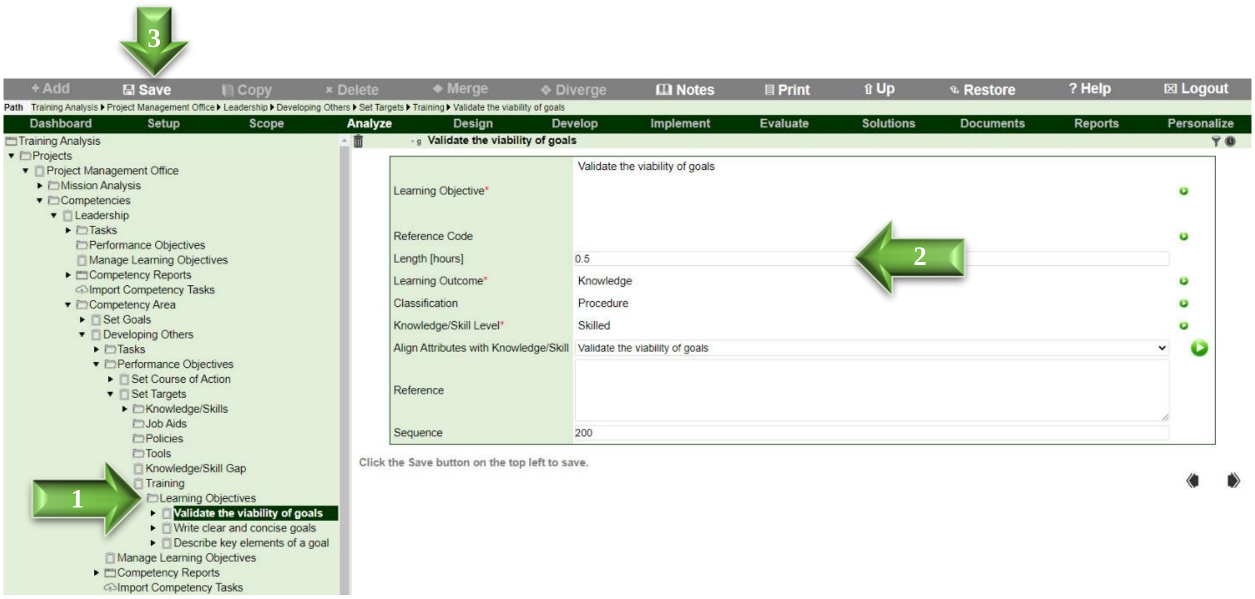
- If Desired level exceeds Current level, a Knowledge/Skill gap is identified; and a Learning Objective is automatically created under the **Learning Objectives** folder under the **Training** node.
- The Knowledge/Skill background changes to green to indicate that a Learning Objective has been setup to address the gap.
- To indicate how the Knowledge/Skill Gap will be addressed, click on the **Training** node, and select Formal Training, Workplace Training or Residual Training Gap.

**Define Learning Objectives**

You may create multiple Learning Objectives (Teaching Points) to address a single knowledge/skill gap. The Learning Objectives should specify the conditions under which knowledge and skills should be exhibited, the standard to which it will be performed and reflect the gap between current and desired level.

To indicate time needed to close the Knowledge/Skill Gap:

**Step 1**: Click on the **(learning objective)** node under the **Learning Objectives** folder.
**Step 2**: Input the Length and edit the Title if required.
**Step 3**: Click [**Save**].




Notes:

- To add a new Learning Objective (Teaching Point), click on the **Learning Objectives** folder, and then click [**Add**]. You will be prompted for the Learning Objective Title, Length, Learning Outcome, Classification and Knowledge/Skill Level. Input the required fields and click [**Save**].

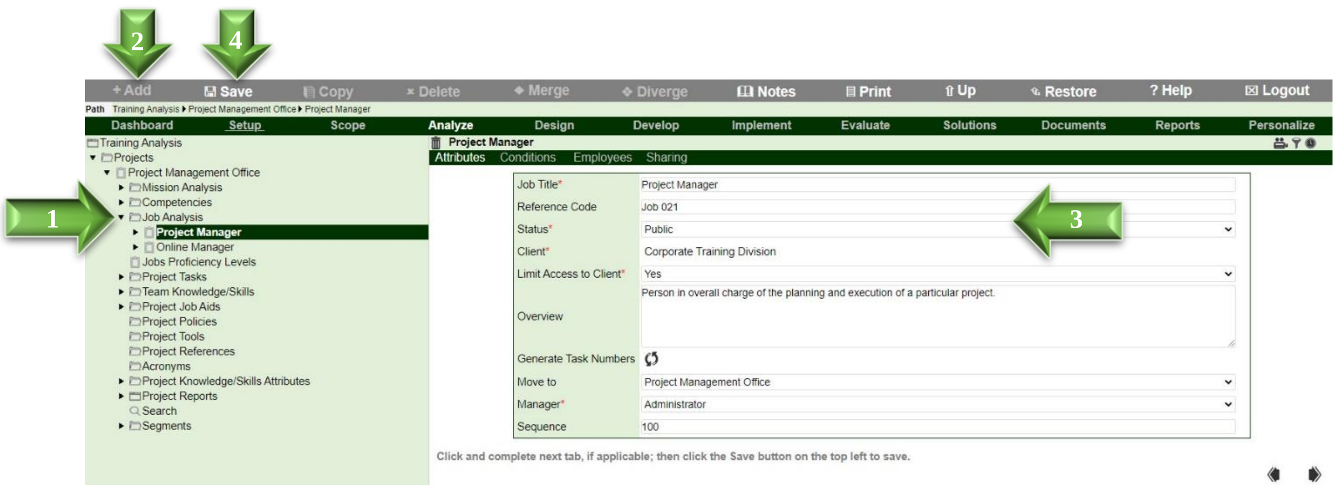
- Learning Objectives can be assembled in courses/training programs. Defining Learning Objectives is therefore critical for establishing clear links between Training Programs, Objectives, Tasks, Jobs and Competencies; demonstrating the value of various training programs, and aligning training with organizational missions/goals.

# Chapter 3: Setup Jobs

## 3.1 Setup Jobs

To identify Jobs to be analyzed:

**Step 1**: Click on the Job Analysis folder.
**Step 2**: Click [**Add**].
**Step 3**: Input the Job Title, a brief overview as well as other relevant data.
**Step 4**: Click [**Save**] to create the job.



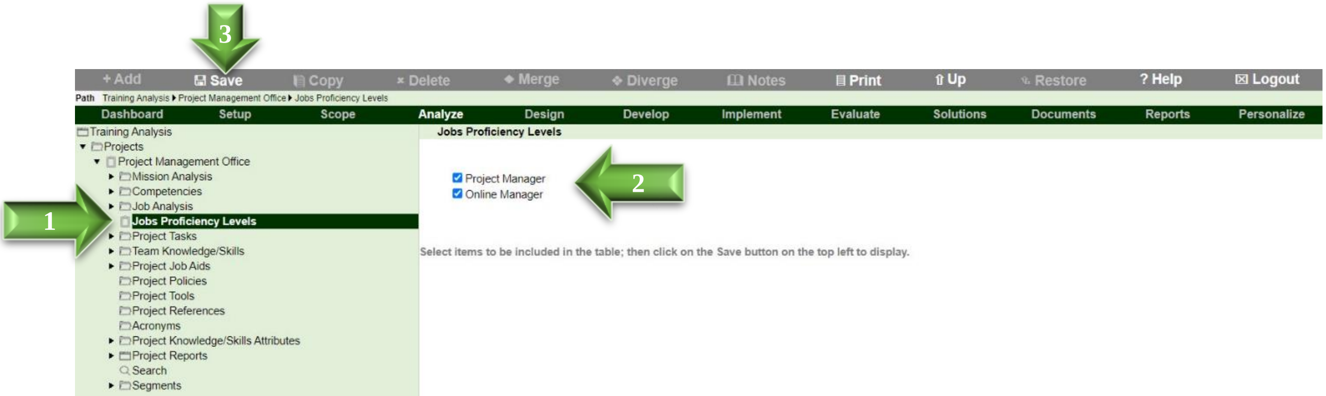

Notes:

- To facilitate the analysis process, public Job Analyses (defined under Status field) are made available to other users (analysts) under the [**Search**] tab. Users may copy relevant analysis (including tasks, performance/enabling objectives, knowledge/skills, etc.) to their own projects. Note that making Job Analysis Public does not imply that others can make changes to your analysis – it simply implies that they can copy and reuse.

- The profile of each job, including financial data as well as instructional design characteristics that may impact the effectiveness of alternate delivery media can also be specified in this section by clicking on the Financial Data, Characteristics, or Attitude nodes, completing relevant sections and clicking [**Save**].

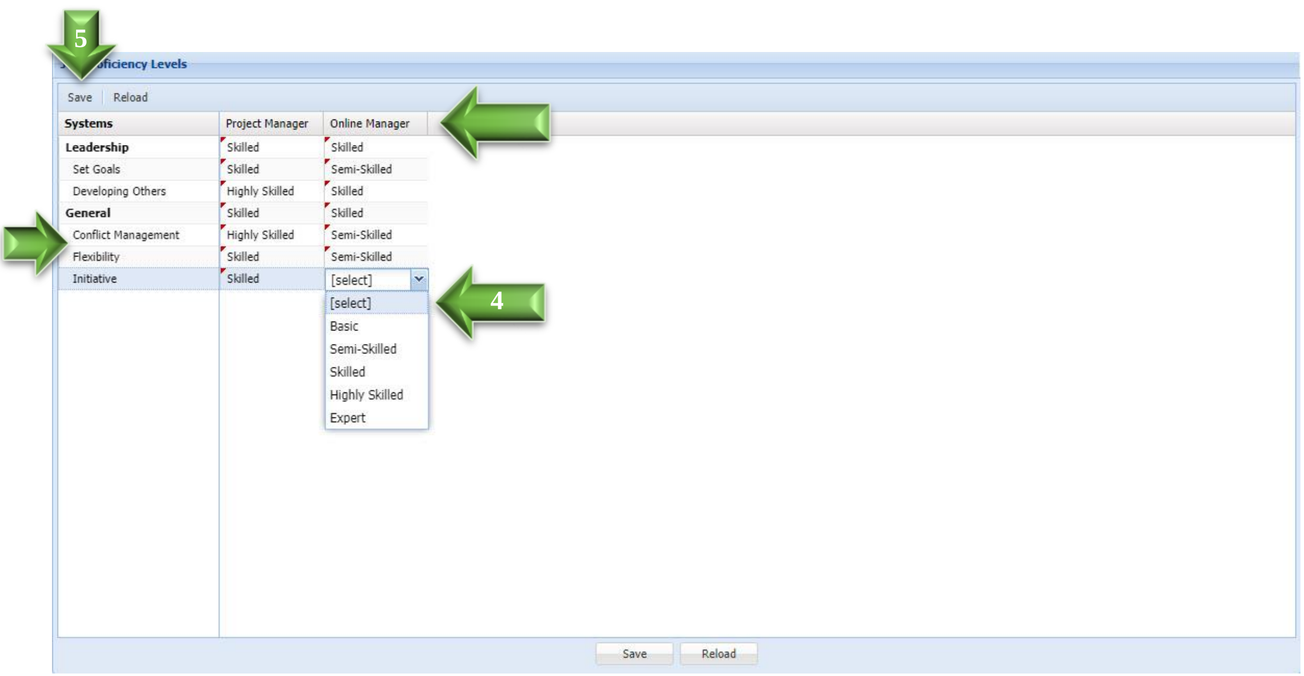
## 3.2 Assign Competencies to Jobs

**Step 1:** Click on the **Jobs Proficiency Levels** node.
**Step 2:** Select Jobs to be analyzed.
**Step 3:** Click [**Save**].




Competencies and Competency Areas created under the **Competencies** folder (Section 2.2) are presented in the 1st column and the Jobs in the 1st row. To indicate the level of competency required by each Job:

**Step 4:** Click on the desired cell to display a dropdown menu, and select the desired level.
**Step 5:** Once the competency requirements for all Jobs have been defined, click [**Save**].



# Chapter 4: Generate Reports

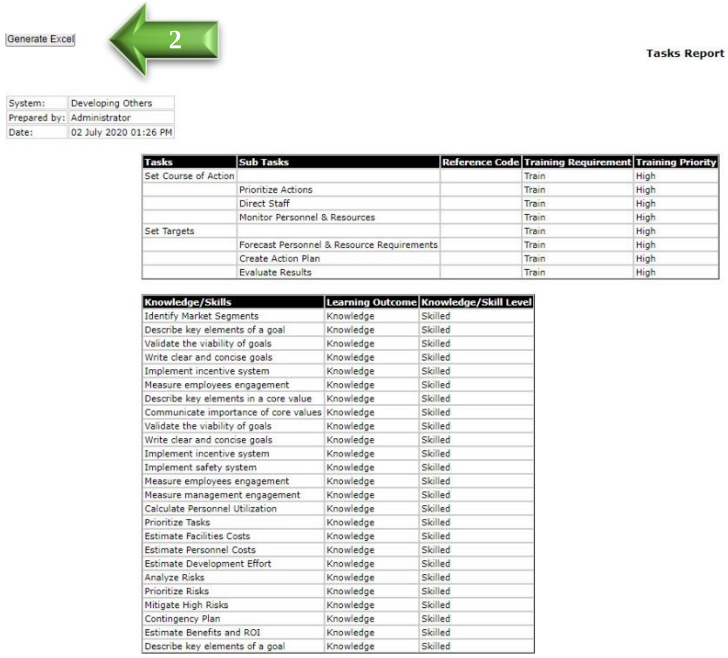
One of ADVISOR's key benefits is the easy and speed in which various types of reports can be generated, for project, systems/competencies and jobs. Several reports are discussed below.

## 4.1 Tasks Report

Generates a concise list of Tasks, Sub Tasks, Steps and Sub Steps for each System/Competency including training requirement and priority, as well as prerequisite Knowledge and Skills. To generate Tasks Report:

**Step 1:** Click on the Task List Report node under the Competency Reports folder.

**Step 2**: You may export the report to Excel, by clicking the [**Generate Excel**] button (top left corner). To return to ADVISOR, close the Report window.




Tasks Report

| | |
|---|---|
| System: | Developing Others |
| Prepared by: | Administrator |
| Date: | 02 July 2020 01:26 PM |

| Tasks | Sub Tasks | Reference Code | Training Requirement | Training Priority |
|---|---|---|---|---|
| Set Course of Action | | | Train | High |
| | Prioritize Actions | | Train | High |
| | Direct Staff | | Train | High |
| | Monitor Personnel & Resources | | Train | High |
| Set Targets | | | Train | High |
| | Forecast Personnel & Resource Requirements | | Train | High |
| | Create Action Plan | | Train | High |
| | Evaluate Results | | Train | High |

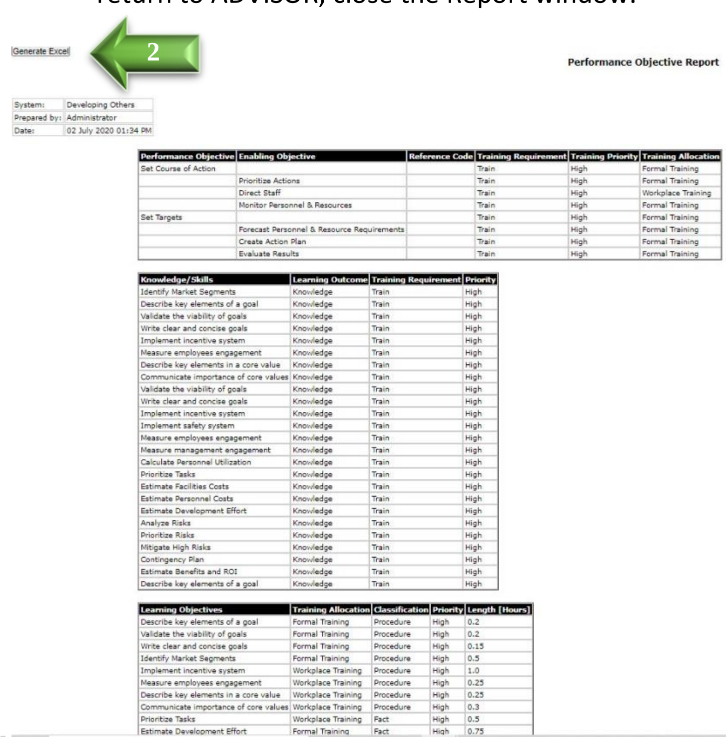
| Knowledge/Skills | Learning Outcome | Knowledge/Skill Level |
|---|---|---|
| Identify Market Segments | Knowledge | Skilled |
| Describe key elements of a goal | Knowledge | Skilled |
| Validate the viability of goals | Knowledge | Skilled |
| Write clear and concise goals | Knowledge | Skilled |
| Implement incentive system | Knowledge | Skilled |
| Measure employees engagement | Knowledge | Skilled |
| Describe key elements in a core value | Knowledge | Skilled |
| Communicate importance of core values | Knowledge | Skilled |
| Validate the viability of goals | Knowledge | Skilled |
| Write clear and concise goals | Knowledge | Skilled |
| Implement incentive system | Knowledge | Skilled |
| Implement safety system | Knowledge | Skilled |
| Measure employees engagement | Knowledge | Skilled |
| Measure management engagement | Knowledge | Skilled |
| Calculate Personnel Utilization | Knowledge | Skilled |
| Prioritize Tasks | Knowledge | Skilled |
| Estimate Facilities Costs | Knowledge | Skilled |
| Estimate Personnel Costs | Knowledge | Skilled |
| Estimate Development Effort | Knowledge | Skilled |
| Analyze Risks | Knowledge | Skilled |
| Prioritize Risks | Knowledge | Skilled |
| Mitigate High Risks | Knowledge | Skilled |
| Contingency Plan | Knowledge | Skilled |
| Estimate Benefits and ROI | Knowledge | Skilled |
| Describe key elements of a goal | Knowledge | Skilled |

## 4.2 Performance Objectives Report

Generates a concise list of Performance and Enabling Objectives for each System/Competency including prerequisite Knowledge and Skills and Training Requirements. To generate Performance Objectives report:

**Step 1:** Click on the Performance Objective Report node under the Competency Reports folder.


**Step 2:** You may export the report to Excel, by clicking the [**Generate Excel**] button (top left corner). To return to ADVISOR, close the Report window.




Performance Objective Report

| | |
|---|---|
| System: | Developing Others |
| Prepared by: | Administrator |
| Date: | 02 July 2020 01:34 PM |

| Performance Objective | Enabling Objective | Reference Code | Training Requirement | Training Priority | Training Allocation |
|---|---|---|---|---|---|
| Set Course of Action | | | Train | High | Formal Training |
| | Prioritize Actions | | Train | High | Formal Training |
| | Direct Staff | | Train | High | Workplace Training |
| | Monitor Personnel & Resources | | Train | High | Formal Training |
| Set Targets | | | Train | High | Formal Training |
| | Forecast Personnel & Resource Requirements | | Train | High | Formal Training |
| | Create Action Plan | | Train | High | Formal Training |
| | Evaluate Results | | Train | High | Formal Training |

| Knowledge/Skills | Learning Outcome | Training Requirement | Priority |
|---|---|---|---|
| Identify Market Segments | Knowledge | Train | High |
| Describe key elements of a goal | Knowledge | Train | High |
| Validate the viability of goals | Knowledge | Train | High |
| Write clear and concise goals | Knowledge | Train | High |
| Implement incentive system | Knowledge | Train | High |
| Measure employees engagement | Knowledge | Train | High |
| Describe key elements in a core value | Knowledge | Train | High |
| Communicate importance of core values | Knowledge | Train | High |
| Validate the viability of goals | Knowledge | Train | High |
| Write clear and concise goals | Knowledge | Train | High |
| Implement incentive system | Knowledge | Train | High |
| Implement safety system | Knowledge | Train | High |
| Measure employees engagement | Knowledge | Train | High |
| Measure management engagement | Knowledge | Train | High |
| Calculate Personnel Utilization | Knowledge | Train | High |
| Prioritize Tasks | Knowledge | Train | High |
| Estimate Facilities Costs | Knowledge | Train | High |
| Estimate Personnel Costs | Knowledge | Train | High |
| Estimate Development Effort | Knowledge | Train | High |
| Analyze Risks | Knowledge | Train | High |
| Prioritize Risks | Knowledge | Train | High |
| Mitigate High Risks | Knowledge | Train | High |
| Contingency Plan | Knowledge | Train | High |
| Estimate Benefits and ROI | Knowledge | Train | High |
| Describe key elements of a goal | Knowledge | Train | High |

| Learning Objectives | Training Allocation | Classification | Priority | Length [Hours] |
|---|---|---|---|---|
| Describe key elements of a goal | Formal Training | Procedure | High | 0.2 |
| Validate the viability of goals | Formal Training | Procedure | High | 0.2 |
| Write clear and concise goals | Formal Training | Procedure | High | 0.15 |
| Identify Market Segments | Formal Training | Procedure | High | 0.5 |
| Implement incentive system | Workplace Training | Procedure | High | 1.0 |
| Measure employees engagement | Workplace Training | Procedure | High | 0.25 |
| Describe key elements in a core value | Workplace Training | Procedure | High | 0.25 |
| Communicate importance of core values | Workplace Training | Procedure | High | 0.3 |
| Prioritize Tasks | Workplace Training | Fact | High | 0.5 |
| Estimate Development Effort | Formal Training | Fact | High | 0.75 |

## 4.3 Training Requirements Analysis Report

Generates the training requirements for each Competency and Competency Area, including the Knowledge, Skills and Attitudes needed by each Performance and Enabling Objective, their classification, as well as Entry and Desired Competency Levels and Gaps. To generate Training Requirements Analysis Report:

**Step 1:** Click on Training Requirements Analysis Report node under Competency Reports folder.


**Step 2:** You may export the report to Excel by clicking on the [**Generate Excel**] button (top left corner). To return to ADVISOR, close the Report window.


Generate Excel

2

Training Requirements Analysis Report

System: Developing Others
Prepared by: Administrator
Date: 02 July 2020 01:47 PM

| Performance Objective | Enabling Objective | Objective Reference Code | Knowledge/Skills | Knowledge/Skills Reference Code | Learning Outcome | Classification | Entry Level | Desired Level | Gap |
|---|---|---|---|---|---|---|---|---|---|
| Set Course of Action | | Lead-02-001 | | | | | | | |
| | Prioritize Actions | Lead-02-001-001 | Describe key elements of a goal | KSA 209 | Knowledge | Procedure | | Skilled | 3 |
| | | | Identify Market Segments | KSA 231 | Knowledge | Procedure | | Skilled | 3 |
| | | | Write clear and concise goals | KSA 005 | Knowledge | Procedure | | Skilled | 3 |
| | | | Validate the viability of goals | KSA 299 | Knowledge | Procedure | | Skilled | 3 |
| | Direct Staff | Lead-02-001-002 | Prioritize Tasks | KSA 421 | Knowledge | Fact | | Skilled | 3 |
| | | | Measure employees engagement | KSA 400 | Knowledge | Procedure | | Skilled | 3 |
| | | | Communicate importance of core values | KSA 112 | Knowledge | Procedure | | Skilled | 3 |
| | | | Implement incentive system | KSA 109 | Knowledge | Procedure | | Skilled | 3 |
| | | | Describe key elements in a core value | KSA 404 | Knowledge | Procedure | | Skilled | 3 |
| | Monitor Personnel & Resources | Lead-02-001-003 | Estimate Facilities Costs | KSA 604 | Knowledge | Fact | | Skilled | 3 |
| | | | Estimate Development Effort | KSA 088 | Knowledge | Fact | | Skilled | 3 |
| | | | Calculate Personnel Utilization | KSA 119 | Knowledge | Fact | | Skilled | 3 |
| | | | Estimate Benefits and ROI | KSA 018 | Knowledge | Fact | | Skilled | 3 |
| | | | Estimate Personnel Costs | KSA 555 | Knowledge | Fact | | Skilled | 3 |
| | | | Measure employees engagement | KSA 154 | Knowledge | Procedure | | Skilled | 3 |
| | | | Measure management engagement | KSA 099 | Knowledge | Procedure | | Skilled | 3 |
| Set Targets | | Lead-02-002 | Describe key elements of a goal | KSA 105 | Knowledge | Fact | | Skilled | 3 |
| | | | Validate the viability of goals | | Knowledge | Procedure | | Skilled | 3 |
| | | | Write clear and concise goals | | Knowledge | Procedure | | Skilled | 3 |
| | Forecast Personnel & Resource Requirements | Lead-02-002-001 | Calculate Personnel Utilization | KSA 119 | Knowledge | Fact | | Skilled | 3 |
| | | | Estimate Facilities Costs | KSA 604 | Knowledge | Fact | | Skilled | 3 |
| | | | Estimate Personnel Costs | KSA 555 | Knowledge | Fact | | Skilled | 3 |
| | | | Measure employees engagement | KSA 154 | Knowledge | Procedure | | Skilled | 3 |
| | | | Measure management engagement | KSA 099 | Knowledge | Procedure | | Skilled | 3 |
| | Create Action Plan | Lead-02-002-002 | Analyze Risks | | Knowledge | Fact | | Skilled | 3 |
| | | | Prioritize Risks | | Knowledge | Fact | | Skilled | 3 |
| | | | Implement safety system | | Knowledge | Procedure | | Skilled | 3 |
| | | | Validate the viability of goals | KSA 299 | Knowledge | Procedure | | Skilled | 3 |
| | | | Implement incentive system | | Knowledge | Procedure | | Skilled | 3 |
| | Evaluate Results | Lead-02-002-003 | Analyze Risks | | Knowledge | Fact | | Skilled | 3 |
| | | | Contingency Plan | | Knowledge | Fact | | Skilled | 3 |
| | | | Mitigate High Risks | | Knowledge | Fact | | Skilled | 3 |
| | | | Prioritize Risks | | Knowledge | Fact | | Skilled | 3 |

Note:

- Training Requirements (highlighted in green) are identified when the Desired Knowledge/Skill/ Attitude Level exceeds Current Knowledge/Skill/Attitude Level.

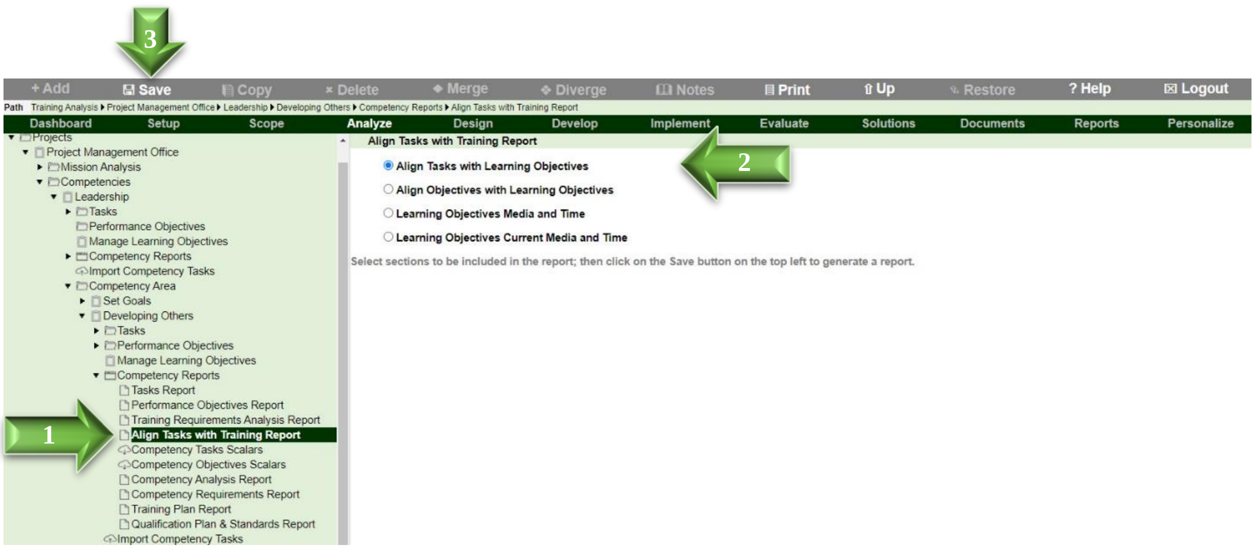
## 4.4 Align Tasks with Learning Objectives Report

To generate audit report and validate that all requirements have been adequately addressed. In other words, how and where the requirements of each Task or Performance Objective are being addressed. The reports may also be used to find out how teaching points have been derived. To generate:

**Step 1**: Click on Align Tasks with Training Report node under the Competency Reports folder.

**Step 2**: Select which audit report you wish to generate, for example the Align Tasks with Learning Objectives.

**Step 3**: Click [**Save**] to generate.




Note:

- The results are presented in a Tabular format.

**Step 4**: You may export the report to Excel, by clicking the [**Generate Excel**] button (top left corner). To return to ADVISOR, close the Report window.

Generate Excel

4

Align Tasks with Training Report

| | |
|---|---|
| System: | Developing Others |
| Prepared by: | Administrator |
| Date: | 02 July 2020 04:12 PM |

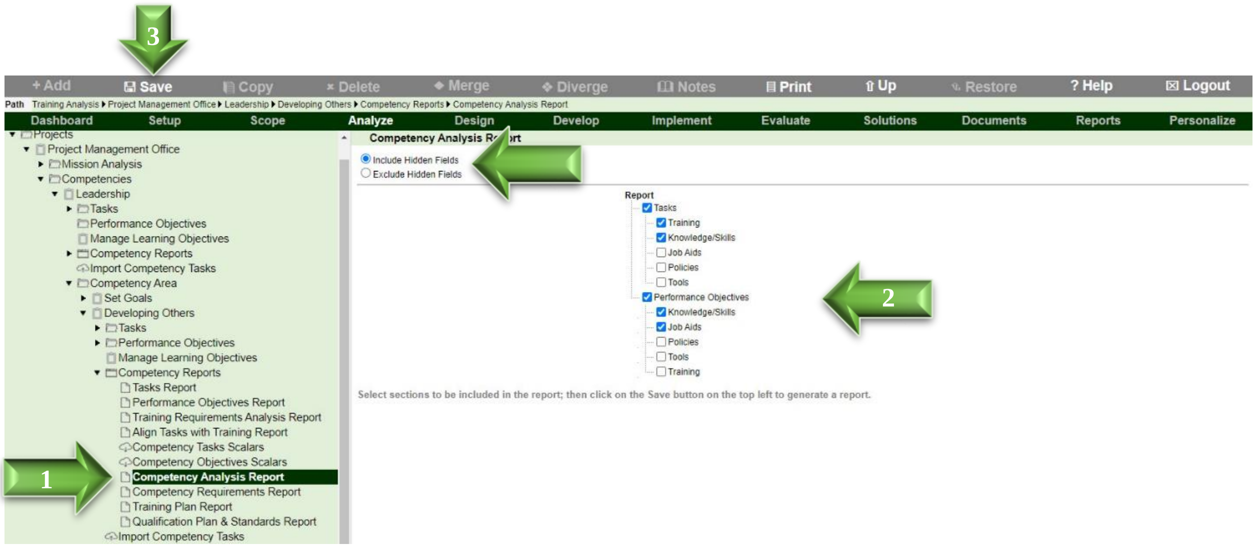
Align Tasks with Learning Objectives

| Task | Sub Task | Training Requirement | Performance/Enabling Objective | Training Allocation | Knowledge/Skills | Gap | Learning Objectives | Lesson | Courses |
|---|---|---|---|---|---|---|---|---|---|
| Set Course of Action | | Train | Set Course of Action | Formal Training | | | | | |
| | Prioritize Actions | Train | Prioritize Actions | Formal Training | Identify Market Segments | Yes | Identify Market Segments | Market Analysis | Project Management |
| | | | | | Describe key elements of a goal | Yes | Describe key elements of a goal | Market Analysis | Project Management |
| | | | | | Validate the viability of goals | Yes | Validate the viability of goals | Market Analysis | Project Management |
| | | | | | Write clear and concise goals | Yes | Write clear and concise goals | Market Analysis | Project Management |
| | Direct Staff | Train | Direct Staff | Workplace Training | Implement incentive system | Yes | Implement incentive system | Market Analysis | Project Management |
| | | | | | Measure employees engagement | Yes | Measure employees engagement | Market Analysis | Project Management |
| | | | | | Describe key elements in a core value | Yes | Describe key elements in a core value | Market Analysis | Project Management |
| | | | | | Communicate importance of core values | Yes | Communicate importance of core values | Market Analysis | Project Management |
| | | | | | Prioritize Tasks | Yes | Prioritize Tasks | Market Analysis | Project Management |
| | Monitor Personnel & Resources | Train | Monitor Personnel & Resources | Formal Training | Measure employees engagement | Yes | Measure employees engagement | Cost Analysis | Project Management |
| | | | | | Measure management engagement | Yes | Measure management engagement | Cost Analysis | Project Management |
| | | | | | Calculate Personnel Utilization | Yes | Calculate Personnel Utilization | Cost Analysis | Project Management |
| | | | | | Estimate Facilities Costs | Yes | Estimate Facilities Costs | Cost Analysis | Project Management |
| | | | | | Estimate Personnel Costs | Yes | Estimate Personnel Costs | Cost Analysis | Project Management |
| | | | | | Estimate Development Effort | Yes | Estimate Development Effort | Cost Analysis | Project Management |
| | | | | | Estimate Benefits and ROI | Yes | Estimate Benefits and ROI | Cost Analysis | Project Management |
| | | | | | Validate the viability of goals | Yes | Validate the viability of goals | Cost Analysis | Project Management |

## 4.5 System/Competency Analysis Report

To generate a comprehensive report for each system/competency including tasks, performance/enabling objectives, learning objectives, training requirements and attributes:

**Step 1**: Click on the **System/Competency Analysis Report** node under the **System/Competency Reports** folder.
**Step 2**: Select items to be included by placing checkmarks next to the desired sections.
**Step 3**: Click [**Save**].



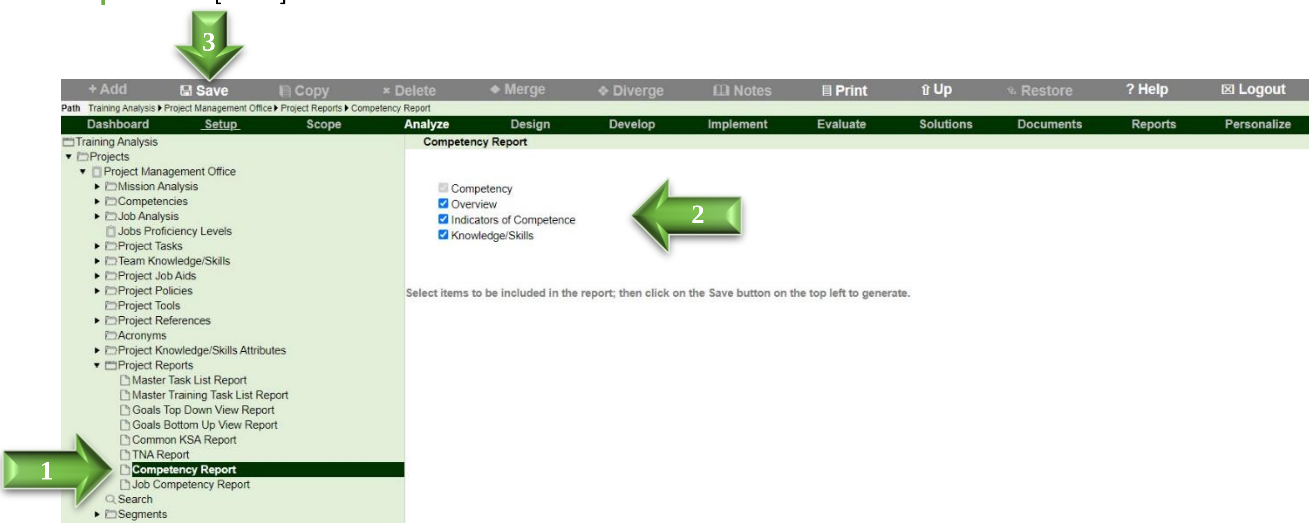
Notes:

- If Exclude Hidden Fields is selected, all hidden fields will not be included in the report.
- Since the report is in html format, you can quickly advance to any section by clicking on the corresponding title in the Table of Contents. You may print or save the report using the corresponding functions in your Browser. To return to ADVISOR, close the Report window.

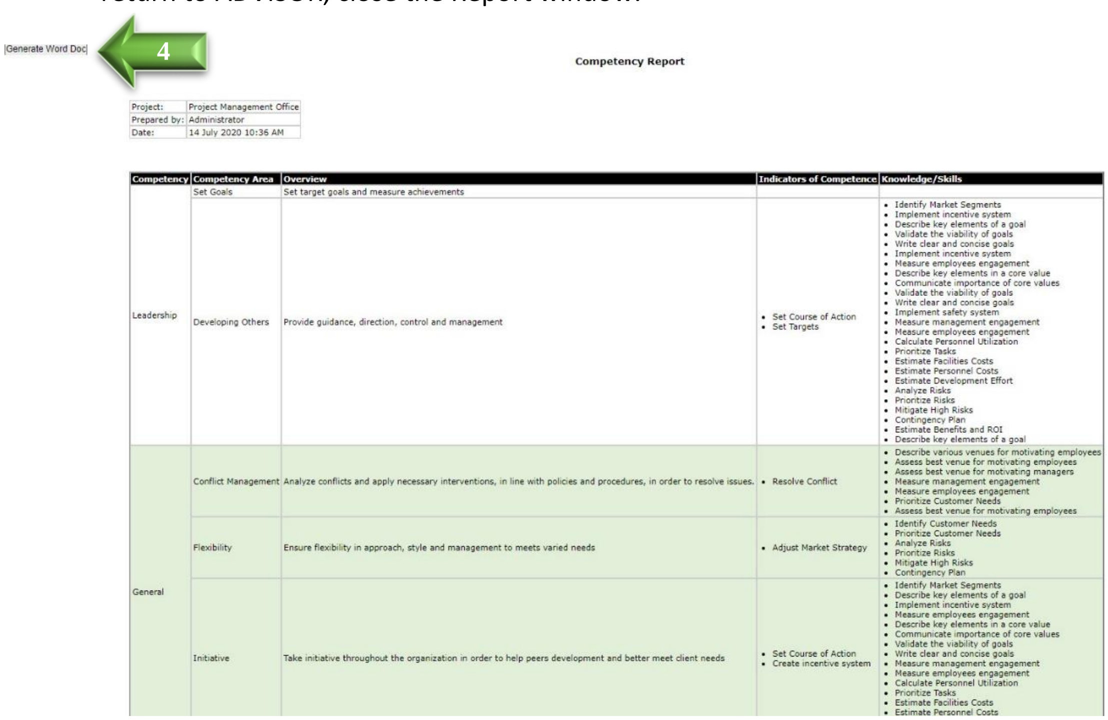
## 4.6 Systems/Competency Report

To generate the Systems/Competency Report:

**Step 1**: Click on Systems/Competency Report node under the Project Reports folder.
**Step 2**: Select items to be included by placing checkmarks next to the desired sections.
**Step 3**: Click [**Save**].




**Step 4**: You may export the report to Excel by clicking on the [**Generate Excel**] button (top left corner). To return to ADVISOR, close the Report window.




Competency Report

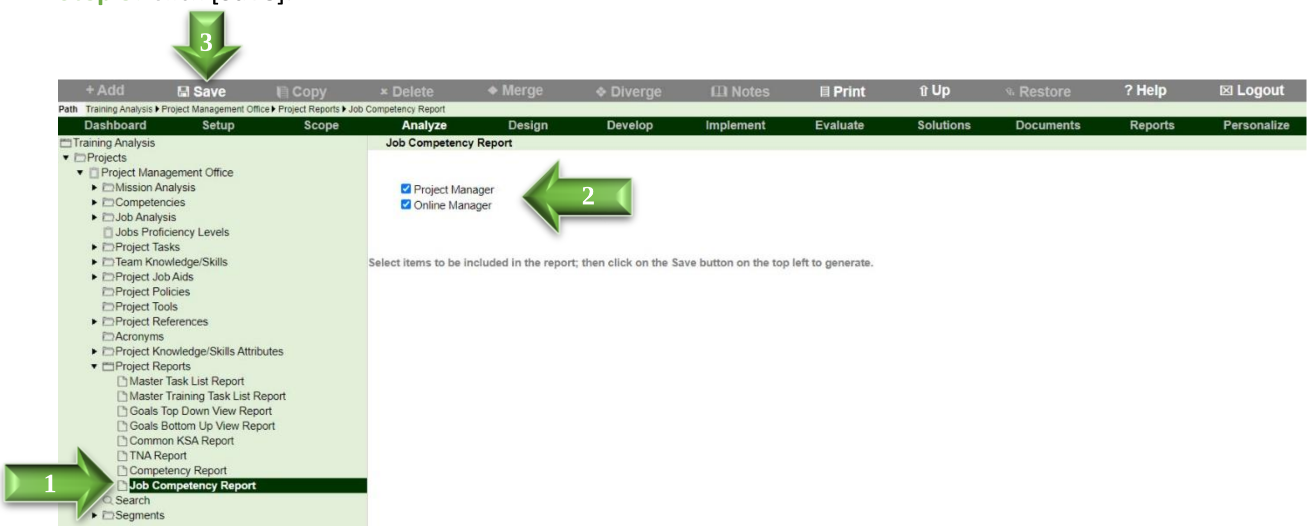
| | |
|---|---|
| Project: | Project Management Office |
| Prepared by: | Administrator |
| Date: | 14 July 2020 10:36 AM |

| Competency | Competency Area | Overview | Indicators of Competence | Knowledge/Skills |
|---|---|---|---|---|
| Leadership | Set Goals | Set target goals and measure achievements | | |
| | Developing Others | Provide guidance, direction, control and management | • Set Course of Action<br>• Set Targets | • Identify Market Segments<br>• Implement incentive system<br>• Describe key elements of a goal<br>• Validate the viability of goals<br>• Write clear and concise goals<br>• Implement incentive system<br>• Measure employees engagement<br>• Describe key elements in a core value<br>• Communicate importance of core values<br>• Validate the viability of goals<br>• Write clear and concise goals<br>• Implement safety system<br>• Measure management engagement<br>• Measure employees engagement<br>• Calculate Personnel Utilization<br>• Prioritize Tasks<br>• Estimate Facilities Costs<br>• Estimate Personnel Costs<br>• Estimate Development Effort<br>• Analyze Risks<br>• Prioritize Risks<br>• Mitigate High Risks<br>• Contingency Plan<br>• Estimate Benefits and ROI<br>• Describe key elements of a goal |
| General | Conflict Management | Analyze conflicts and apply necessary interventions, in line with policies and procedures, in order to resolve issues. | • Resolve Conflict | • Describe various venues for motivating employees<br>• Assess best venue for motivating employees<br>• Assess best venue for motivating managers<br>• Measure management engagement<br>• Measure employees engagement<br>• Prioritize Customer Needs<br>• Assess best venue for motivating employees |
| | Flexibility | Ensure flexibility in approach, style and management to meets varied needs | • Adjust Market Strategy | • Identify Customer Needs<br>• Prioritize Customer Needs<br>• Analyze Risks<br>• Prioritize Risks<br>• Mitigate High Risks<br>• Contingency Plan |
| | Initiative | Take initiative throughout the organization in order to help peers development and better meet client needs | • Set Course of Action<br>• Create incentive system | • Identify Market Segments<br>• Describe key elements of a goal<br>• Implement incentive system<br>• Measure employees engagement<br>• Describe key elements in a core value<br>• Communicate importance of core values<br>• Validate the viability of goals<br>• Write clear and concise goals<br>• Measure management engagement<br>• Measure employees engagement<br>• Calculate Personnel Utilization<br>• Prioritize Tasks<br>• Estimate Facilities Costs<br>• Estimate Personnel Costs |

## 4.7 Job System/Competency Report

To generate the Job System/Competency Report:

**Step 1**: Click on Job System/Competency Report node under the Project Reports folder.
**Step 2**: Select Jobs to be included by placing checkmarks next to the desired items.
**Step 3**: Click [**Save**].




**Step 4**: You may export the report to Excel by clicking on the [**Generate Excel**] button (top left corner). To return to ADVISOR, close the Report window


**Job Competency Report**

| | |
|---|---|
| Project: | Project Management Office |
| Prepared by: | Administrator |
| Date: | 08 July 2020 01:29 PM |

| Competency | Competency Area | Project Manager | Online Manager |
|---|---|---|---|
| **Leadership** | | Skilled | Skilled |
| | Set Goals | Skilled | Semi-Skilled |
| | Developing Others | Highly Skilled | Skilled |
| **General** | | Skilled | Skilled |
| | Conflict Management | Highly Skilled | Semi-Skilled |
| | Flexibility | Skilled | Semi-Skilled |
| | Initiative | Skilled | Skilled |

Remember that context sensitive help is also available for each screen by clicking on [**Help]** and video clips on how to perform specific functions by clicking on the video icon.

**Enjoy!**